Arizona Association of REALTORS®
Professional & Business Development Committee
October 21, 2013
Agenda

I. Call to Order – Chairman Hibler

II. Approval of August 7 2013 minutes Page 1

II. Measureable Objectives Update Page 4

III. Education Programs Update/Overview
- A. GRI Workgroup Update - Gary Nelson handout
- B. Broker University: broker survey Page 22
- C. Industry Partners Conference – Frank Dickens/Laura Kovacs Page 23
- D. Leadership Conference Page 30
- E. Remote Delivery Page 31

IV. Communication Products – Bethany Helvie
- A. 2013 Communication Vehicle Stats handout
- B. Website Phase 2 Update
- C. Other

V. General discussion
- A. How do we get more people to use www.REteach.us
- B. What makes the rCRMS classes different than typical c/e classes?
- C. ADRE stats Page 32
- D. 2014 Business Plans
- E. Other

VI. Future Meetings

VII. Adjourn

Arizona Association of REALTORS
Professional & Business Development Committee
August 7, 2013
Minutes

The meeting was called to order by Chairman Hibler at 1:26 pm. A quorum was present.

Present	**Staff**
Larry Hibler, Chair	Barbara Freestone
Gary Fenton	Brittni Matt
Gary Nelson	Laura Kovacs
Pamela Fresdt	Kimberly Franzen
Frank Dickens	
Evan Fuchs (phone)	
Lori Doerfler (phone)	
Sindy Ready	
Paula Monthofer (phone)	
Holly Mabery (Exec Committee Liaison)	

Minutes: The minutes of May 6 were approved noting Paula Monthofer was present at the May meeting.

Measureable Objective Update was provided by Barb.

Updates from the July Instructor Summit were given by Laura.

GRI Update was provided by Gary Nelson
MOTION: Made, seconded and carried to approve the revisions as presented to the GRI Faculty Criteria and New Instructor Procedure.

MOTION: Made, seconded and carried to ratify the actions taken by the GRI Oversight Workgroup since the last meeting.

Gary Fenton volunteered to assist in a brainstorming session focusing on ways to improve broker support of the GRI program.

Broker University updates were provided by Barb and Laura
MOTION: Made, seconded and carried to approve partnering with CRB to incorporate the CRB Accelerate Broker Track into MyBrokerCoach as Series 200.

Industry Partner Conference update was provided by Frank Dickens. Suggestion for future conferences: give each vendor 3 complimentary registrations that they can give out to members to attend as vendor's guest.

Leadership Conference update was given by Barb and Evan. Overall focus for this year's conference will be based on building teamwork.

Communication updates were given by Bethany. Of note, there was quite a bit of discussion regarding offering a "recommendation" feature on the member profiles which would be enabled by those members who choose to allow it.

MOTION: Made, seconded and carried to approve discontinuing the print version of the Quarterly publication and provide it in pdf format in 2014.

MOTION: Made, seconded and carried to approve producing the monthly digital magazine (AZR) in pdf-format only in 2014.

Next Meeting: October 21, 2013 (1:30 – 3:30)

Adjourn: There being no further business, the meeting was adjourned at 3:15.

Barbara Freestone

PROFESSIONAL & BUSINESS DEVELOPMENT COMMITTEE REPORT – 2013

Prepared For: ***EXECUTIVE COMMITTEE***
From: **Professional & Business Development Primary Committee (PBD)**
Chairman: Larry Hibler
Vice Chairman: Lori Doerfler
Staff Liaison: **Barb Freestone**
Date: **September 19, 2013**

REALTOR®... the best prepared real estate practitioner with the highest standards.

CURRENT TOP PRIORITIES

Education Outreach: *implement and communicate 2014 program to AE's*
GRI Re-Imagine – *continued announcements to membership, complete development of new and revamped modules, put together 2014 calendar*
Website redesign – *Complete e-commerce functionality, complete development of online registration functionality*
Live Broadcasting Class – *finish internal testing/begin external testing*
Industry Partners Conference *– recap*
Leadership Conference - *implement*

RECOMMENDATIONS

GROUPS FORMED

- GRI Oversight Workgroup (Gary Nelson)
- Spring Conference Planning Workgroup (Paula Monthofer/Nick Bastian)
- Course Certification Review Panel (Kyle Karstens)
- Broker University (Holly Eslinger)
- Communication Advisory Group (Sindy Ready)
- Industry Partners Conference (Frank Dickens)

Support & Resources

The is a support budget enabling services and resources that contribute to the development and improvement of our products and services which position AAR to deliver preeminent educational programs and the most effective communication methods.

Measurable objectives	Status
Programs have the necessary	On going

resources/tools needed to develop, offer, market or communicate.	
Updates and information is provided to the appropriate groups throughout the year.	On going
Emerging technology, medias and platforms are used where appropriate to deliver products and services to members throughout the state.	On going
Staff maintains and enhances their knowledge and skills to develop and offer exceptional educational and communication products and serve as a resource to assist local associations in their education efforts	On going
AAR maintains its own learning management system and is utilized to develop and host AAR's online education.	After research and evaluation of cost, staffing and technology – we are partnering with Learning Library to host AAR's online classes. (Learning Library is NAR's online vendor)

Broker University

This program involves:

- *Broker Seminar(s)*
- *CRB class(s)*
- *MyBrokerCoach*
- *Broker business tools development*
- *Broker Outreach*
- *Needs assessment*

This plan provides for the development and/or delivery of education programs/resources designed specifically for brokers and managers who wish to enhance their business success.

