



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

## MEETING AGENDA

Committee: MLSSAZ Board of Directors  
Meeting Date: September 24, 2020  
Chair: Sue Cartun, President

- I. Call to Order 3:00pm
- II. Consent Agenda\*
  - A. Board of Directors Meeting Report, August 27, 2020 .....2
  - B. Committee Reports
    - 1. Executive Committee, August 24 and September 14, 2020..... 4
    - 2. Rental Listing Workgroup, September 15, 2020.....7
  - C. New Subscriber Report..... 8
  - D. Trends Reports
    - 1. Membership Trends ..... 11
    - 2. Market Summary ..... 12
    - 3. Inventory Trends..... 13
  - E. 2020 Business Plan ..... 14
  - F. August Education Report ..... 17
- III. Treasurers Report: *Cheryl Terpening*
  - A. Balance Sheet ..... 18
  - B. Budget vs. Actuals.....20
  - C. Equity & Reserves..... 21
  - D. MLS Fees renewal update – *CEO Rogers*
  - E. 2021 Budget Planning – *President-elect David Dynes*
- IV. Unfinished Business
  - A. SCCBR Service Center Agreement Request\* *CEO Rogers*
    - 1. Revised SCCBR 2021 Service Center Budget .....22
    - 2. Bylaws revision request: Regional Advisory Council ..... 23
- V. New Business
  - A. Standards Committee Report, September 9, 2020\* *President Cartun*.....26
  - B. Technology Committee Report, September 1, 2020\* *President Cartun*..... 27
  - C. AAR Request to share data with RPR\* *CEO Rogers*.....28
  - D. \$500 Donation to the Hearth Foundation in the name of Past MLS President Mike Waling\* *President Cartun*
- VI. Updates
  - A. Coming Soon Workgroup – *President Cartun*
  - B. Website RFP Progress – *CEO Rogers*
  - C. Zendesk – Help Desk Program – in launch stages – *CEO Rogers*

ADJOURN

\*= Items that may require action

### Meeting Dates

- 1. MLS Standards Committee, 10/14/2020 – 1:30pm
- 2. MLS Technology Committee, 10/6/2020 - 2:30pm
- 3. MLSSAZ Executive Committee, 10/14/2020 – 11:30am
- 4. MLSSAZ Board of Directors, 10/19/2020 – 3:00pm
- 5. 2020 Board of Directors Meeting Dates: 10/22, 11/18, 12/17



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

Committee: MLSSAZ Board of Directors (Zoom Video Conferencing)  
Meeting Date: August 27, 2020  
Chair: Sue Cartun, President  
Call to Order: 3:04pm

Attendance:	Jim Adams	Lori Adamson	James Bowman	Sue Cartun
	Kim Clifton	Susan Derlein	David Dynes	Louis Parish
	Joette Schenck	Cheryl Terpening		
Absent:	Cathy Erchull	John Gebhart	Diane Marzonie	
Staff:	Christine Sanchez	Randy Rogers	Jennifer Bailey	Andrew Castillo

## Action Items:

M/S/C: Move to approve the Consent Agenda as presented.

M/S/: Move to approve to postpone the Santa Cruz County Board of REALTORS Service Center Agreement discussion.

M/S/C: Amend the motion to reconvene before September 15<sup>th</sup> when the Board has more information.

M/S/C: The underlying motion as amended.

M/S/C: Move to approve to create a Coming Soon Workgroup to review the Coming Soon rules and present their recommendations to the MLS Board of Directors.

M/S/C: Ratify the formation of the MLS Rental Listings Workgroup.

M/S: Move to approve to purchase 1000 Supra Lockboxes at \$89 apiece.

M/S/C: Amend the motion to reduce the purchase to 500 Supra Lockboxes.

M/S/C: The underlying motion as amended.

M/S/C: Move to approve moving the November meeting date from Thursday, November 19<sup>th</sup> to Wednesday, November 18<sup>th</sup>.

## Information Items:

- Review of the July financials.
  - The Community Donation line item will be updated to reflect a donation to the Community Food Bank.
  - ShowingTime is not listed as a budgeted item.
    - CEO Rogers will request to have separate line items for the ShowingTime products: MarketStats and Showing Management.
  - 6034 MLS Fees invoices have been paid as of Monday, January 24<sup>th</sup>; 10 members have paid late a fee.
    - Board of Choice are at 56; they were terminated for non-payment and which also decreases the per Subscriber fees paid to vendors.
- Review of the 2020 Business Plan Update which tracks the progress of goals to accomplish in 2020; the document will be provided to the board monthly.
- A request was made by the Santa Cruz County Board of REALTORS (SCCBBR) Executive Officer to postpone the discussion on their Service Agreement Request. They have requested to meet with the TAR and MLS Executive Officers the week of August 31. A motion was made, seconded, amended and passed to postpone the SCCBBR Service Center Agreement discussion and reconvene before September 15<sup>th</sup>.
  - David Dynes and Louis Parrish met with SCCBBRs President and President-elect on August 21<sup>st</sup> to discuss how MLSSAZ can best serve them in the future.

- CEO Rogers will continue to reach out to SCCBR to notify them of the **board's** decision and the reason for their request.
- Discussion of the inconsistencies in coming soon listings based on the technology agents use. It was discovered that a functionality exists in FlexMLS allowing coming soon listings to be sent in client portal saved search updates but is not available in IDX feeds.
  - A motion was made seconded and passed to create a Coming Soon Workgroup to review Coming Soon rules and present their recommendation to the board. President Cartun will create the workgroup charge and has requested board members send recommendations on Subscribers or Participants to serve on the workgroup.
- President Cartun created an MLS Rental Listings Workgroup to address the requested changes made by the TAR Property Management Committee in 2019 and how MLSSAZ policies and standards relate to rental listings and recommend changes. The board ratified the formation of the MLS Rental Listings Workgroup.
- CEO Rogers reported that the TAR Board of Directors agreed to slowly reopen the association through the month of September. Committee meetings will continue to meet via Zoom in September.
- The MLS Website Workgroup has met twice and documented their recommendations for the website. Staff will utilize the information to begin the RFP vendor process.
- CEO Rogers reported that we are down to approximately 280 lockboxes and is requesting to purchase 1000 lockboxes at \$89 apiece. A motion was made, seconded, amended and passed to purchase 500 lockboxes at \$89 apiece.
- President Cartun reported TAR has scheduled their installation for Thursday, November 19<sup>th</sup>, the same day as the MLS Board meeting and requested to change the meeting to Wednesday, November 18<sup>th</sup>. A motion was made, seconded and passed to change the meeting date.
- Adjourned at 4:47pm



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

**Committee:** MLSSAZ Executive Committee (Zoom)  
**Meeting Date:** August 24, 2020  
**Chair:** Sue Cartun, President  
**Call to Order:** 11:32 am

**Attendance:** Sue Cartun      David Dynes      Louis Parrish      Cheryl Terpening

**Staff:** Randy Rogers

## Action Items:

M/S/C: Move to approve the July 20<sup>th</sup>, 2020 Meeting Report as presented.

## Information Items:

- Coming Soon Issues – Two main issues
  - Coming Soon listings not going out on in IDX feeds and agent's ability to push out (sharable) the links with Coming Soon listings.
    - Andrew Castillo explained the 2 different concerns for Coming Soon from the beginning.
      - Option was no IDX and no syndication. This was chosen and a positive change and fixed many items that were challenging for agents.
      - Option to distribute outside of the MLS. Agents ability to email information out.
      - Currently the syndication was turned off and the policy of Coming Soon only going to the subscribers, but agents have the ability to share via saved searches.
    - Further general discussion followed:
      - Is the MLS going against the original intent by allowing agents to email out Coming Soon listings?
      - Question of how we manage this through IDX and RETS feeds.
      - Also suggested a lead time for sellers/listing agents if we change the policy
    - Final Plan
      - Initiate a Work Group to review the issues involving current active agents. 6-8 people and this should be done as quickly as possible.
      - Work Group should also review the Clear Cooperation Policy and what concerns exist after implementation
- MLSSAZ 2020 Business Plan was reviewed. Only concern was the feeling of the timelines being too long. CEO will update for every Board meeting. #1 initiative is providing the best customer service.
- Financial
  - Fees renewals stand at 6034 as of today
  - July financials approved and adjustment of categories requested and will be done for August.
  - SCCBR service agreements discussed and options reviewed. Ultimately 4 options came to light.
    - Accept current request
    - Do nothing and allow the 2020 to roll to 2021
    - Offer some amount for portion of 2020 and renegotiate.
    - Serve notice that the 2020 agreement will end on 12/31/20
  - President Elect Dynes discussed 2021 Budget process. Meeting to be set to review and involve the Budget and Finance Committee.
  - Purchase of SUPRA key safes was discussed and will go to Board vote.
  - Discussion and confirmation of RAPAC investment of \$10,000. Percentage will also be shared with all three associations based on subscriber numbers.
- Rental Listings workgroup established and already meeting to determine how best to serve the property managers and rental listings in the MLS.

- Updates
  - Building opening update that it will likely remain closed in September
  - Website Workgroup completed and the RFP process has started.
- Meeting Adjourned: 2:12 pm.



