



## STRATEGIC PLAN

2018-2021

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



## **Tucson Association of REALTORS®**

The Tucson Association of REALTORS® (TAR) is the largest trade association in Southern Arizona, representing the interests of over 5,100 real estate professionals. United by adherence to a Code of Ethics, our members work as real estate professionals in the sale, lease, appraisal, and development of residential and commercial properties as well as the mortgage and lending industry throughout Southern Arizona.

The Association serves as the voice of the real estate industry in Southern Arizona. Services provided to members include, professional and licensed-related education, public policy advocacy, participation on committees, annual meetings and trade expo, regular member communiques and publications and numerous other benefits and discounts.

The Association is the sole shareholder of a wholly owned for-profit subsidiary, the name of which is the Tucson Association of REALTORS®/Multiple Listing Service, Inc. hereinafter referred to as the (“MLS”).

## **Tucson Association of REALTORS®/Multiple Listing Service, Inc D.B.A. Multiple Listing Service of Southern Arizona**

The Multiple Listing Service of Southern Arizona (MLSSAZ) is a wholly-owned for-profit subsidiary of the Tucson Association of REALTORS®. It is a reliable, cooperative real estate database of listing and sale information in Southern Arizona.

## **Tucson REALTORS® Charitable Foundation**

The Tucson REALTORS® Charitable Foundation (TRCF) is a 501(c)3 non-profit organization that also is a wholly-owned subsidiary of the Tucson Association of REALTORS®. TRCF’s mission is to assist our community by enhancing its quality of life through financial programs, education, and housing-related initiatives and community activities. TRCF awards grants to non-profit organizations throughout the region from the donations of TAR members, affiliates, friends and fund-raising events.

## **REALTOR®**

REALTOR® is a federally registered collective membership mark which identifies a real estate professional who is member of the NATIONAL ASSOCIATION OF REALTORS® and subscribes to its strict Code of Ethics.

## 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.**

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| <b>Objective</b>  | Increase awareness and value of the Tucson Association of REALTORS®, its services and benefits to various segments within membership  |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>1. Review current tools and metrics for effectiveness</li> <li>2. Research communication platform options and tools</li> <li>3. Develop two-way conversations               <ol style="list-style-type: none"> <li>1. Foster ongoing conversations with brokers and use them as messengers</li> <li>2. Engage the TAR Affiliate members in co-branding and co-advertising the benefits and value of using a REALTOR®</li> </ol> </li> </ol>  |
| <b>Objective</b>  | Promote public awareness of the value of using a REALTOR® and Affiliate   |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>1. Implement an ongoing public relations campaign about the benefits and value of utilizing REALTOR® services</li> <li>2. Develop an ongoing campaign of advertising and branding of TAR</li> </ol>  |
| <b>Objective</b>  | 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   |
| <b>Strategy</b>   | <ol style="list-style-type: none"> <li>1. Provide MLSSAZ data to the media and other key sources</li> <li>2. Measure current effectiveness identifying gaps and opportunities</li> <li>3. Identify strategy to work with partners providing most relevant, and current information (Top Producers, Trends, Schools)</li> </ol>  |
| <b>Objective</b>  | 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)   |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>1. Advertise and promote all community engagement activities of TAR members</li> <li>2. Publicize community engagement projects and business/industry partnerships</li> <li>3. Annually advertise the recipients of the REALTOR® of the Year, Affiliate of Year, &amp; TRCF grant recipients.</li> <li>4. Continue the use of social media through FB, Twitter, YouTube, LinkedIn using NAR talking points and relevant articles</li> <li>5. Publicize consumer resources (i.e., website, Welcome Home website)</li> </ol> |

## Regionalization

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

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| <b>Objective</b>  | Develop and implement a fee based service model to provide operational and support services to real estate related organizations and associations.  |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Create Regionalization Leadership Team (Reports to the TAR Board of Directors)</li><li>2. Develop an objective analysis model for identifying and evaluating potential partners - Leadership Team</li><li>3. Identify models and services currently available which could be supported by Regionalization</li><li>4. Develop models and services for future growth</li></ol> |
| <b>Objective</b>  | Develop Regionalization Plan, including communication, to gain internal support of organizations membership   |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Develop communication plan for membership, both local &amp; future</li></ol>   |
| <b>Objective</b>  | Develop Strategy to service commercial industry with a commercial exchange  |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Identify current needs and opportunities in MLS</li><li>2. Develop model for new commercial service using best practices in the industry</li><li>3. Implement model and cost structure</li></ol>   |
| <b>Objective</b>  | Position internal organization for future opportunities and growth  |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Evaluate and implement change in association name</li><li>2. Identify staff to lead efforts, as well as supporting staff</li><li>3. Structure organization to lead and implement plans<ol style="list-style-type: none"><li>a. Board leadership</li><li>b. Staffing</li></ol></li></ol>  |

## 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.**

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

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

## 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.**

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| <b>Objective</b>  | Proactively impact local ordinances, laws and policy issues   |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>1. Identify local issues and programs that are appropriate and use all resources available to include AAR or NAR Issues Mobilization grants</li> <li>2. Utilize all communications resources to educate members about issues and policies that impact our members</li> <li>3. Utilize resources such as Advocacy Everywhere to increase participation in Calls for Action</li> <li>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</li> <li>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</li> </ol> |
| <b>Objective</b>  | 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  |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>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</li> <li>2. Investigate the potential for utilization of independent expenditure funding and, if appropriate, apply for such funding from NAR and/or AAR</li> <li>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</li> </ol>  |
| <b>Objective</b>  | Increase RAPAC participation and meet or exceed investment goals  |
| <b>Strategies</b> | <ol style="list-style-type: none"> <li>1. Establish a RAPAC fundraising committee</li> <li>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</li> <li>3. Plan and conduct a major investor event annually and ensure that major investors are provided with appropriate recognition throughout the year</li> <li>4. Set goals to meet 3 tiers of investment success; participation, dollars Major Investors</li> </ol>  |
| <b>Objective</b>  | Education for the public and media at least twice a year on TAR advocacy efforts  |
| <b>Objective</b>  | 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.**

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| <b>Objective</b>  | Identify community activities and opportunities that are essential for promotion of TAR, MLSSAZ and TRCF   |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Identify "core" partnerships essential to home ownership</li><li>2. Identify local events, large and small, providing best opportunity for promotion and involvement</li><li>3. Develop annual plan for member engagement</li><li>4. Develop operational policies providing clarity for efforts</li></ol> |
| <b>Objective</b>  | Create plan to highlight and promote members contributions to the community  |
| <b>Strategies</b> | <ol style="list-style-type: none"><li>1. Survey current involvement of leadership and active members</li><li>2. Identify and develop opportunities to promote the good will of members</li></ol>   |

## Administration

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

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