Measurable objectives	Status

AAR provides a spectrum of programs and services to brokerages/owners to enhance their business success.	CRB class held in January Leveraging Teams (16 students) BMC's held at Spring convention Audit class held at Spring Convention Broker Summit held on June 24 (111 attendees) 3 P's of Audits class scheduled for September 30 Property Management Trust Accounting class scheduled for Sept 30 (at request of ADRE)
Essential information and tools are available to new brokers which focus on operating a successful brokerage.	MyBrokerCoach available online
Positive feedback is received from programs offered.	CRB class: positive feedback received Positive feedback received from June 24 Seminar.
Conduct a broker needs assessment	
Investigate current broker programs to determine if any qualify for broker prelicensing credit	Based on ADRE criteria, none can qualify at this time
Employ communication strategies to inform brokers of programs, products and resources available to them	In concert with Risk Management Broker/Manager Update Information displayed at Broker education classes
AAR provides a BrokerCoach program to enhance brokers skills in operating a successful real estate brokerage	MyBrokerCoach – 19 students to date. Partnered with CRB to Acellerate program as Series 200 content.
AAR offers, or partners where feasible, enhanced broker management clinics	Held during Spring Convention and held in Bullhead city in partnership with Bullhead city/Mohave Valley association. (BMC #1 10 attended/BMC #2 8 attended) BMC's scheduled in Flagstaff October 11
Develop a "broker" page on the AAR website to house in one place information specifically for brokers	http://www.aaronline.com/increase-knowledge/new-broker-programs/
Build broker support for the educational opportunities AAR offers their members	Complimentary GRI class held for brokers in January to acquaint/reacquaint brokers with the quality of the GRI program..

rCRMS (Certified Risk Management Specialist)

This plan provides for an education certification program that is designed to enhance member's knowledge tomanage and minimize member's liability. The rCRMS program is the only state specific risk management program available to AAR members.

Measurable objectives	Status
rCRMS classes are offered throughout the state where feasible	Federal Issues (Tucson) February 5 - cancelled Short Sales/Foreclosures held February 22 (15 attended) Disclosure class held during the Spring Convention Essential Skills class in Tucson April 25 (cancelled) rCRMS Agency class scheduled for October 22 rCRMS Federal Issues class scheduled for October 28th.
Positive feedback is received from the rCRMS classes	Positive feedback received from February class
A cadre of qualified instructors is maintained and monitored	ongoing
Membership is aware of the rCRMS program, course schedule and its benefits	ongoing
Newly certified members are recognized through appropriate AAR vehicles	Two members competed the program in February – announced on facebook and webpage One member completed the program in April – announced on Facebook and webpage
Investigate the feasibility of developing an online option to deliver the rCRMS	Referred to 2014

Education Outreach

This program involves:

- *Partnership opportunities to deliver national classes to local associations*
- *Direct delivery of national (ie.NAR/SRS) classes*
- *Statewide calendar*
- *Resources to assist local association education endeavors (Instructor Directory)*
- *Marketing efforts*

This plan concentrates on delivering directly and through partnership opportunities to bring quality and affordable programs and products to members throughout the state.

AAR provides assistance to or partnership with local associations to bring REBAC designation and certification courses**.**	Partnerships formed to date with: Green Valley Northern Arizona Tucson SEVRAR Southeast Arizona Western Pinal Prescott Scottsdale Phoenix WEMAR Green Valley/Sahuarita Profit Share revenue disbursed to: Northern Arizona, Tucson, SEVRAR, Scottsdale, Prescott, Phoenix
Local associations participate in partnership opportunities with AAR	Northern Arizona • RSPS – March 26 (14 attended) • Property Mgmt Boot Camp – April 23 (30 attended) • Marketing Reboot - May 7 (cancelled) • Property Mgmt Boot Camp – July 19 (21 attended) • ABR – Sept 5-6 (cancelled) • SRES – Oct 8-9 • BMC – Oct 11 Tucson

	• SRES - Feb 21-22 (15 attended) SEVRAR • BPOr class – June 4 (39 attended) • SRS – June 26-27 (25 attended) • Property Mgmt Boot Camp – Sept 27 (75 registered to date) • ABR – October 28-29 Southeast Arizona • SRES class – June 13-14 (17 attended) • BPOr – August 11 (12 attended) Western Pinal • SRES – Sept 17-18 Scottsdale Property Mgmt Bootcamp – July 17 (26 attended) Prescott • ABR – June 27-28 (22 attended) • RSPS – July 22 (25 attended) • SRES – Sept 23-24 (11 registered to date) • Marketing Reboot – Oct 10 Bullhead City/Mohave Valley • BMC 1 and 2 – March 29 (10 attended #1 and 8 attended #2) • ePRO – June 24 Phoenix • 3 P:'s of Broker Audit – September 30 • Trust Accounting – September 30 WeMAR • Property Management Bootcamp – October 18 Green Valley/Sahuarita • SRES – October 30-