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

**Committee:** MLSSAZ Executive Committee (Zoom)  
**Meeting Date:** September 14, 2020  
**Chair:** Sue Cartun, President  
**Call to Order:** 11:31 am

**Attendance:** Sue Cartun      David Dynes      Cheryl Terpening      Louis Parrish

**Staff:** Randy Rogers

## Information Items:

- Executive Committee meeting report from August 24, 2020 to be included in next meeting packet and Board packet for approval.
- Arizona REALTORS request to share RPR data with NAR
  - Discussion of the Arizona REALTORS request to share RPR data from MLSSAZ with NAR was had and what the objective is to use the data. Rogers stated that he was informed it would be used for general legislative knowledge about the various states and congressional districts and used in general advocacy information efforts.
  - After discussion, CEO Rogers is to inquire as to how they plan to use the requested information, if permission granted, can it be revoked at any time, and when the aggregated data is available, can we obtain a copy of it.
  - Once further information is obtained this should go to a Board vote.
- Request to review Products and Services
  - CEO Rogers brought the concern of products and services being recommended for research and implementation from subscribers and not the Board.
  - After discussion it was determined that CEO Rogers should develop a process for this and the item in question should then go to the appropriate committee for review.
- Financials
  - CEO Rogers announced the current number of subscribers is 6187 and 152 people paid late fees.
  - 2021 Budget Process, President Elect Dynes.
  - August Financials had not arrived. Request was made to obtain these earlier in the month.
  - SCCBR Service Center Agreement was discussed that included a new budget request. Also included was a request for By-Laws changes to include updates on the Regional Advisory Council. CEO Rogers also brought informational email to the attention of the group.
  - Options were discussed as to the future and that this information should be brought to the Board, along with a request for a vote to finalize agreement.
  - GVSAR is requesting no change for the 2021 Agreement.
  - Request was made for a \$500 donation in the name of Past President Mike Waling to the Hearth Foundation. This will go to the Board for a vote.
- Updates
  - President Cartun shared the Rental Listing Workgroup is moving quickly and has another meeting tomorrow.
  - CEO Rogers updated on the building remaining in a restricted open mode.
  - CEO Rogers will have the 2020 Business plan updated for the Board.
  - CEO Rogers shared the Website RFP is nearing completion.
- Cheryl Terpening brought forward a request from the Risk Committee of TAR to retain copies of photos in a listing even after the listing is closed. This is to be available for appraisals and CMA's. This will go to Standards and then need to be reviewed by attorney as well.
- Meeting Adjourned 1:31 pm



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

## MLS Rental Listing Workgroup

**Meeting Date:** September 15, 2020

**Chair:** Steven Schultz

**Called to order:** 2:01 PM

**Present:** Steven Schultz, Colleen Kessler, Sue Cartun, Ginny Huffman, Louis Parrish, Susan Creedon

**Absent:** Linda Seeley, April Richards,

**Staff:** Lori Wadsack, Andrew Castillo.

## Objectives:

- To compare items of original task force, identify any new items that need to be addressed, recommend changes that will enable property managers to more easily utilize MLSSAZ
- Address how MLSSAZ policies and standards relate to rental listings, recommend potential changes needed for compliance to policies
- Recommend specific education and communication to instruct correct usage of rental listings including policies and standards.

## Information Items:

- Steven Schultz Chairman chaired this meeting.
- The group discussed the education and communication surrounding the recent improvements made to the rental property type. The following series of communications were recommended for distribution.
  - Incorporate Rental listings into MLS orientation
    - Highlight the strong presence of rentals in the MLS to create awareness for rental properties.
    - Provide instruction how to properly search for rentals in the MLS.
  - Steven Schultz to write an article on the work accomplished by the Rental Listing Workgroup. The article will be distributed as part of the various informational packets.
  - Instructional email message to brokers, managers, and office staff via video & handout material.
    - Feature improved Rental Profile Sheet.
    - Highlight revised policies.
    - Provide instruction on listing maintenance.
    - Provide instruction how to properly search for rentals in the MLS.
  - Gateway Message.
    - Short message highlighting the recent changes to rental properties and add link to the following:
      - Improved Rental Profile Sheet.
      - Highlight revised policies.
      - Provide instruction on listing maintenance.
  - Newsletter bulletin.
    - Create awareness by providing an overview of changes to rental property types.



# New Subscribers

8/1/2020 through 8/31/2020

Last Name	First Name	Office	Type	Association
Lovell	Craig	Carlos D. Jacome	APPR	TAR
Dominick	William	Integra Realty Resources - Pho	APPR	Other
Camargo	Tomi	Ivory Towers Realty	MAB	Other
Harris	Glen	Kenneth James Realty	MAB	Other
Mills	Heather	Berkshire Hathaway HomeService	MAB	Other
Moreno	Ramon	HomeSmart Lifestyles	MAB	Other
Henry	Jennifer	Tierra Antigua Realty (SV)	MAB	Other
Smith	Rod	Realty One Scottsdale	MAB	Other
Medina	Juan	HomeSmart	MAB	Other
Chavez	Nicole	Crossroads Brokerage	MAB	Other
Rust	Steven	West USA Realty	MAB	Other
Jelten	Tessa	eXp Realty 07	MAB	Other
Fimbres	Cindy	HomeSmart	MAB	Other
Jones	Alexa	My Home Group Real Estate	MAB	Other
Le Clerc	Jack	My Home Group Real Estate	MAB	Other
Reyes	Mayra	HomeSmart	MAB	Other
Ringenbach	Steven	The Maricopa Real Estate Co	MAB	Other
Garibay	Edgar	OZ Realty	MAB	Other
Cerruti	Michelle	Realty ONE Group	MAB	Other
Nakajima	Miki	eXp Realty LLC	MAB	Other
Green	Edward	HomeSmart	MAB	Other
McDermed	Lisa	West USA Realty	MAB	Other
Gwinn	Jennifer	Realty Executives	MAB	Other
Leonard	James	The Maricopa Real Estate Co	MAB	Other
Hernandez	Melissa	eXp Realty LLC	MAB	Other
Burrue	Leonor	Ivory Towers Realty	MBB	Other
Murray	Steve	The Maricopa Real Estate Co	MBB	Other
Kellander	James Gordon	Keller Williams Integrity 01	MBB	Other
Schwalb	Rodney	Phoenix Arizona Realty, LLC	MBB	Other
Moss	Jason	RCP Real Estate LLC	MBB	Other
Sandoval	Stephanie	HomeSmart Lifestyles	MBB	Other
Razi	Michael	Realty One Scottsdale	MBB	Other
Anglin	Derek	Anglin Properties LLC	MBB	Other
Wright	Jane	Jane Wright	MBB	Other
Jones	Robert	OfferPad	MBB	Other
Borbon	Luis	BM Continental Realty	R	SCCBOR
Moreno	Ana	BM Continental Realty	R	SCCBOR
Benequista	Anthony	OMNI Homes International	R	TAR
Licavoli	Peter	Tucson Realty Now	R	TAR
Romanov	Joseph	Tierra Antigua Realty	R	TAR
May	Monica	eXp Realty	R	TAR

R=REALTOR, DR=Designated REALTOR, MAB=MLS Only Agent, MBB=MLS Only Broker, APR=Appraiser





# New Subscribers

8/1/2020 through 8/31/2020

Raney	Rebecca	Tierra Antigua Realty	R	TAR
Conner	Chad	Oliver Realty, LLC	R	TAR
Steward	Laura	Coldwell Banker Realty	R	GVSAR
Mendenhall	Kayla	Realty Executives Arizona Territory	R	TAR
Sanchez	Amy	Tucson Property Executives LLC	R	TAR
Arias	Andres	Realty One Group Integrity	R	TAR
Huggins	Tyler	Real Estate Direct	R	TAR
Watters	George	Keller Williams Southern Arizona	R	TAR
Ferguson	Dawn	OMNI Homes International	R	TAR
Eckard	Matthew	Long Realty Company	R	TAR
Brown	Aaron	Homesmart Advantage Group	R	TAR
Waldron	Jeanna	Long Realty Company	R	TAR
Wegner	Mary	eXp Realty LLC	R	TAR
Fletcher	Dominic	eXp Realty	R	TAR
Lometti	Blaire	Realty One Group Integrity	R	TAR
English	David	Realty One Group Integrity	R	TAR
Rockwell	Joshua	eXp Realty	R	TAR
Radliff	Jeffrey	Long Realty Company	R	TAR
Xu	Hong	Homesmart Advantage Group	R	TAR
Martinez	Michael	Homesmart Advantage Group	R	TAR
Van Vactor	Scott	United Real Estate Specialists	R	TAR
Solano	Christianna	Realty Executives Arizona Territory	R	TAR
Demas	Chris	Russ Lyon Sotheby's Int Realty	R	TAR
Hardin	Lucas	Arizado Realty	R	TAR
Holmes	Leslie	OMNI Homes International	R	TAR
Auclair	Stephanie	Long Realty Company	R	TAR
Zorrilla	Laura	Long Realty Company	R	TAR
Russell	Michelle	eXp Realty LLC	R	Other
Ellison	Tony	Keller Williams Southern Arizona	R	TAR
Rojas	Stephanie	Keller Williams Southern Arizona	R	TAR
Bolla	Yvette	eXp Realty LLC	R	TAR
Berry	Shui	Coldwell Banker Realty	R	TAR
Kladnick	Linda	Robson Ranch Quail Creek, LLC	R	TAR
Hernandez	Jessica	Homesmart Advantage Group	R	TAR
Rolando	Jacob	Keller Williams Southern Arizona	R	TAR
Castañeda	Alec	Tierra Antigua Realty	R	TAR
Gregson	Todd	Long Realty Company	R	TAR
Sarullo	Michele	NextHome Complete Realty	R	TAR
Garcia	Samuel	Coldwell Banker Realty	R	TAR
Laufmann	Janet	Long Realty Company	R	TAR
Marrero	Chelsea	eXp Realty	R	TAR
Livermore	Breann	Real Estate Direct	R	TAR
Renteria	George	Coldwell Banker Realty	R	TAR
Weed	Patricia	Realty One Group Integrity	R	TAR

R=REALTOR, DR=Designated REALTOR, MAB=MLS Only Agent, MBB=MLS Only Broker, APR=Appraiser



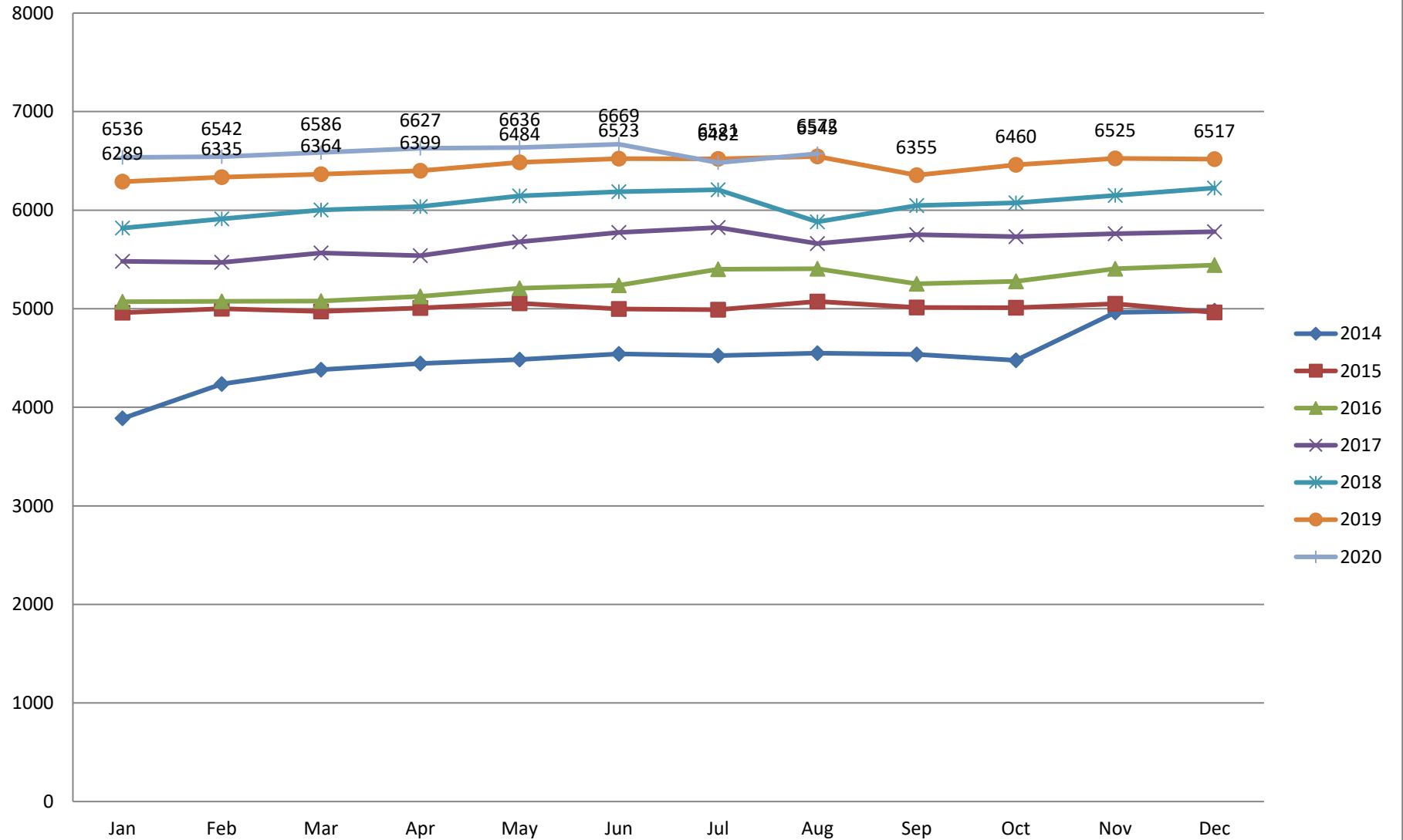
## New Subscribers

8/1/2020 through 8/31/2020

Hart	Priscilla	Oliver Realty, LLC	R	TAR
Weinstein	Brandon	Keller Williams Southern Arizona	R	TAR
McKinney	Audra	Realty One Group Integrity	R	TAR
Cunningham	Autumn	Realty Executives Arizona Territory	R	TAR
Lewis	Laurine	Help-U-Sell/SE Rita Ranch Rlty	R	TAR
Gomez	Manuel	United Real Estate Specialists	R	TAR
Carillo	Rhonda	Keller Williams Southern Arizona	R	TAR
Smyser	Mary	OMNI Homes International	R	TAR
Zarabia	Daisy	Long Realty Company	R	TAR
Jost	Shelly	Long Realty Company	R	TAR
Hashim	Shamam	Realty Executives Arizona Territory	R	TAR
Gonzales	Luis	Realty Executives Arizona Territory	R	TAR
Ruffalo	Angela	Long Realty Company	R	TAR
Miranda	Reymundo	Engel & Volkers Tucson	R	TAR
Ward	David	eXp Realty LLC	R	TAR
Hasman	Michael	Long Realty Company	R	TAR
Skelton	Gerald	Homesmart Advantage Group	R	TAR
Trawick	Emily	My Home Group Real Estate	R	TAR
johnson	Terrence	eXp Realty	R	TAR
Perez Velazquez	Gloria	Coldwell Banker Realty	R	TAR
Ramirez	Bianca	Oliver Realty, LLC	R	TAR
Hohn	Brian	Long Realty Company	R	TAR
Ortega	Pat	Copper Mountain Realty	R	TAR
Mills	Lisa	Copper View Realty, LLC	R	GVSAR

New Subscriber Count - 109

## Membership Trends August 2020



**Active Participants: 900**

# All Residential Properties Market Overview

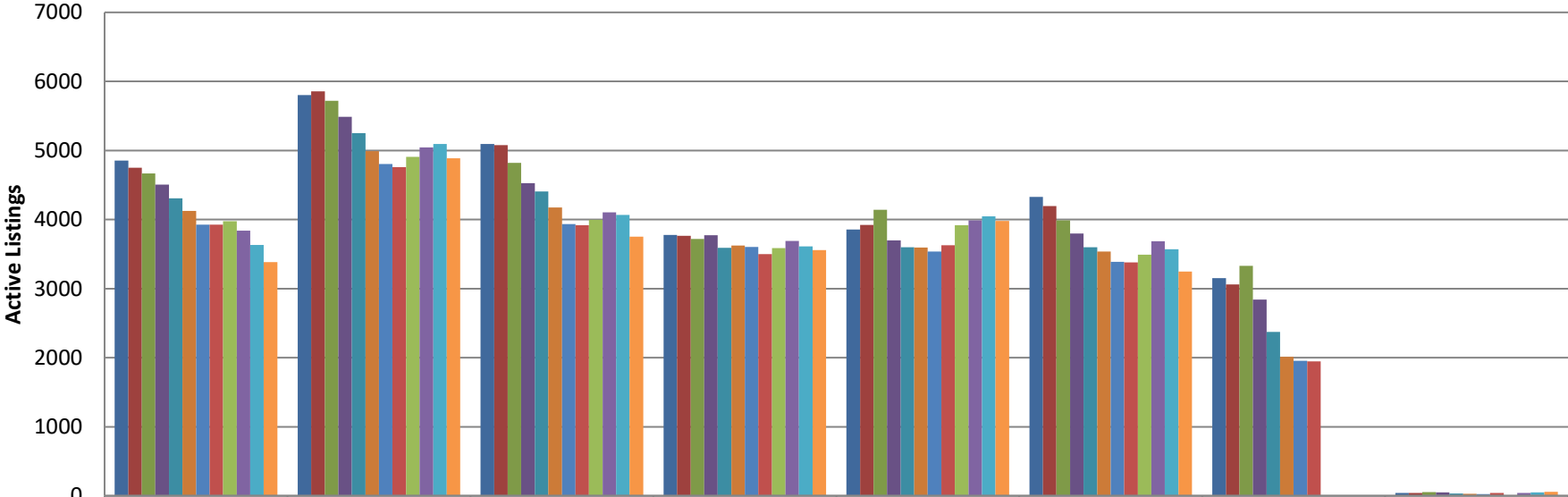
Key metrics by report month and for year-to-date (YTD) starting from the first of the year. Includes all Single Family and Townhome/Condo listings in the MLS.



**MULTIPLE LISTING SERVICE OF  
SOUTHERN ARIZONA**

Key Metrics	Historical Sparkbars	8-2019	8-2020	% Change	YTD 2019	YTD 2020	% Change
<b>New Listings</b>		1,912	<b>1,909</b>	- 0.2%	16,541	<b>15,416</b>	- 6.8%
<b>Pending Sales</b>		1,616	<b>2,061</b>	+ 27.5%	13,754	<b>14,015</b>	+ 1.9%
<b>Closed Sales</b>		1,685	<b>1,608</b>	- 4.6%	13,086	<b>12,697</b>	- 3.0%
<b>Days on Market Until Sale</b>		38	<b>33</b>	- 13.2%	43	<b>37</b>	- 14.0%
<b>Median Sales Price</b>		\$226,000	<b>\$255,000</b>	+ 12.8%	\$225,000	<b>\$245,000</b>	+ 8.9%
<b>Average Sales Price</b>		\$268,374	<b>\$310,572</b>	+ 15.7%	\$265,529	<b>\$288,766</b>	+ 8.8%
<b>Percent of List Price Received</b>		98.5%	<b>99.2%</b>	+ 0.7%	98.3%	<b>98.7%</b>	+ 0.4%
<b>Housing Affordability Index</b>		137	<b>126</b>	- 8.0%	138	<b>131</b>	- 5.1%
<b>Inventory of Homes for Sale</b>		3,410	<b>1,840</b>	- 46.0%	—	—	—
<b>Months Supply of Inventory</b>		2.2	<b>1.1</b>	- 50.0%	—	—	—

# Inventory Trends Aug 2020



	2004	2015	2016	2017	2018	2019	2020	Distressed
Jan	4856	5803	5095	3777	3855	4329	3150	43
Feb	4750	5857	5078	3765	3922	4196	3059	43
Mar	4668	5721	4820	3721	4140	3989	3330	54
Apr	4505	5487	4525	3773	3700	3798	2842	49
May	4307	5250	4408	3589	3601	3598	2371	32
Jun	4123	4992	4175	3624	3593	3538	2012	29
Jul	3926	4803	3936	3602	3536	3388	1956	25
Aug	3927	4758	3919	3500	3627	3381	1946	42
Sep	3976	4909	3996	3587	3918	3493		
Oct	3838	5043	4103	3689	3988	3687		43
Nov	3633	5096	4067	3611	4046	3571		48
Dec	3383	4888	3752	3557	3982	3245		58

\*Beginning January 2016, inventory market area has been adjusted to include the entire MLSSAZ Service Area including Coshise, Graham, and Greenlee counties.