	November 1 AAR classroom • SRES – Jan 28-29 (24 attended) • rCRMS – Feb 22 (10 attended) • SRES – March 18-19 (19 attended) • GenBuy – August 15 (12 attended)
Education programs focus on tools targeting on new and core competencies and trends that members need to succeed in the marketplace.	NAR brought their TechEdge conference to Bullhead City April 19 (85 attendees). Positive feedback received
Members have access to an online statewide education calendar.	Available on ADRE website. AAR webcalendar links to ADRE site
Provide a forum for local education staff and ADRE (updates and Q&A on school process,policies,guidelines)	
Employ communication strategies to inform members of educational opportunities	e-blasts, website, webcalendar, participate in firm and association expos, commercials running in AAR classroom lobby
A central directory of quality instructors in the state is available to local associations and members	Developed but not used – will be evaluating the directory mid-year.
Cross marketing strategies are utilized to promote designation and certification courses where appropriate	Course promotion e-blasts contain list of upcoming classes, AZR lists upcoming classes

Education Development & Delivery

This program includes:

- *Course library*
- *Curriculum development resources/tools*
- *Course certification program*
- *REteach.us*
- *Remote Delivery platform*
- *Online platform development*
- *Rookie resources/programs*

This plan targets professional competency through the development and/or delivery of education programs bringing skill-building and knowledge to the members utilizing the most effective delivery vehicles. This plan also provides programs that establish standards in Arizona real estate education (instructors and courses) recognizing the REALTOR associations as the ultimate provider in REALTOR education.

Educational programs offered by the association meet quality standards and sets the bar for excellence in education	All rCRMS classes certified In process of reviewing REBAC classes
AAR develops and provides a partnership program with local associations in education classes delivered via remote satellite.	Criteria identified – waiting for ADRE approval. ADRE developed criteria, but feel it needs to go through statute or rule needs
Volunteer monitors are identified and trained to assist in the remote delivery system and facilitation skills	
Employ communication strategies to make members aware of the course Certification program and its value	Ongoing
AAR builds and maintains a library of AAR courses which is available for local association use.	
Trained instructors and staff are available in each region to deliver AAR developed courses.	Instructors identified in Region 1, 3 and 2.
Incentives are identified to encourage local associations to engage instructors who hold the ME certification when offering AAR courses	Referred to 2014
A vehicle is available for members to review and comment on instructors and courses	www.REteach.us.. $10 discounts on AAR classes available to members who write a review on the REteach site.
Emerging education trends are monitored throughout the year	ongoing
Tools are available to help members assess their own skills and identify where they need to hone their skills and knowledge.	Working with NAR to customize an online assessment tool.
Assistance is provided where appropriate to	As needed

ADRE to enhance prelicensing and postlicensing curriculum criteria and/or processes	

Instructor Development

This program includes

- *REteach (instructor side)*
- *Instructor Development opportunities/resources*
- *Instructor Certification Program*
- *Instructor Forum*

The skill set of instructors are key in ensuring learning takes place in the education venue. This plan focuses on enhancing the core competency level and standards of instructors involved in Arizona real estate education, and assisting instructors who wish to hone their skills.

Measurable objectives	Status
Opportunities are available for instructors to communicate and share with each other	Instructor forum held July 29. 45 attendees. Extremely positive feedback received from attendees (both in content and format) REteach
Instructors participate in AAR's Instructor Certification Program	5 applicants in review
AAR recognizes quality educators and staff	ME Certification (7 applicants to date)
Opportunities are available for instructors to examine their subject knowledge through self-assessment tools.	NAR hosts subject matter self-quizzes

Industry Partners Conference

This plan provides for partnering with the Arizona Mortgage Bankers Association and Arizona State Escrow Association to offer a one day program bringing REALTORS, lenders and escrow reps together to learn from each other.

Measurable objectives	Status
Through partnership program with AMLA	September 11, 2013 (Chaparral

and ASEA members understand each others role in a real estate transaction.	Suites) Positive feedback received 350+ attendees (including vendors) 75 – AAR 74 – AMLA 100+ - ASEA.

Leadership Training & Development

This program consists of:

- *Leadership Conference*
- Leadership Communication tools
- Leadership resources

This plan consists of programs that house the AAR business meeting as well as programs/tools that bring together AAR and local association leadership for thought-provoking discussion on leadership issues, association updates and opportunities to build an effective statewide leadership team.

Measurable objectives	Status
Information, resources, programs are available to incoming leadership to help them fulfill their leadership role.	Conference scheduled for October 15-17 at Talking Stick Resort
Opportunities are promoted to members who wish to pursue a leadership role	
Leaderships have access to a series of video and support material addressing leadership and grooming future leaders	
Leaders have access to and opportunities to network with each other	

MRE Society

The MRE Society is a membership society recognizing members educational accomplishments/commitment and a tool to differentiate themselves from their peers.