MLSSAZ Programs, Products and Services	Start Date	Timeline	Status	Lead	Budget
<b>Goal #1 Hub of Data, Resources and connections</b>					
<b>Goal #2 Education and Training-Participants and Subscribers</b>					
Create Video and Webinar Library-(Rename-Playlist)					
Organize and define categories	8/1/2020	9/20/2020	in process, several up, organization on going, website	Amy	none
Determine links and access	9/1/2020	9/30/2020	*in process, change to current sites	Amy/Jennifer	none
Determine plan for communication to customers	9/15/2020	10/15/2020		Jennifer	none
Develop "Why they need it" series					
Determine topics for agent to use with buyer and sellers	9/15/2020	10/1/2020		BethAnn/Amy	none
Quick Start Guides					
Determine products needing quick start	6/1/2020	9/20/2020	*Top 5 products selected CCP, CS, Showing time, Stats	BethAnn	none
Develop one page guides	6/1/2020	12/31/2020	CCP-done, Showingtime-done, App video done	BethAnn	\$250 copies
Agent/Brokerage Training					
Determine various segments of Agents/brokerage and needs	9/20/2020	9/30/2020		BethAnn	none
Determine top 5 office needs (ex. Listing transfers, etc)	7/1/2020	9/1/2020	*completed. Training to implement	BethAnn	none
develop education and awareness plan	9/1/2020	10/15/2020	*in process, Training working on plan	BethAnn/Jen	none
Determine top 5 Agent needs	9/1/2020	10/15/2020		BethAnn	none
develop education and awareness plan (Tips and tricks)	9/15/2020	10/30/2020	*in process, Tutorial Tuesday's, additional options	BethAnn/Amy	none
MLS Class 1					
Evaluate delivery and plan during COVID -new agents	6/1/2020	7/1/2020	Training adjusted to zoom and video, completed	BethAnn	none
Develop refresher on-line course-all agents	10/1/2020	10/31/2020		Amy	none
<b>Goal #2 Customer Service</b>					
SUPRA Lock Box support hours					
Adjusted hours for efficiency/covid	6/1/2020	6/30/2020	complete	Amy	none
Tech Support Hours					
Adjust temp hours for Covid/Saturday hours-Future hours	5/1/2020	12/31/2020	complete	Randy	none, in place already
Determine need for expanded hours	8/1/2020	9/30/2020	initial discussion, staffing roles in process*complete	Randy	TBD
Finalize and implement expanded hours pilot program	10/1/2020	10/15/2020	* no adjustment to current hours, add staff, in process	Randy	
Review success and adjust for 2021	12/1/2020	12/15/2020		Randy	
Helpdesk/Tech Support customer service system					
Determine needs and outcome for system	7/1/2020	8/30/2020	in process, 8/20 final team review* completed	Randy	TBD, in process
Review of 5-8 other MLS's	6/1/2020	8/1/2020	*completed, zendesk is top	Christine	
Vendor review	8/1/2020	8/30/2020	in process, 8/20 final team review*completed	Randy/Christine	
Implementation	9/15/2020	10/15/2020	*in process over October	Christine	
Define service delivery needs for region					
ExComm and Board to determine overall plan	8/1/2020	12/1/2020	initial discussion started	Randy	TBD, 2021 plan
<b>Goal #5 Value of MLSSAZ Brand</b>					
<b>Goal #5 Robust Market Reports</b>					
Market Stats review (adoption rates, success, needs for training/promo	10/1/2020	10/30/2020		Randy	none

<b>Data Quality and Technology</b>						
<b>Goal #4 Application of Advanced Technology</b>						
Showing Time review (adoption rates, success, needs for training)	9/1/2020	11/30/2020			Randy/Tech Com	none
Clear Cooperation Policy and Coming Soon review (success, needs)	8/1/2020	12/31/2020	*new workgroup in place, tracking,		Andrew	none
Supra lockbox review (success, needs, training)	7/1/2020	10/31/2020	*completed, training with videos, on site		Amy	none
Active key retirement	7/1/2020	12/31/2020	in process, 530 left to convert, * 410 current		Amy	none
Clariety/CRS Product review	7/1/2020	11/1/2020	July tech review, September for Clariety*now October		Lori/Tech Com	none
<b>Goal #3 Regional integration and Quality of Data</b>						
Regional data integration success review and needs	10/1/2020	11/30/2020			Tech Com/Lori	none
Property Mgmt compliance issues and concerns	8/1/2020	10/30/2020	in process. *Workgroup completed		Andrew/Lori/Exec	none
Compliance-proactive review plan established and executed	7/1/2020	12/31/2020	on going, *Compliance educating/plan needed		Andrew/Standard	none
Profile Sheet review (if needed)	10/1/2020	12/31/2020	*Completed		Tech Com/Lori	TBD
<b>Goal #3 Data Expansion</b>						
Property Mgmt/Rental Property enhancement w/FlexMLS						
Workgroup established	8/10/2020	8/31/2020	*Completed		President/Andrew	none
Review input sheet/Flex fields	8/10/2020	9/30/2020	*Completed		Lori/Tech Com	none
Enhancement to rules and regulations	8/10/2020	11/30/2020	* in process from workgroup		Andrew/Standard	none
<b>Marketing, Communication and Outreach</b>						
Website RFP development						
Workgroup chair and members and liaison determined	7/1/2020	8/1/2020	complete		Jennifer	none
Workgroup Goals and meetings scheduled	7/1/2020	8/30/2020	* Completed		Jennifer	none
Website capabilities, audience, update plan	8/1/2020	9/30/2020	*Completed		Workgroup/Jen	none
Evaluate other Websites (top 5 )	8/1/2020	8/30/2020	*Completed		Workgroup/Jen	none
RFP completed, sent, final company selected	10/1/2020	11/15/2020	*RFP in process		Workgroup/Exec	TBD
<b>Information Delivery Methods</b>						
Texting	10/1/2020	11/30/2020	*Vendors being reviewed		Jennifer	TBD, system?
Develop guidelines of use	10/1/2020	10/30/2020			Jennifer	none
Implement plan for use	11/1/2020	11/30/2020			Jennifer	none
<b>Newsletter</b>						
Template review and frequency determination	7/1/2020	8/30/2020	complete, monthly to all, segments still to go		Jennifer	none
Audience segmentation determined (Participant, Mgr, subscriber)	9/1/2020	9/30/2020			Jennifer	none
Implementation of monthly newsletter	8/1/2020	12/31/2020	first newsletter to drop in August *September		Jennifer	none
Plan and process for each group and each item communicated	9/1/2020	9/30/2020			Jennifer	none
Different subject lines, messages for each group determined	9/1/2020	9/1/2020	*completed but will have adjustments, Bkr, mgr, agent		Jennifer	none
<b>Training Communication Plan</b>						
Determine plan for each audience to communicate Goal #2 efforts	9/1/2020	11/1/2020	* in process, staff trainer in place		Jennifer	none
<b>Organizational Development and Sustainability</b>						
<b>Goal #7 Efficient and Effective Business Model</b>						
VPN/Technology enhancements-for tech support effectiveness	7/1/2020	9/15/2020	updates complete, final phase in process*completed		Brian	\$5000/split with TAR

Server upgrades, wireless enhancements	7/1/2020	8/30/2020	updates complete	Brian	\$5000/split with TAR
IT/Data Audit and security test	9/1/2020	9/30/2020		Randy/Brian	TBD
Business Plan review and adjustments COVID	7/1/2020	8/30/2020	adjustments made, August Board review*completed	Randy	none
Organizational Staff Roles review					
Determine needs and execute additions,changes	7/1/2020	9/30/2020	Review complete, phase 1 of 3 complete*interviewing	Randy	TBD
Staff training Plan					
Cross training plan and execution of plan	9/1/2020	10/31/2020	*in process, Gateway, compliance, training	BethAnn	none
Life of an agent/brokerage series plan and implementation	9/1/2020	10/31/2020	* in process, first office complete, list developed	BethAnn	none
			* MLS contact sheet developed		
<b>Goal #7 Expansion/Growth Strategy</b>					
Analysis of pandemic impact	10/1/2020	12/31/2020		Exec/Board/Randy	none
Plan established based on review of impact	11/1/2020	12/31/2020		Exec/Board/Randy	TBD
<b>Goal #7 Leadership and Governance</b>					
Research changes if needed and complete	9/1/2020	11/30/2020		Exec/Board/Randy	none
<b>Goal #7 Resource Capacity</b>					
Review Reserve requirements and adjustments	7/1/2020	8/31/2020	August Exec meeting/Board*move to October	Randy/Exec	none
Cooperative Agreement review and adjustments	9/1/2020	9/30/2020		Randy/Exec	TBD
2021 Service Center Agreements reviewd, completed	7/1/2020	8/30/2020	SC in process, GV next 8/10/20*GV completed	Randy/Exec	TBD
2021 Budget Planning and adoption	8/1/2020	11/1/2020	*in process, first mtg set, 2nd draft complete	Randy/Exec	none
Billing Cycle Review 2020/21	8/1/2020	8/30/2020	Cycle complete, 97% renewal*completed	Randy/Exec	none
*					

\* New updates added



## Aug 2020 Professional Development and MLSSAZ attendance

Class	Date	Regist	Attendance		
<b>MLSSAZ</b>					
Tierra Antigua	3-Aug	NA	24		
Searching	3-Aug	19 R	12		
Mastering Quick Search	3-Aug	12 R	8		
Mastering Quick Search	4-Aug	8R	3		
Long	4-Aug	NA	15		
Mastering Quick Search	Sat 8/8/2020	13R	8		
Mastering Quick Search	6-Aug	NA	7		
Market Stats	14-Aug	NA	6		
Barbara Mendoza office	18-Aug	3 R	3		
Highlights	25-Aug	8 R	4		
Barbara Mendoza office	27-Aug	3 R	3		
			<b>95</b>		
<b>Members Presented for Consent</b>			<b>25</b>	ZOOM NMO and NAR Ethics online	TAR
<b>MLSSAZ Standard Videos</b>			<b>517</b>		MLSSAZ MLSSAZ
<b>New Member</b>					
NMO	Sat Aug 8th	33 R	15	ZOOM	TAR
NMO	17-Aug	55 R	39	ZOOM	TAR
<b>2 classes</b>			<b>54</b>		
<b>CE offered</b>					
Ethical Business Practices ONLINE	1-Aug	31-Aug	32	9 months to use	The CE Shop
Inspections ONLINE	1-Aug	31-Aug	35	9 months to use	The CE Shop
Any class needed Online	1-Aug	31-Aug	25	Used for immediate need	
Client Communication		5-Aug	55		Course Creators
Mastering The Code	27-Aug		Canceled	2 registrations	Mike Mulvena
Appraisals	24-Aug		21		Glen Smart
<b>Professional Dev</b>			<b>168</b>		
Making Music in A Noisy World	6-Aug	52 R	18		Ashton Gustafson
The BOOM team	20-Aug	41R	17		The Boom Team
Social Media	14-Aug	27R	19		
<b>5 classes</b>			<b>82</b>		
<b>Total classes</b>	<b>22</b>		<b>941</b>	<b>including video</b>	

**Multiple Listing Service of Southern Arizona**  
**Balance Sheet**  
As of August 31, 2020

	8/31/2020	8/31/2019
<b>ASSETS</b>		
<b>Current Assets</b>		
<b>Bank Accounts</b>		
1000 Wells Fargo Operating 0242	1,805,630	1,611,856
5048 Morgan Stanley Investments	1,078,050	1,002,672
<b>Total Bank Accounts</b>	<b>2,882,880</b>	<b>2,614,529</b>
<b>Other Current Assets</b>		
5000 A/R Ramco	8,374	15,424
5001 Cash Receipts	22	
5003 Credit Card Receipts	381	31,142
<b>Total 5000 A/R Ramco</b>	<b>9,447</b>	<b>46,565</b>
5110 Federal Corp Tax Deposit	2,668	40,800
5390 Retail Store Inventory	11,835	9,455
5395 SUPRA Inventory	31,299	94,512
5605 Prepaid Expenses	3,143	504
<b>Total Other Current Assets</b>	<b>58,393</b>	<b>191,837</b>
<b>Total Current Assets</b>	<b>2,941,273</b>	<b>2,806,366</b>
<b>Fixed Assets</b>		
5606 Fixed Asset Software	6,820	
<b>Total Fixed Assets</b>	<b>6,820</b>	
<b>Other Assets</b>		
5610 Intercompany TAR -0234     1	(156,749)	35,379
6015 Intercompany Charitable Foundation -0259		180
6316 Due to PSF (RAPAC)		(7,830)
<b>Total Other Assets</b>	<b>(156,749)</b>	<b>27,729</b>
<b>TOTAL ASSETS</b>	<b>2,791,345</b>	<b>2,834,094</b>
<b>LIABILITIES AND EQUITY</b>		
<b>Liabilities</b>		
<b>Current Liabilities</b>		
<b>Accounts Payable</b>		
6000 Accounts Payable	42,532	61,087
<b>Total Accounts Payable</b>	<b>42,532</b>	<b>61,087</b>
<b>Other Current Liabilities</b>		
6100 Current Sales Tax Collected	(459)	3,297
6200 Accrued Expenses		(5,459)
6265 Taxes Payable	(0)	8,777
6300 Deferred Revenues		
6310 Deferred Agent Fee Income		
6310-2 Deferred Agent Fee 2019-2020		1,496,736
6310-3 Deferred Agent Fee 2020-2021	1,532,044	
<b>Total 6310 Deferred Agent Fee Income</b>	<b>1,532,044</b>	<b>1,496,736</b>
6311 Deferred Sec/PA Fee Income		

**Multiple Listing Service of Southern Arizona**  
**Balance Sheet**  
As of August 31, 2020

	8/31/2020	8/31/2019
6311-2 Deferred Sec/PA Fee 2019-2020		24,572
6311-3 Deferred Sec/PA Fee 2020 - 2021	27,025	
<b>Total 6311 Deferred Sec/PA Fee Income</b>	<b>27,025</b>	<b>24,572</b>
6315 Deferred SUPRA Admin Fees	1,027	(39,965)
6315-0 Deferred Supra Admin Fee - Quarterly	(52,319)	
<b>Total 6315 Deferred SUPRA Admin Fees</b>	<b>(51,292)</b>	<b>(39,965)</b>
<b>Total 6300 Deferred Revenues</b>	<b>1,507,778</b>	<b>1,481,343</b>
<b>Total Other Current Liabilities</b>	<b>1,507,319</b>	<b>1,487,959</b>
<b>Total Current Liabilities</b>	<b>1,549,850</b>	<b>1,549,045</b>
<b>Total Liabilities</b>	<b>1,549,850</b>	<b>1,549,045</b>
<b>Equity</b>		
30000 Opening Balance Equity	647,500	277,500
32000 Retained Earnings	(258,715)	(414,105)
6500 Capital Stock; No Par	11,561	11,561
6510 Paid in Capital	39,876	39,876
6520 Dividends	(559,208)	(184,546)
6538 Designated Net Assets	790,845	1,094,781
Net Income	569,635	459,982
<b>Total Equity</b>	<b>1,241,494</b>	<b>1,285,049</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>2,791,345</b>	<b>2,834,094</b>

1. Intercompany not zeroed out in August.

**Multiple Listing Service of Southern Arizona  
Budget vs. Actuals  
January - August 2020**

	Aug 2020				Total				Annual Budget
	Actual	Budget	over Budget	% of Budget	Actual	Budget	over Budget	% of Budget	
<b>Income</b>									
700001 Relist Fee Income	2,190	1,250	940	175.20%	6,990	10,000	(3,010)	69.90%	15,000
700501 Agent Fees	153,334	157,083	(3,749)	97.61%	1,332,245	1,256,667	75,579	106.01%	1,885,000
701501 Late Fees	4,050	2,917	1,133	138.86%	5,100	23,333	(18,233)	21.86%	35,000
702001 Office Initiation Fees	4,250	2,396	1,854	177.39%	24,250	19,167	5,083	126.52%	28,750
702501 Agent Application Fees	15,975	12,500	3,475	127.80%	94,875	100,000	(5,125)	94.88%	150,000
703001 Secretary/Personal Asst Fees	2,703	2,917	(214)	92.66%	24,665	23,333	1,331	105.71%	35,000
703201 Non-Member Fees		1,438	(1,438)			11,500	(11,500)		17,250
706802 Advertising Income(1)		250	(250)			2,000	(2,000)		3,000
707004 MLS Fines		42	(42)		800	333	467	239.98%	500
723102 IDX Data Feed Income					1,000		1,000		
726002 Revenue Agreements Income	667	750	(83)	88.92%	5,531	6,000	(469)	92.19%	9,000
735003 Retail Store Income	1,506	3,500	(1,994)	43.03%	15,449	28,000	(12,551)	55.17%	42,000
737103 IBox Income	6,490	5,500	990	118.00%	44,110	44,000	110	100.25%	66,000
737503 Administration IBox & Card		250	(250)			2,000	(2,000)		3,000
737801 SUPRA Administration Fee	32,045	15,900	16,145	201.54%	252,960	127,200	125,760	198.87%	190,800
<b>Total Income</b>	<b>223,210</b>	<b>206,692</b>	<b>16,518</b>	<b>107.99%</b>	<b>1,807,975</b>	<b>1,653,533</b>	<b>154,441</b>	<b>109.34%</b>	<b>2,480,300</b>
<b>Cost of Goods Sold</b>									
755005 Retail Store Cost of Sales	1,133	2,500	(1,367)	45.31%	11,522	20,000	(8,478)	57.61%	30,000
864005 IBox Expense	4,868	4,583	284	106.20%	33,083	36,667	(3,584)	90.23%	55,000
<b>Total Cost of Goods Sold</b>	<b>6,001</b>	<b>7,083</b>	<b>(1,083)</b>	<b>84.71%</b>	<b>44,605</b>	<b>56,667</b>	<b>(12,062)</b>	<b>78.71%</b>	<b>85,000</b>
<b>Gross Profit</b>	<b>217,209</b>	<b>199,608</b>	<b>17,601</b>	<b>108.82%</b>	<b>1,763,370</b>	<b>1,596,867</b>	<b>166,503</b>	<b>110.43%</b>	<b>2,395,300</b>
<b>Expenses</b>									
805507 Dues & Subscriptions 1	60		60		652		652		
8070 Staff/Network Education									
807007 Staff Memberships	529	533	(4)	99.22%	4,233	4,267	(33)	99.22%	6,400
807505 Committee Meals & Entertainment		33	(33)		346	267	80	129.91%	400
817508 Credit Card Service Charges	7,429	3,750	3,679	198.11%	46,311	30,000	16,311	154.37%	45,000
818806 Conference Registrations 2							2,692		
818807 MLS Staff Travel		4,167	(4,167)		3,301	33,333	(30,033)	9.90%	50,000
831006 MLS Comp User Paymts	37,835	37,375	460	101.23%	303,922	299,000	4,922	101.65%	448,500
833006 Public Records Data	14,945	15,191	(246)	98.38%	106,696	121,528	(14,832)	87.80%	182,292
835806 Clarity Security Systems	11,160	10,561	599	105.68%	87,711	84,488	3,223	103.81%	126,732
836006 Showing Time/Statistics Program 3	13,256	5,850	7,406	226.59%	58,193	46,800	11,393	124.34%	70,200
836506 Current Software Improvements		833	(833)		608	6,667	(6,059)	9.11%	10,000
837006 Web Site Redesign		1,667	(1,667)			13,333	(13,333)		20,000
844008 Legal Expense	189	1,167	(978)	16.20%	13,189	9,333	3,856	141.31%	14,000
844608 Bank Fees	779	667	112	116.86%	5,696	5,333	362	106.80%	8,000
846508 Accounting Expense(1)		2,103	(2,103)			16,827	(16,827)		25,240
856510 MLS Business Planning		750	(750)		2,813	6,000	(3,187)	46.88%	9,000
880011 Community Donations		833	(833)		10,000	6,667	3,333	150.00%	10,000
880012 RAPAC Donations									
885011 Misc Expense		167	(167)		3,998	1,333	2,665	299.84%	2,000
886009 GV Service Center Expense	3,430	3,430		100.00%	27,440	27,440		100.00%	41,160
886109 GV Supra Disbursement	3,760	1,405	2,355	267.60%	11,178	11,240	(62)	99.45%	16,860
887009 SC Service Center Expense	2,350	2,350		100.00%	18,800	18,800		100.00%	28,200
887109 SC Supra Disbursement	1,214	520	694	233.45%	3,642	4,160	(518)	87.54%	6,240
900209 TAR Cooperative Agreement	70,275	83,333	(13,058)	84.33%	512,088	666,667	(154,579)	76.81%	1,000,000
901010 Regionalization Expenses(1)		2,083	(2,083)			16,667	(16,667)		25,000
901410 Phone App Development		2,083	(2,083)			16,667	(16,667)		25,000
901610 Broker/Participant Meetings		333	(333)			2,667	(2,667)		4,000
901810 MLSSpecific Marketing		417	(417)			3,333	(3,333)		5,000
BOD Travel		1,383	(1,383)			11,067	(11,067)		16,600
<b>Total Expenses</b>	<b>167,211</b>	<b>182,985</b>	<b>(15,774)</b>	<b>91.38%</b>	<b>1,223,507</b>	<b>1,463,883</b>	<b>(240,376)</b>	<b>83.58%</b>	<b>2,195,824</b>
<b>Net Operating Income</b>	<b>49,998</b>	<b>16,623</b>	<b>33,375</b>	<b>300.78%</b>	<b>539,863</b>	<b>132,984</b>	<b>406,879</b>	<b>405.96%</b>	<b>199,476</b>
<b>Other Income</b>									
740004 Operating Interest Income	634		634		6,330		6,330		
744504 Unrealized Gain/(Loss) on Inve	30,264	2,000	28,264	1513.19%	24,685	16,000	8,685	154.28%	24,000
<b>Total Other Income</b>	<b>30,898</b>	<b>2,000</b>	<b>28,898</b>	<b>1544.89%</b>	<b>31,015</b>	<b>16,000</b>	<b>15,015</b>	<b>193.84%</b>	<b>24,000</b>
<b>Other Expenses</b>									
870560 Interest, Penalty on Taxes	1,243		1,243		1,243		1,243		
900008 Income Tax Expense(1)		5,833	(5,833)			46,667	(46,667)		70,000
<b>Total Other Expenses</b>	<b>1,243</b>	<b>5,833</b>	<b>(4,590)</b>	<b>21.31%</b>	<b>1,243</b>	<b>46,667</b>	<b>(45,424)</b>	<b>2.66%</b>	<b>70,000</b>
<b>Net Other Income</b>	<b>29,655</b>	<b>(3,833)</b>	<b>33,488</b>	<b>-773.60%</b>	<b>29,772</b>	<b>(30,667)</b>	<b>60,438</b>	<b>-97.08%</b>	<b>(46,000)</b>
<b>Net Income</b>	<b>79,653</b>	<b>12,790</b>	<b>66,863</b>	<b>622.79%</b>	<b>569,635</b>	<b>102,318</b>	<b>467,317</b>	<b>556.73%</b>	<b>153,476</b>