Measurable objectives	Status
A tool is available and used to recognize members educational accomplishments	MRE Society – 2013: 24 – New Members 21 – Renewing members

	6 – Gold members
Employ communication strategies to inform members about the MRE Society	Facebook posts, emails blasts, application in classrooms
Annual satisfaction survey is sent to MRE Society members	Midsummer
A member-only education program is offered	MRE-only class (Sticky Situations) will be held on 5/23/2013 Class Registration discounts available for AAR-sponsored classes for MRE Society members in 2013

Member Communication

This program includes:

- Website
- Social media vehicles (facebook, twitter, blog, YouTube)
- Outreach activities
- Member engagement activities: polls, commenting/rating, contests
- Program, product and services videos, webinars, podcasts
- Readership/communication survey
- Website
- AZR and AZQ

Through a variety of AAR branded communication vehicles members stay abreast of the real estate trends and information dedicated to keeping them in the forefront of industry and is regarded as the premier informational resource for members.

Measurable objectives	Status
Broadcast time-sensitive industry information though multiple communication channels	Ongoing
Encourage engagement with communications content through the use of video, images, familiar faces, polls, contests, etc	Weekly polls are performing well on website. Commenting on articles on the rise. Continuing #AskScott video series with dedicated Web page
Staff and members are aware of trends inside and outside of the RE Industry	Ongoing

Employ communication strategies to inform members of AAR's value proposition	Website redesign labeling focuses on value propositions
Offer opportunities for members to share their insights through posts and comments	Commenting available on AZR articles and facebook. Social sharing, commenting and rating on posts within new AAR website. Members are not using social sharing icons on AAR website.
Short videos are utilized to deliver messages to the membership (educational and informational).	Ongoing. Launched #AskScott Web series in July, featuring AAR General Counsel Scott Drucker. Completed RAPAC video to encourage participation, features many AAR members.
Continually monitor (and enhance when needed) the use of all its communication vehicles to ensure they meet the needs of the members.	Completed member survey in July 2013. Communications Advisory Group continues to meet to address shortfalls in communications and strategy.
Investigate ways to customize communication vehicles used to reach members based on their preferences	Testing Opt-in functionality on Buyer Advisory and it is not being utilized.
Deliver timely information and updates on AAR activities to local association and AAR leadership	Ongoing.
Publish e-magazine and push to members via e-newsletter and social media	Monthly ***Arizona REALTOR® Magazine E-blast*** July #1 Open Rate: 24.27% July #1 Click Through: 6.72% July #2 Open Rate: 24.84% July #2 Click Through: 3.51% August #1 Open Rate: 20% August #1 Click Through:3% August #2: Open Rate: 31%

<table>
<tr><td></td><td>August #2: Click Through:7%

Note: Continuing to push twice a month for the remainder of the year.</td></tr>
<tr><td>Evaluate quarterly print publication and publish as appropriate</td><td>December 2013 will be the last printed edition of the AZQ. We will offer an online only publication in 2014.</td></tr>
<tr><td>Review and update AAR’s communication plan which outlines goals, audiences, key messages, vehicles and timelines</td><td>Ongoing.</td></tr>
<tr><td>Identify missing, under-utilized or emerging communication channels and move into them.</td><td>Launched AAR Linkedin page, continuing to modify, etc.
Revived AAR Google+ Page.</td></tr>
<tr><td>Use social media, committee meetings, in-person outreach and other methods to listen to what members are concerned about and tailor content to respond.</td><td>Ongoing

Facebook:
August likes: 5,322

Twitter:
August followers: 4,721

YouTube:
August: 1,438 views, 3,023 minutes watched

Google+:
Added to 34 circles</td></tr>
<tr><td>Enhance and maintain a modern, functional website which provides information and resources to members 24/7</td><td>Launched expanded member profiles in August.
Added sitemap to the website in September

AAROnline.com
<table>
<tr><th></th><th>July Stats</th><th>Δ Month-on-Month</th></tr>
<tr><td>Visits</td><td>31,464</td><td>↑ 2,768</td></tr>
<tr><td>Unique Visitors</td><td>19,676</td><td>↑ 1,665</td></tr>
</table>
</td></tr>
</table>

Page Views	107,773	↑ 11,357
Unique Views	79,180	↑ 8,614
Pages Viewed/Visit	3.43	↑ .07
Avg. Time on Site	3:28	↓ :08
Bounce Rate	47.17%	↑ .88%
New Visits	48.88%	↓ .06%

	August Stats	Δ Month-on-Month
Visits	29,695	↓ 1,769
Unique Visitors	17,622	↓ 2,054
Page Views	100,055	↓ 7,718
Unique Views	72,991	↓ 6,189
Pages Viewed/Visit	3.37	↓ .06
Avg. Time on Site	3:29	↑ .01
Bounce Rate	46.69%	↓ .41%
New Visits	44.86%	↓ 4.02%

Blog

	July 2013
Unique Site Visits	1,910
Page Views	3,164
Pages/Visit	1.43
Avg. Visit Duration	1:12
Number Posts	13
Subscribers	309