1 New Category-removed from Staff Memberships

2 New Category-removed from Staff Travel

3. Working to fix w/Showing Time. Did not budget for Showing Service

**Multiple Listing Service of Southern Arizona  
Equity and Reserve**

	<b>Net Income YTD</b>	<b>Equity</b>	<b>Current Assets</b>	<b>Due to/from</b>	<b>Current Liabilities</b>	<b>Cash Reserve</b>	<b>Annual Operating Expenses</b>	<b>Month of Reserve</b>	<b>6-months</b>	<b>Excess</b>
<b>12/31/2017</b>	182,663	634,631	1,601,942	27,106	994,417	634,631	1,494,097	<b>5.1</b>	747,049	<b>(112,417)</b>
<b>12/31/2018</b>	374,982	825,067	1,868,909	(15,564)	1,028,458	824,887	1,538,777	<b>6.4</b>	769,389	<b>55,499</b>
<b>12/31/2019</b>	559,208	1,231,067	2,401,107	42,559	1,212,599	1,231,067	1,747,324	<b>8.5</b>	873,662	<b>357,405</b>
<b>1/31/2020</b>	82,808	1,313,875	2,303,790	(26,149)	963,766	1,313,875	1,747,324	<b>9.0</b>	873,662	<b>440,213</b>
<b>2/29/2020</b>	114,003	1,345,070	2,201,037	(70,612)	785,355	1,345,070	1,747,324	<b>9.2</b>	873,662	<b>471,408</b>
<b>3/31/2020</b>	81,461	1,312,528	2,035,903	(72,464)	650,910	1,312,528	1,747,324	<b>9.0</b>	873,662	<b>438,866</b>
<b>4/30/2020</b>	208,943	1,440,010	1,953,465	(49,686)	463,769	1,440,010	1,747,324	<b>9.9</b>	873,662	<b>566,348</b>
<b>5/31/2020</b>	328,728	1,559,795	2,094,262	(54,204)	487,083	1,552,975	1,747,324	<b>10.7</b>	873,662	<b>679,313</b>
<b>6/30/2020</b>	432,600	1,104,460	1,814,005	(28,951)	687,414	1,097,640	1,747,324	<b>7.5</b>	873,662	<b>223,978</b>
<b>7/31/2020</b>	485,332	1,157,191	2,890,714	(93,469)	1,646,875	1,150,371	1,747,324	<b>7.9</b>	873,662	<b>276,709</b>
<b>8/31/2020</b>	569,635	1,241,494	2,941,273	(156,749)	1,549,850	1,234,674	1,747,324	<b>8.5</b>	873,662	<b>361,012</b>

**SCCBR Revised 2021  
Service Center Budget**

Category	Expense	Notes	Fee	Frequency	Total
Rent	Office Space	800 sqft	\$800	12	\$9,600.00
	Maintenance	0			
Utilities	Electric		50% \$25	12	\$300.00
Staffing	Employee	12 hrs @ \$19	\$228	52	\$11,856.00
Other	Copiers		50% \$100	12	\$1,200
	Office Supplies		\$30	12	\$360
	Technology	Upgrades-Maintenance	\$300	1	\$300
	Phone/ Internet		50% \$115	12	\$1,380
					\$24,996.00

## Christine Sanchez

---

**From:** Randy Rogers  
**Sent:** Monday, September 14, 2020 4:50 PM  
**To:** Christine Sanchez  
**Subject:** FW: SCCBR Revised 2021 Budget and recommendation for changes to Regional Advisory Council  
**Attachments:** MLSSAZ Service Center 2021 Budget. SCCBR final.pdf

---

**From:** Santa Cruz County Board of REALTORS® <sccazrealtor@gmail.com>  
**Sent:** Friday, September 11, 2020 3:05 PM  
**To:** Randy Rogers <randy@tucsonrealtors.org>  
**Cc:** Yvette Palmer <ypalmer11@gmail.com>  
**Subject:** SCCBR Revised 2021 Budget and recommendation for changes to Regional Advisory Council

Randy,

Attached is the revised SCCBR Service Center budget for 2021 we are submitting for consideration by your Executive Committee and Board of Directors.

We would like to recommend the following language be added to the MLSSAZ Bylaws, Article XI. Committees, Section 3 (B)

Section 3. Standing Committees and Regional Advisory Council.

(B) Regional Advisory Council. The purpose of the Regional Advisory Council is to discuss issues and concerns affecting the MLSSAZ service areas for consideration prior to MLSSAZ Executive Committee review. The council will be composed of at least two (2) and not more than four (4) representatives from each of the associations participating in MLS. Each association will appoint their representatives and provide notice to the MLS of Southern Arizona. Regional Advisory Council will meet quarterly in person or by electronic meeting. The Agendas will be provided to attendees at least one week prior to the meeting.

The SCCBR representatives on the Regional Advisory Council will be Dora Dexter and Aracely Stout. In case we need a backup if someone is unable to attend, it will be Diana Corrales.

Marybeth Hughes  
Executive Officer  
Santa Cruz County Board of REALTORS®  
[Email](#) | (520) 377-9613

[Coronavirus](#) | [Facebook](#) | [REALTOR® Center](#) | [US Census](#)  
NAR Hotline: (800) 874-6500 | AAR Relief Hotline ( 833) 431-4636

## Christine Sanchez

---

**From:** Randy Rogers  
**Sent:** Monday, September 14, 2020 4:49 PM  
**To:** Christine Sanchez  
**Subject:** FW: Santa Cruz Kick-off Meeting

---

**From:** Yvette M. Palmer <[ypalmer11@gmail.com](mailto:ypalmer11@gmail.com)>  
**Sent:** Thursday, September 10, 2020 9:20 PM  
**To:** Chelsea Oakland <[chelseao@armls.com](mailto:chelseao@armls.com)>; Marybeth Hughes <[sccazrealtor@gmail.com](mailto:sccazrealtor@gmail.com)>; Randy Rogers <[randy@tucsonrealtors.org](mailto:randy@tucsonrealtors.org)>; Kari Kuyper <[karik@armls.com](mailto:karik@armls.com)>  
**Subject:** Re: Santa Cruz Kick-off Meeting

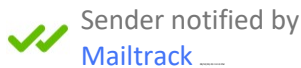
Hi Chelsea,

Per our conversation, we currently have the following active # of listings in the MLS:

Residential - 151  
Rental - 2  
Multi-Dwelling - 2  
Commercial Sale - 17  
Commercial Lease - 6  
Vacant Land - 526

Kind Regards,

Yvette Palmer



On Thu, Sep 10, 2020 at 2:46 PM Chelsea Oakland <[chelseao@armls.com](mailto:chelseao@armls.com)> wrote:

Thank you all for attending the meeting today. We are very excited to begin the project and with all the unknowns, we seem to have a good path to get started. I have attached our outline of the main project objectives. We will continue to update this document as the project evolves.

Roger – I look forward to seeing your timeline you have worked out. Let's connect after the 15<sup>th</sup> to discuss the member entry process.

Yvette – Thanks for offering to send over the listing stats. This will give us some good insight.



I am sure I will be in touch with each of you for questions and updates. Please feel free to do the same. My cell number is best – 412-512-0925.

I look forward to working with you!

Thanks again,

Chelsea

---

**Chelsea Oakland**  
**SR. Content Specialist**



Arizona Regional Multiple Listing Service, Inc.

130 S. Priest Drive Suite 101 Tempe, AZ 85281-2593

(O) 480-303-7022

[ChelseaO@ARMLS.com](mailto:ChelseaO@ARMLS.com)

[ARMLS.com](http://ARMLS.com)



*This message and any attachments are for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply email and destroy all copies of the original message. Thank you.*

--

Kind Regards,

Yvette M. Palmer, REALTOR®  
Associate Broker, SFR, SRES

AGAVE PREMIER PROPERTIES  
1821 N. Mastick Way, Suite #3, Nogales, AZ 85621



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

**Committee:** MLSSAZ Standards  
**Meeting Date:** September 9, 2020  
**Chair:** Sterling Bancroft  
**Called to order:** 1:34 PM

**Present:** Sterling Bancroft, Henry Zipf, Annie Barmore, Amanda Elmer, Patrick Devine, Mindy Maddock, Michele Ream, Michael Smith, Lisa Sullivan  
**Absent:** Shiraz-ali Peera, Jacob Freidman  
**Staff:** Andrew Castillo  
**Guests:** Nicole Brule-Fisher

## Action Items:

**M/S/C:** Move to recommend adding to listing agreement a seller acknowledgement for the capturing of video & images during showings.

**M/S/C:** Move to recommend increasing the minimum fine for the failure to follow showing instruction to \$150.00

## Information Items:

- Meeting was held via video conference.
- Sterling Bancroft Chairman chaired this meeting.
- Minutes of the August meeting were approved.
- Unfinished Business – The committee discussed the addition of a seller acknowledgement to the listing agreement for the taking of video & images by third parties involved with the property transaction.
  - Based off the recommendations from the Standards Committee, MLS staff drafted language for a third-party video & images seller acknowledgement. The following language has been reviewed, edited, and recommended by the Standards Committee to be added to the listing agreement.
    - Seller acknowledges third parties such as MLSSAZ members & participants, potential buyers, appraisers, inspectors, and others cooperating as part of the sale or exchange of the property may take photos and videos of the premises  
\_\_\_\_/\_\_\_\_Seller/Seller Initials
- The committee discussed the schedule of fines.
  - Due to the seriousness involving violations of the showing instructions the Standards Committee recommends the minimum fine for failure to follow the listing showing instructions to be increased from \$50.00 to \$150.00
  - It was discussed adding a fine for failure to submit requested listing documentation to the MLS. A fine will establish an additional incentive to submit documentation to the MLS for the purposes of discovery & auditing listings. MLS Staff will draft language for Standards consideration.
- It was discussed allowing watermarked photos to be submitted to the MLS.
  - To help mitigate fraud committed by copying listing photos submitted to the MLS, it was discussed to allow non-branded generic text watermarked photos (I.e. This property is not for rent.) Limitations on colors and font was also discussed. MLS staff will contact FlexMLS to find if the service has any watermark options available. Watermarked photo examples were also requested. This is an unfinished business item to be continued in October's meeting.