July 2013 Most Read: Ask Scott (210 Unique Views)

	August 2013
Unique Site Visits	2,086
Page Views	3,464
Pages/Visit	1.41
Avg. Visit Duration	1:02
Number Posts	12
Subscribers	303

August 2013 Most Read: Fannie Mae (217 Unique Views)

Drive traffic to aaronline.com/benefits through various communication vehicles	Continuing to feature AAR member benefit in AZR eblasts and on the back of the AZQ
Create a member-benefits collateral	Start date is October

that can be distributed to members and through local associations	
Attend primary committee meetings to share and gather information	Ongoing
Identify audience segments and develop content tailored to that segment (i.e., new members)	Ongoing
Utilize workgroups, task forces, advisory groups to shape and enhance AAR's communications efforts	Ongoing. Communication Advisory group met three times this year.

REALTOR Institute: GRI Designation

This program includes:

- Program administration
- Curriculum maintenance
- Instructor development/oversight
- Online exam delivery
- Promotional and awareness activities
- Monitor program
- Scholarships
- Designee/non-designee survey
- GRI website and facebook

This plan provides for a comprehensive training program for the member at large delivering specific how-to and best practices training in all aspects of residential real estate in the current marketplace. Additionally, this plan provides the administrative resources to ensure that the GRI Designation offers unsurpassed post licensing curriculum

Measurable objectives	Status
The GRI program is offered throughout the state in partnership with course providers where possible. .	12 associations offering GRI classes 62 classes scheduled in 2013
An effective and affordable vehicle is identified/evaluated to provide the GRI designation to associations who cannot offer the program themselves	In the process of testing AAR's televised class technology to deliver GRI classes to outlying areas 33 members took the online business plan class

The GRI program logistics are evaluated annually (curriculum, instructors, monitors, course provider, policies).	Proposal to revamp program was approved with rollout January 1, 2014. Associations, candidates and instructors have been notified. Development completed on new Technology, Consumer Satisfaction and Market Essentials class. Development in process of revamped Agency class
Positive feedback from the students, providers and instructors is received in terms of quality and relevancy and meeting the needs of the members/students	Student feedback from classes held to date continues to be positive.
The GRI program incorporates introductory designation and certification courses into the curriculum where appropriate	NAR designations/certifications are accredited for GRI elective credit. 2014 program will increase the GRI credits offered
A cadre of qualified instructors is maintained who meet the AAR Instructor certification standards	22 senior instructors/1 junior instructor
Employ effective strategies to inform Members of the GRI program and its benefits to building a successful career.	Monthly e-blasts sent full membership; average 21% open rate/1.1% click-through rate) GRI material displayed at AAR events AZR article published re: revamped program E-blasts sent to current candidates regarding changes to the GRI program
The curriculum meets student needs, Course Certification standards and delivers content that provides practical application and current industry practices.	Ongoing review of course evaluations and feedback from students. AAR has scheduled field test classes for new-revamped GRI courses: July/August classes included: Technology class (7/8)

	Consumer Satisfaction (7/j9) Market Essentials (7/31) September/October classes included: Market Essentials (2nd offering) (9/19) Financing (9/24) Agency (10/8)
GRI Administrators and monitors are trained and have access to ongoing resources to assist them in performing their responsibilities.	Administration site on AZGRI was updated to make navigation for administrators streamlined. Tele-meeting held with associations to discuss implementation of new program and answer questions.
Conduct an annual survey of GRI designees and candidates	Defer to 2014 based on 2014 Re-Imagine program development
New designees are announced where appropriate	GRI & AAR Facebook pages. GRI website. Email sent to local associations.
Online options are available to members where feasible and appropriate	GRI 100 Business Planning REBAC classes which can currently be used as electives offer online options
A scholarship program is available to members.	1st Quarter amount disbursed: $3220 2nd Quarter amount disbursed: $5412.32 3rd Quarter figures not in yet. GRI Lucky 13 Sweepstakes ran through March 31st: $2,000 in fund. Winners are Curt Rowe and Julio Martinez . AAR pays the remaining 2013 GRI class registration fees for the two winners. .

Spring Convention (formerly Winter Conference)

This plan provides for a one and one-half day conference followed by Regional Caucuses and Board of Directors Meeting. Conference format varies from year to year, but generally consists of sessions featuring industry topics/updates.

Measurable objectives	Status
A statewide conference is offered that explores the challenges of the current market and provides information on best practices to help members learn how to adapt and succeed as well as make new contacts and share ideas.	April 7-11 – Casino Del Sol, Tucson Attended: 148 full package 153 day registrants 18 expo vendors
Positive feedback is received	Positive feedback received from attendees

Agenda Item: Broker University

The 2013 Business Plans provides for a broker needs assessment.

Proposal:

Method: Survey Monkey

Objective: Determine education needs of brokers/managers as well as identify education /activities within brokerages.

Discussion: What questions should we include on the survey?
Some suggestions could be:

- What is the most important factor in determining what education class to take
  - Instructor, location, topic, cost, c/e category
- What class topics would you be interested in attending
- What day of the week is most desireable to you to attend c/e classes
- Do you hold the rCRMS certification.
  - If no, why
- Do you hold the CRB designation
  If no, why
- What resources or tools can you not live without in running an office or supervising your agents?___________
- Do you offer in-house c/e classes for your agents
- Do you have an in-house trainer on staff or bring in a contract instructor
- Do you offer free c/e classes for your agents or charge a fee
  - If yes, how many c/e classes per month do you typically offer
- Do you reimburse your agents for earning designations/certifications
- Do you offer education as an agent benefit
- Do you recommend education classes to your agents
- Do you provide mentoring of new agents
- What topics do you feel your agents NEED most to succeed
- How can AAR assist you in training your agents
- Do you hold
  - Office meetings
  - Lunch N learns
- Would you like AAR to make a presentation to your agents regarding the NAR designations

Agenda Item: Industry Partners Conference

September 11, 2013

Preregistered	349
Walk ins	11
Total	360

No Shows 27 Title/Escrow
24 Realtors
9 Lenders

Total No Shows 60

Attendees broken down by group – (this includes no shows)

Realtors – 86

Lenders – 86

Others -- 26

Staff -- 7 (6 AAR & 1 AMLA)

Title/Escrow – 155

Industry Partners Conference Evaluation Summary
Sept 11, 2013

What is your overall rating of the conference?
55-Excellent 23-Good 1-Fair Poor

Were your expectations met?
81-Yes 3-No

If no, why?

- Exceeded
- This is the best information I received despite taking loads of continuing education.
- Seemed like the tables were too close together x3
- Liked changing tables more – I was at the same table almost all day
- Sound system was poor, hard to hear. Lacked the opportunity to network by changing tables more often and lacked more knowledge building by having multiple subjects at different tables.
- Would have liked more info from FBI on loan fraud
- Not enough REALTORS®, low energy, too many vendors in the halls x2
- Moved very slow this year
- I expected the separate topic roundtable discussions w/topic moderators – contract law, financing, 1031, etc.
- More scenarios

Did you learn something that you can put into use in your daily business?
82-Yes **3-No**
Please share:

- Better understanding of the AAR Contract x2
- W8-BEN
- I have never seen an additional clause addendum. It's great to know about its existence to inform new agents x9
- Interesting discussion on a variety of topics.
- FIRPTA would be a good topic for next year x2
- Following up on prequel form to better understand its impact on the terms of the contract and share with my real estate partners
- PQF is an addendum and not a supporting document
- How to include square footage depends on heating/cooling
- No walk thru – buyer pays for repairs potentially
- If SPDS needs updating, buyer gets 5 more days to disapprove
- Disclosures, cancellations
- Round table discussions regarding the transaction scenario was helpful
- I enjoyed the 20 questions with Rick Mack, very informative
- Absolutely – always learning
- Information about FIRPTA I wasn't aware of as well as all sorts of other tidbits given x4
- Lots x2
- Lender and agent's opinion on issues x2
- The importance of the Prequal forms – Pay attention / Cure notices – Read what they say x2
- Yes, I did not know that broker's info must be larger than the agent's info on marketing materials
- FBI was most informative x2
- Rick Mack was #1 informative for one as a Recruiter
- FIRPTA as a lender – was not aware of this, good to know
- Check details ALWAYS
- Multiple contract scenarios, they were great!
- FIRPTA only applies to homes over $300K
- Section 6j is in effect with any buyer disapproval
- Strategies for cure period notice and cancellation depending on which party you represent, market conditions and other factors x3

- More clarifications on warranted items and HOA restrictions on signs x2
- Multiple clauses x2
- Really need to go through forms and scenarios often
- Yes
- Non refundable is non refundable
- Learned the lender side and the title side of a transaction
- Facebook
- Coverage available under homeowner policies
- Contract language x2
- Better BINSR negotiation

If you were planning this conference, what changes would you make?

- Give more direct answers. Some questions were "answered" but I still don't know the right answer because there was so much "back & forth".
- Nothing, you did a great job x12
- Warm up the room / too cold x5
- Serve coffee after lunch/pm x2
- Put a facilitator at every table and each table should have a member from mortgage, title and real estate community x2
- Conference could have been larger.
- Ice Tea on every table and bigger cups
- Do not give A & B scenarios to everybody – nobody switched tables.
- More round tables discussions, more speakers, less breaks x2
- Not necessary to change tables x3
- My moderator got carried away telling stories about herself and her transactions – got really tired of this.
- Let's create different scenarios and then upload all the answers to each one on the website so we can all refer back to later. There's so much to share and learn – this is great!
- We were left with lots of spare time in the group exercise – More Rick Mack stuff
- Content was very good. Round table discussions were good and moved along well
- Round tables were awesome x3
- Wish we had 2 different scenarios or a different format for 2nd or 3rd round tables – we're all a little sluggish after lunch x2
- Sound system difficult to hear x13
- Slides difficult to see on the sides of the room x2
- Get more REALTORS® to come x2
- Involve a REALTOR® to recruit more REALTORS (Jill Gerber with phone # given)
- Desirea was good but hard to understand
- Use the table #s in place to release for lunch
- WiFi needs to be improved; we can't tweet if we can't connect
- Less talk time during the questions
- More time for questions and answers after each speaker
- Vendors that help in other ways (organization, business tools etc)
- Make it a little shorter x2
- It was too redundant with the same case study – should at least change scenarios x2
- I've been attending for almost 10 years - I missed moving around and meeting other people