Adjourned @ 3:06 PM

**Our next meeting is October 14, 2020 at 1:30 PM**



# MULTIPLE LISTING SERVICE OF SOUTHERN ARIZONA

## MEETING REPORT

---

---

**Committee:** 2020 Technology

**Meeting Date:** September 1, 2020

**Chair:** Cathy Wolfson

**Called to order at:** 2:34pm

**Attendance:** Kelly Hand                      Jennie James                      Dawn Heinemann  
Laurie Lundeen                      Brad Sensenbach                      Cathy Wolfson  
Henry Zipf

**Absent:** Rebecca Crane                      Ronald Keeler

**Staff:** Lori Wadsack                      Randy Rogers

**Guest(s):** Ginny Huffman

### Action Items:

**M/S/C:** Move to approve Meeting Report of August 4, 2020.

**M/S/:** Move to add new quick search template (Residential Expanded) as presented and make it available to all membership.

**M/S/C:** Amend the motion for fields after # of Garage Spaces to be in alphabetical order. Fields before are most searched for and should remain as they currently are.

**M/S/C:** Original motion as amended.

### Information Items:

- Ginny Huffman gave an update on items the MLS Rental Listing Workgroup have been discussing. That is chaired by Steve Schultz.
- Randy Rogers gave an update on the re-opening of TAR/MLSSAZ offices and COVID-19.
- Discussed the style of future meetings, whether they be full Zoom, hybrid meetings, in-person once a quarter, etc.

**Adjourned:** The meeting was adjourned at 3:22pm.

## AAR Request

The National Association of REALTORS® Advocacy Group, led by Bill Malkasian, is collaborating on a joint program with State Associations and RPR to create a Housing Report of market activity, at both U.S. Congressional District and statewide U.S. Senate levels. NAR will use this as a resource for policy and advocacy activities before Congress. The up-to-date, targeted information will allow NAR staff and FPCs to provide real-time examples of market activity, helping to enhance NAR's policy positions and priorities.

The targeted audience is Members of the U.S. Senate, House of Representatives, their in-district and DC staff and Congressional Leadership and Committee staff.

The proof of concept for the project started with the Wisconsin REALTORS® Association, who collaborated with NAR Advocacy and RPR to develop a prototype.

Arizona REALTORS® is excited about this project because it tailors our advocacy efforts to the elected official we are engaging and offers them in-depth market data specific to their district.

The RPR license agreements do not currently allow RPR to use the MLS data for this report, and State Associations are responsible to obtain authorization from each MLS in their state. **Neither State Association staff nor NAR will have access to view or download MLS data from RPR. The Housing Report will display only aggregated statistical data.**

The process for giving Arizona REALTORS® and NAR permission is simple and requires only an email authorization from your MLS. **To authorize access, please reply "Permission Granted" to this email:**

The Arizona REALTORS® and the NAR Advocacy team seek access to the Lake Havasu Association of REALTORS® statistical data for the purpose of generating Housing Reports, to be used by the Arizona REALTORS® and the National Association of REALTORS® to further advocacy efforts on both state and federal levels.



## Easy-to-generate report using the RPR website

Select permitted users, such as State Association and NAR staff, can set up and generate a customized report in five minutes or less within RPR's Association dashboard.

The **Housing Report** request page walks the user through simple steps.

The screenshot shows the RPR website interface for generating a Housing Report. The page is titled "Congressional District Report" and includes a "REPORT SETUP" sidebar with seven numbered steps. The main content area displays a map of Wisconsin and a table of housing statistics for Congressional District 1.

**REPORT SETUP**

- Pick your report type**: Congressional District (selected), State
- Include Legislator's Name?**: Yes (selected), No
- What month do you need?**: June 2020 (selected)
- Which map do you want?**: Listings (selected), Sales, Median Sales Price
- Who are you emailing it to?**: Me [agent@metorealty.com] (checked), Others
- Include presented by info?**: Someone else (selected), Me
- Include contact for more info?**: Janet Dohoney (selected)

**CONGRESSIONAL DISTRICT REPORT**

WRA Wisconsin REALTORS® Association

Housing Report: Wisconsin Congressional District 1 - Dec. 2019 Honorable Bryan Stell (R)

**STATISTICS:**

- LISTINGS: 1,456 (up from 1,374)
- SALES: 1,032 (down from 1,193)
- PRICE RANGE: \$234,567 (up from \$229K)
- INVENTORY: 7.2 months (down from 6.7 months)
- YOY change: 2.7% (Listings), -2.7% (Sales), 1.5% (Price Range), 3.1% (Inventory)

**PRICE RANGE STATISTICS:**

Price Range	Count	YoY Change
\$125,000 - \$174,999	525	1,599
\$175,000 - \$224,999	276	3,802
\$225,000 - \$274,999	186	3,721
\$275,000 - \$324,999	105	1,144
\$325,000 - \$374,999	234	2,213
\$375,000 - \$424,999	154	2,365
\$425,000 - \$474,999	39	128
\$475,000 - \$524,999	17	12
\$525,000 - \$574,999	26	102
\$575,000 and up	4	24

**YOUR PROFILE INFO:** Sarah Shutterfield, Second Street, 1428 Local Way, Burlington, Wisconsin. Email: sarah@metorealty.com

**MY REPORTS:** Wisconsin: 1st Cong. Dist. Housing Report - Rep. Bryan Stell (1/2/2020), Wisconsin: Housing Report - Rep. Janet Smith... (1/2/2020 3:41 PM), Wisconsin: Housing Report - Rep. David Edwards... (1/2/2020 3:41 PM)

Create a report for a Congressional District or the entire State

Pick the most recent completed month, or an earlier month

Control the contact name or names that appear on the report

The staff member's RPR profile info transfers to the report

Status of all recent reports is displayed

Sneak preview helps visualize the requested report

Interested? Email us to sign up or for more info

housingreport@narrpr.com

## NAR Housing Report Program Overview

NAR's Advocacy Group is partnering on a joint program with State Associations and Realtors Property Resource (RPR) to create a summary report of market activity, at both U.S. Congressional District and statewide U.S. Senate level.

The purpose of the program is to create a new one-page Housing Report. Updated monthly, this report will utilize housing data, organized and delivered by either State Association or NAR Advocacy staff.

- *How will the NAR Advocacy team use this report?*
  - *Answer: NAR will use this as a resource for policy and advocacy activities before Congress. The up-to-date, targeted information allows NAR staff to provide real-time examples of market activity, helping to enhance our policy positions and priorities.*
- *Why is this report valuable to NAR?*
  - *Answer: The reports allow NAR to lead the industry in providing timely and detailed answers to the key question asked by Members of Congress.. "What's the market like in my district?"*
  - *Providing these reports to Congress on a regular basis will establish NAR as the primary resource for access to housing market information in Washington DC.*
- *How will NAR collaborate with State Association Staff?*
  - *Answer: The reports can be accessed by the Legislative Advocacy team, the Political Representatives, FPCs, and State Association staff to use as they meet and contact Members of Congress and staff.*
  - *The Legislative Advocacy team will coordinate regular distribution to DC Congressional offices.*
  - *FPCs will be encouraged to share each time they meet with their Member of Congress and be reminded when the newest reports are available through the FPC newsletter.*
- *Who will be the target audience for this (in-district/state, on the Hill?)*
  - *Answer: The targeted audience is Members of the U.S. Senate, House of Representatives, their in-district and DC staff as well and Congressional Leadership and Committee staff.*
- *Will the NAR Advocacy team refer any market data specific questions back to the state?*

- *Answer: Yes, the Political Representative team will coordinate with State Association Staff as questions arise.*
- *Who is the point of contact at NAR for any questions?*
  - *Answer: Helen Devlin [hdevlin@realtors.org](mailto:hdevlin@realtors.org) 202/383-7559*

To participate in the program, State Associations will be responsible to obtain authorization from each MLS in their state for the data the MLS currently license to RPR to be used for this report. RPR will assist in this process.

The proof of concept for the project started with the Wisconsin REALTORS® Association, who collaborated with NAR Advocacy and RPR to develop the prototype. This was expanded to include input from additional State Associations. The final report templates are being shared with this document.



## Timely real estate statistics, delivered at market level

A new report built by NAR Advocacy and RPR® delivers fast facts to legislators and staff. The Housing Report positions REALTORS® as the **source of housing market metrics**.

The **Congressional District** version shows key indicators in a clear and easily consumed format.

State Association and NAR branding

Configure the right map for the audience: show Sales Price, Listings or Inventory

At a glance, understand where your market is **trending** this month, and see how that compares to previous years

The **district's representative** in Congress or Senate can be displayed

Quickly see changes at all market levels in **price range tables**

Easily add or edit your **contact info**

NATIONAL ASSOCIATION OF REALTORS®
 WRA Wisconsin REALTORS® Association

### HOUSING REPORT

Wisconsin Congressional District 1 - Dec. 2019  
Honorable Bryan Steil (R)

**MEDIAN SALES PRICE by Census Tract**

Color scale: \$62K (purple) to \$536K (red)

**LISTINGS**

Up from previous month ↑

District: **1,456**  
State: **3,800**

12/18	12/17	12/16
1,374	1,293	1,293

YOY change ↑ **2.7%**

**SALES**

Down from previous month ↓

District: **1,032**  
State: **5,835**

12/18	12/17	12/16
\$230K	1,274	1,193

YOY change ↓ **2.7%**

**MEDIAN SALES PRICE**

Up from previous month ↑

District: **\$234,567**  
State: **\$175,000**

12/18	12/17	12/16
\$230K	\$229K	\$226K

YOY change ↑ **1.5%**

**INVENTORY**

Buyer's market 💰

District: **7.2 months**  
State: **6.7 months**

6 months = Balanced market

YOY change ↑ **3.1%**

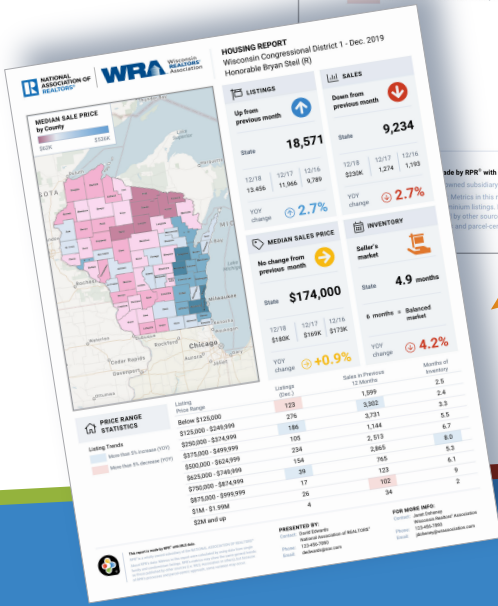
**PRICE RANGE STATISTICS**

Listing Price Range	Listings (Dec.)	Sales in Previous 12 Months	Months of Inventory
Below \$125,000	123	1,599	2.5
\$125,000 - \$249,999	276	3,302	2.4
\$250,000 - \$374,999	186	3,731	3.3
\$375,000 - \$499,999	105	1,144	5.5
\$500,000 - \$624,999	234	2,513	6.7
\$625,000 - \$749,999	154	2,865	8.0
\$750,000 - \$874,999	39	765	5.3
\$875,000 - \$999,999	17	123	6.1
\$1M - \$1.99M	26	102	9
\$2M and up	4	34	2