- Vendors should be in the room instead of the hall
- Need better division of industries at each table   x2
- Rotation of table mates
- Some answers were vague and not specific
- More legal hotline discussion
- More about mortgage fraud or things to watch out for
- Afternoon sessions should be more “EXCITING” as many left early
- More than one scenario, boring with just one   x2
- Shorter discussion time
- Go back to separate round table topics and change tables
- Spread tables out more
- Keep scenarios only in one session AM or PM – not both.
- More networking opportunities

As a REALTOR®, what is the biggest challenge you feel you are facing in this market?

- Uneducated agents / lack of education   x6
- Not being knowledgeable about market   x2
- Changes in lending – Dodd Frank, new walk-thru form, etc.
- Understanding all docs and forms
- Other agents are not educated and brokers are not on the same page
- Non professional agents
- Keeping up with regulation changes
- Low inventory, price values going up quickly
- Lenders not understanding the contract time frames
- Changing market. Finding buyers homes with <u>lack of inventory</u>   x6
- Lending and appraisals   x5
- Keeping continuous business in my pipeline
- Identifying and qualifying buyers for purchase
- Having loans completed in a timely manner and trying to keep buyers calm regarding the loan process
- Hiring good/knowledgeable agents   x2
- Educating fellow agents to improve quality and integrity of our industry
- Interpretation of contract language
- Picky buyers
- Changing financing rules
- The lack of knowledge and conviction by the REALTOR® to market for their clients
- Time Management
- Keeping up with technology
- Making sure challenges don’t turn into challenges

As a lender, what is the “unique” factor in this conference?

- Like minded industry professionals working towards a common goal
- Education and Scenarios
- Gaining a better understanding of issues and challenges that REALTORS® and Escrow have to deal with in our ever changing industry. REALTORS®, Escrow and Lenders have to work as a team to get transactions to close successfully.
- Meeting lots of other peers. Picking brains of business pros.
- Getting to meet Title and REALTORS® in a learning environment
- Great opportunity to network

- Total candor between disciplines

As a title/escrow agent, what is the "unique" factor in this conference?

- No other gathering that brings the synergy like the Partners to our industry
- To get the lender and REALTOR® point of view x4
- Getting to work and brainstorm with agents and lenders x5
- I think the unique factor is that we get to discuss the same situation but see other party's point of views x3
- I especially enjoyed Rick Mack and real situations.
- Loved the presentation from the FBI. X2
- I enjoyed all of it! X2
- Questions REALTORS® ask now, not during transactions
- Contract issues and learning about them
- Mortgage Fraud
- Great information
- Getting an attorney to answer questions
- We can all help each other in many ways
- Everybody thinks my job is a piece of cake
- Would have liked to see more REALTORS® present
- Fraud is real and the FBI is watching all of us in the industry
- Everyone looks to escrow to resolve…lol
- The interaction w/other business partners x2

As a REALTOR, what is the "unique factor" of this conference is for REALTORS?

- Chance to interact with Lenders and Title to discuss issues x10
- The personal networking experience
- Different points of view
- That we get to sit down with Lenders, Title, Agents and Lawyers about our business and challenges x5
- Bringing us all together and giving input
- Current information of our market and to interface with escrow and lenders
- So many different views of business sharing information
- 3 partners together sharing issues and ideas x10
- Also QR Codes!
- Makes us make sure we know what we are doing
- Hearing the perspective of title and mortgage
- The ability to interact with vendors of the different industries
- What title/lenders wished we'd do differently to make a smoother transaction
- The caliber of speakers x2
- Updates on industry
- Loved reviewing scenarios

How many Partners Conferences have you attended in the past?
31-This was my first one 30/ 2-5 10/ 5-7 14/ 7+

What is your primary affiliation?
46-REALTOR® 31-Escrow/Title 7-Lender 1-Other

To keep this conference fresh, what changes to the conference format would you make for next year?

- 2 Separate subjects, one in the AM and one in the PM
- Same as this year's 2013 in 2014
- Space tables further apart to help w/hearing others x2
- Just the acoustics. Hard to hear even across the table.
- To have an Industry Leader from each category (Lender, REALTOR®, Escrow) speak regarding up and coming issues or information in their fields
- More moving around x2
- Advertise more and get more people involved
- No switching tables – just handout both A&B scenarios x2
- Nothing x3
- Less scenarios and more speakers
- I would like to see more Brokers send information to their agents to attend the conference. Most of the agents I work with have not heard about the conference and do not know that it is continued education credit hours.
- Motivational speakers
- I really liked this format x3
- More straight forward answers
- Make it shorter, for those who travel x2
- Better division of industries at each table – table assignments x2
- Quicker discussion and more scenarios
- More REALTOR® attendance
- Have lenders move tables for one move and then just the title people on the next move
- More case studies which means shorter more focused discussions
- Just have what is current in industry present
- Add social media issues to the mix including advertising, marketing, etc.
- Separate topic tables
- Cold venue – brrrrrrrrr
- More round table discussions
- More legal question discussions
- Keep the end of the meeting short and on schedule

What was the most valuable portion of the program?

- All of it! X5
- Update on current issues at legal hotline
- Sharing of information on several topics
- REALTOR® networking related to education not just networking to network…networking to grow from one another
- Rick Mack x6
- FBI x12
- Question and Answer Session x4
- The discussion of Escrow Scenarios x4
- The Education x2
- My moderator – Holly Eslinger
- Having all views at one table! X3
- Communicating with everyone x2
- Very impressive this year! Bring back Rick Mack and Desirae Tolhurst
- Round table discussions x6

- Mortgage Fraud
- Case Studies
- Sitting with an AAR Director – Jan Steward ☺
- All the team work that was happening
- Scenario discussions
- Networking and hearing the other perspectives x2
- My table – they all participated
- Meeting my table partners and possible future referral partners
- Breakouts
- Loved the First American Purchase Contract Book

General comments:

- This conference was awesome!
- Great event! X5
- This was the BEST IPC yet! Thank you so much for all of your efforts. X2
- Just a valuable conference, wouldn't miss it!
- Found presentation by FBI Agent an interesting one and a great post lunch presentation – well presented!
- Great learning experience! X2
- Excellent! X2
- Much better than 2 years ago
- FBI Agent – Amazing!! X3
- The food and facilities are good minus the WiFi x2
- Frank was Awesome!
- Will plan to attend next year, thanks! X3
- ½ price tickets to agents – I believe we should give the agents a discounted rate to get more attendance of REALTORS®
- I'm so glad the content and experience has been better over the last couple of years.
- Would love to serve/volunteer for next year's event (Renae Reynolds w/phone #)
- I'm cold!
- Make it easier to pay for conference other than PayPal!
- Great! I got to sit with Holly, she is a terrific and wonderful table facilitator
- Not so much time for discussions – waiting long time at end of day
- Enjoyed but needed to end about 3pm
- Very moving remarks about 9/11
- Thank you!
- This 2013 Conference was the BEST one I have been to!
- I really wasn't impressed this year and don't know if I'll be back next year.
- Very enjoyable – will be back again

Agenda Item: Leadership Conference

October 15-17, 2013

Total Registrants: 127

General Feedback:

Agenda Item: Remote Delivery

2014 REMOTE Delivery Schedule

Classes AAR is responsible for scheduling the instructor)
(rick not available in January or august)
confirmed via email confirmations

Jan 16	rCRMS Federal Issues-SAAR Mary Frances Coleman
Jan 24	rCRMS Federal Issues-WEMAR Mary Frances Coleman
Jan 30-31	SRES-SAAR Frank Dickens
Feb 18	rCRMS Federal Issues (fair housing/legal issues) (Frank/Rick) REMOTE
February	G-Ethics (REMOTE)
March 6-7	SRS-SAAR
Mar 17-	Marketing Reboot (Stacey/Holly) REMOTE
April 21	rCRMS Agency (Rick Mack/Frank Dickens) REMOTE
April 25	rCRMS Successful Closing – SAAR Mary Frances Coleman
April 25	Property Management Bootcamp-WEMAR Sue/Mike/Denise
May	G-Transaction Technology (REMOTE)
May 19	rCRMS Successful Closing (Mary Frances REMOTE)
May 15-16	rCRMS Contract-SAAR Mary Frances Coleman
June 6	rCRMS Agency - SAAR Rick Mack/Frank Dickens
June 12	Gen Buy (Evan & Paula) REMOTE
June 18	rCRMS Federal Issues-PAR Rick Mack/Frank Dickens
June	G-Financing (REMOTE)
July 14	Property Mgmt Bootcamp – SAAR Sue/Mike/Denise
July 21-22	SRS (Frank) REMOTE
July 25	rCRMS Agency-SEVRAR Rick Mack/Frank Dickens
August 1	Marketing Reboot-SAAR Evan Fuchs
Aug 18-19	ABR (Evan) REMOTE
August 22	rCRMS Federal Issues-SERAR Mary Frances Coleman
August	G-Agency (REMOTE
Sept 15	rCRMS Disclosure (Frank/Rick) REMOTE
September 19	Gen-Buy-SAAR Paula Monthofer
September	G-Customer Satisfaction (REMOTE)
Oct 20-21-22	SRES (Frank) REMOTE
Nov 18	Market Essentials (Holly/Stacey) REMOTE
December 3-4	rCRMS Contract-SEVRAR Mary Frances Coleman
December 11-12	ABR-SAAR

Agenda Item: ADRE Stats

Original Broker Pass Rate:
- 67% June
- 61% July
- 70% August

Original Salesperson Pass Rate
- 69% June
- 67% July
- 70% August

active schools: 202
active courses: 2910
active instructors

41 ADRE monitors (20 are in Phoenix Area)

Interesting note: between September 10 and 30th, there were 667 courses offered in Arizona