Listing Trends: ■ More than 5% increase (YOY) ■ More than 5% decrease (YOY)

PRESENTED BY: David Edwards  
National Association of REALTORS®  
Phone: 123-456-7890  
Email: dedwards@nar.com

FOR MORE INFO: Janet Doherty  
Wisconsin Realtors' Association  
Phone: 123-456-7890  
Email: jdoherty@wrasassociation.com



Switch to a **Statewide** version for a larger view of the same analysis

Interested? Email us to sign up or for more info

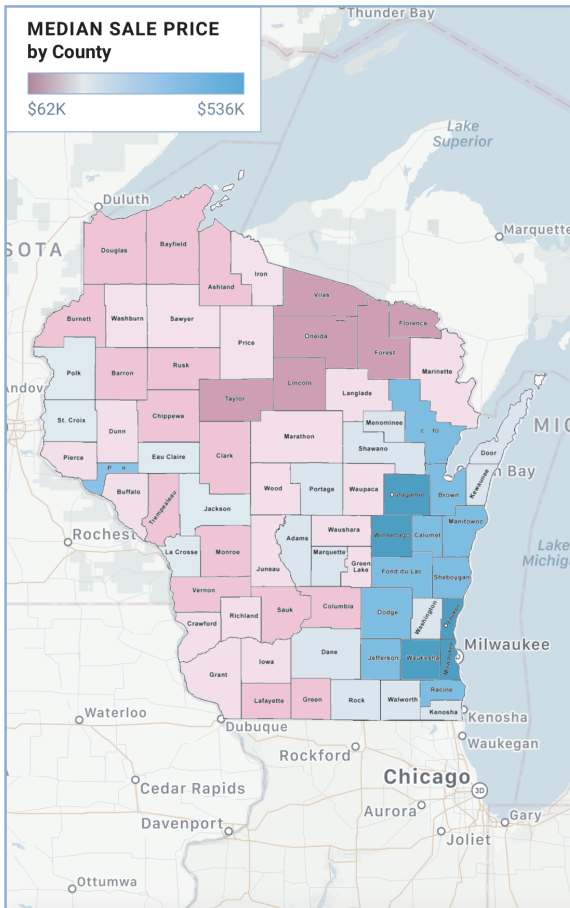
✉ [housingreport@narrpr.com](mailto:housingreport@narrpr.com)





## HOUSING REPORT

Wisconsin - Dec. 2019  
Hon. Tammy Baldwin (D)



### LISTINGS

Up from previous month

State **18,571**

12/18	12/17	12/16
13,456	11,966	9,789

YOY change **2.7%**

### SALES

Down from previous month

State **9,234**

12/18	12/17	12/16
\$230K	1,274	1,193

YOY change **2.7%**

### MEDIAN SALES PRICE

No change from previous month

State **\$174,000**

12/18	12/17	12/16
\$180K	\$169K	\$173K

YOY change **+0.9%**

### INVENTORY

Seller's market

State **4.9 months**

6 months = Balanced market

YOY change **4.2%**

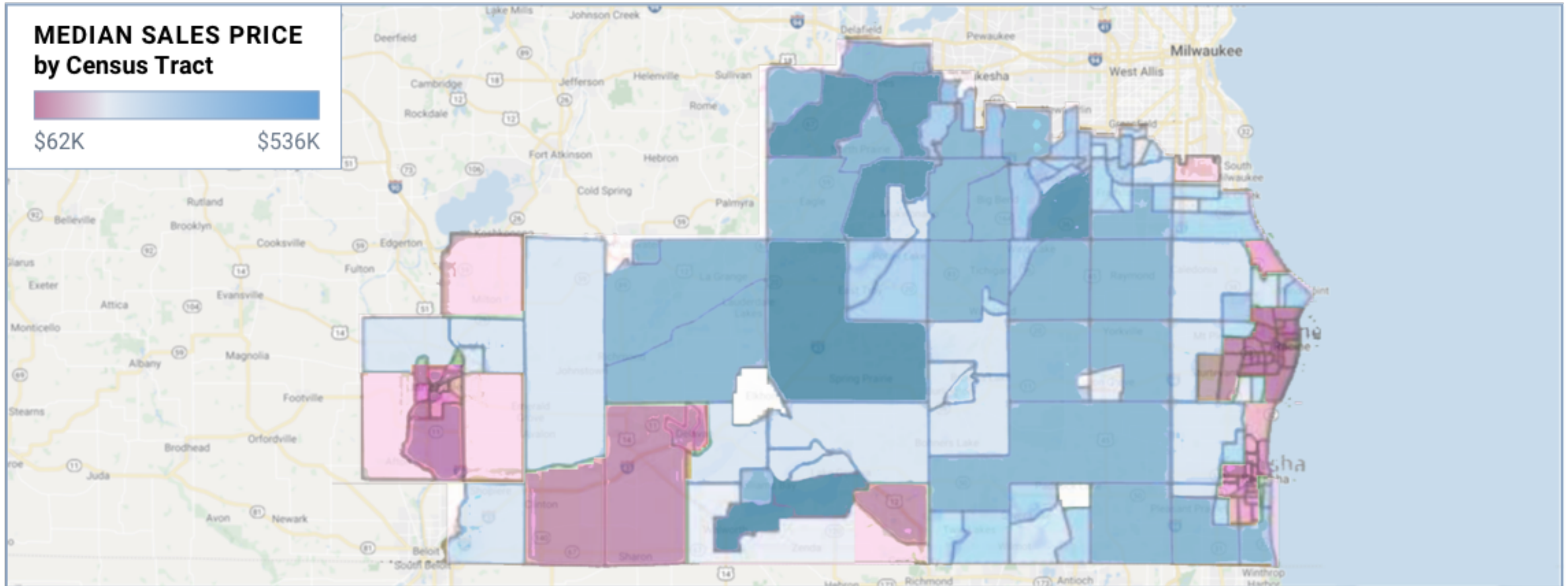
PRICE RANGE STATISTICS	Listing Price Range	Listings (Dec.)	Sales in Previous 12 Months	Months of Inventory
Listing Trends	Below \$125,000	123	1,599	2.5
	\$125,000 - \$249,999	276	3,302	2.4
	\$250,000 - \$374,999	186	3,731	3.3
	\$375,000 - \$499,999	105	1,144	5.5
	\$500,000 - \$624,999	234	2,513	6.7
	\$625,000 - \$749,999	154	2,865	8.0
	\$750,000 - \$874,999	39	765	5.3
	\$875,000 - \$999,999	17	123	6.1
	\$1M - \$1.99M	26	102	9
	\$2M and up	4	34	2

This report is made by RPR® with MLS data. RPR® is a wholly owned subsidiary of the NATIONAL ASSOCIATION OF REALTORS®. About RPR's data: Metrics in this report were calculated by using data from single family and condominium listings. RPR's metrics may show the same general trends as those published by other sources (i.e. MLS, Association or others), but because of RPR's processes and parcel-centric approach, some variation may occur.

**PRESENTED BY:**  
Contact: David Edwards  
National Association of REALTORS®  
Phone: 123-456-7890  
Email: dedwards@nar.com

**FOR MORE INFO:**  
Contact: Janet Doheny  
Wisconsin Realtors® Association  
Phone: 123-456-7890  
Email: jdoheny@wrassociation.com

Interested? Email us to sign up or for more info  
 [housingreport@narrpr.com](mailto:housingreport@narrpr.com)



### LISTINGS

Up from previous month

District **1,456**

State **3,800**

12/18	12/17	12/16
1,374	1,293	1,293

YOY change **2.7%**

### SALES

Down from previous month

District **1,032**

State **5,835**

12/18	12/17	12/16
\$230K	1,274	1,193

YOY change **2.7%**

### MEDIAN SALES PRICE

Up from previous month

District **\$234,567**

State **\$175,000**

12/18	12/17	12/16
\$230K	\$229K	\$226K

YOY change **1.5%**

### INVENTORY

Buyer's market

District **7.2 months**

State **6.7 months**

6 months = Balanced market

YOY change **3.1%**

### PRICE RANGE STATISTICS

Sales Trends

- More than 5% increase (YOY)
- More than 5% decrease (YOY)

Sales Price Range	Sales (Dec.)	Sales in Previous 12 Months	Months of Inventory
Below \$124,999	123	1,599	2.5
\$125,000 - \$249,999	276	3,302	2.4
\$250,000 - \$374,999	186	3,731	3.3
\$375,000 - \$499,999	105	1,144	5.5
\$500,000 - \$624,999	234	2,513	6.7
\$625,000 - \$749,999	154	2,865	8.0
\$750,000 - \$874,999	39	765	5.3
\$875,000 - \$999,999	17	123	6.1
\$1M - \$1.99M	26	102	9
\$2M and up	4	34	2



This report is made by RPR® with MLS data. RPR® is a wholly owned subsidiary of the NATIONAL ASSOCIATION OF REALTORS®. About RPR's data: Metrics in this report were calculated by using data from single family and condominium listings. RPR's metrics may show the same general trends as those published by other sources (i.e. MLS, Association or others), but because of RPR's processes and parcel-centric approach, some variation may occur.

**PRESENTED BY:**  
**Contact:** David Edwards  
 National Association of REALTORS®  
**Phone:** 123-456-7890  
**Email:** jdoheny@nar.com

**FOR MORE INFO:**  
**Contact:** Janet Doheny  
 Wisconsin Realtors® Association  
**Phone:** 123-456-7890  
**Email:** dedwards@wrassociation.com