

Arizona Association of REALTORS®
Professional & Business Development Committee
 January 16, 2014
 Agenda

- | | | |
|-------|---|---------|
| I. | Call to Order – Chair Lori Doerfler | |
| II. | Welcome and Introductions | |
| III. | October 21, 2013 Minutes | Page 2 |
| IV. | 2014 Workgroup/Task Force Overview | Page 3 |
| V. | Overview of 2014 Business Plan | Page 4 |
| VI. | April Spring Convention Update - Beth Adams | |
| VII. | Education Programs Update/Overview | |
| | A. Education Outreach Program Activities – Barb Freestone | Page 26 |
| | B. Remote Delivery Update – Barb Freestone | Page 27 |
| | C. Broker University – Holly Eslinger | Page 28 |
| | D. GRI – Stacey Onnen
2013 year-end stats
Update Report | handout |
| | E. Leadership Development Program – Holly Mabery | |
| | F. MRE Society – Brittini Matt | |
| VIII. | Communication Products – Bethany Brannen | |
| | A. 2013 Year-end Stats | handout |
| | B. Website Activities | |
| | C. AZR Article Topics | |
| IX. | General discussion | |
| | A. ADRE stats | handout |
| | B. RAPAC | |
| | C. Issues or challenges in the marketplace | |
| X. | PBD Strategy Room Overview – Barb Freestone | Demo |
| XI. | Future Meetings
March 20
June 12
September 25
November 20 | |
| XII. | Adjourn | |

Arizona Association of REALTORS
Professional & Business Development
 October 21, 2013
 Minutes

The regularly scheduled meeting was called to order at 1:36 p.m. A quorum was present.

Present

Larry Hibler, chair
 Lori Doerfler
 Gary Nelson
 Sasha Lopez
 Bridget Reynolds
 Holly Eslinger
 Christopher Paris
 Rebecca Grossman (Exec Com Liaison)
 Holly Mabery – phone (Exec Com Liaison)
 Evan Fuchs – phone
 Mary Roberts – phone
 Gary Fenton

Staff

Barb Freestone
 Brittni Matt
 Laura Kovacs
 Kimberly Franzen

Minutes:

There being no corrections, the minutes of August 7 were approved

Updates were provided for the Broker University and Industry Partners Conference programs.

Gary Nelson provided an update on the GRI program

MOTION: Made, seconded and carried to approve the revisions to the GRI Policies, subject to legal counsel review.

MOTION: Made, seconded and carried to approve the revisions to the GRI Faculty Manual.

Bethany Helvie reported on the statistics for the website and AZR readership.

The committee identified the following value/benefits of the rCRMS program:

- Taught by attorneys
- Higher level of instructions/information
- Delve into case law to better understand application
- Learn ways to minimize risk in the day to day practice of real estate

Adjourn

There being no further business, the meeting was adjourned at 3:42 p.m.

2013 Professional & Business Development Committee & Workgroups

Spring Convention (formerly Winter Conference) Planning:

Chair: 2014: Beth Adams

GRI Oversight Workgroup

Chair: 2014: Stacey Onnen

Leadership Development Program Task Force

Chair: 2014: Holly Mabery

Partners Conference Planning Workgroup:

Chair AMLA appointee

Volunteers to serve (2 volunteers needed)

Broker University

Chair: 2014: Holly Eslinger

ARIZONA ASSOCIATION OF REALTORS®
2014 Professional & Business Development Business Plan

Program, Product, Service or Activity (PPSA):

Support & Resources

Brief description of how the PPSA contributes to achieving AAR's vision:

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.

Importance of PPSA to the critical-to-serve customer:

This plan provides for support and resource expenses providing *critical support to the programs and services in the Professional & Business Development area that enable AAR's programs to assist members to enhance their skills, knowledge and professionalism in the industry. Support services are also provided to other Area's programs and services.*

Strategic Focus Points: [Indicate one(s) the PPSA address(es)]

AAR is a member driven professional organization that delivers fiscal responsibility, functions within a fluid operational structure, responsive governance model and collaboratively partners with local and the national association to anticipate and satisfy member needs.

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AAR supports the success of REALTOR® members with business services.

Measurable objectives:

Measurable objectives	Status
Resources and tools are available to develop, offer, market or communicate programs and products within this business plan.	
Appropriate groups are updated and provided information throughout the year.	
Emerging technology, medias and platforms are used, where appropriate, to deliver products and services to members throughout the state.	

Staff continually develops the needed knowledge and skills to develop educational programs/products that are responsive to member needs and changes in the industry	
An effective and efficient learning management system is utilized to develop and host AAR's online education.	
Opportunities are identified and utilized to partner with allied groups or vendors when appropriate	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Broker University

This program includes Broker Seminar(s), MyBrokerCoach blended learning program, outreach and CRB class(s)

Brief description of how the PPSA contributes to achieving AAR's vision:

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.

Importance of PPSA to the critical-to-serve customer:

Professionalism comes from the top down. Accessibility to a broad spectrum of services and quality training/tools that increase the competency level of brokers and managers is essential to increasing professionalism of the industry and practitioners as well as manages risk.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Measurable objectives	Status
Programs and services are developed and/or offered to brokerages/owners which focus on operating a successful brokerage and/or managing risk.	
Partnership opportunities are explored that bring quality programs to our brokers when partnering is more advantageous than developing.	

Communication strategies and tools are employed to build broker support and awareness of programs, products and resources available to them	
A blended learning program, MyBrokerCoach is offered to develop or enhance brokers skills in operating a successful real estate brokerage.	
Broker satisfaction with broker-related services are monitored and measured.	
A dedicated "broker" page is available on the AAR website and continually updated to address the needs of the brokers.	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

rCRMS (Certified Risk Management Specialist)

(This program consists of a series of courses that lead to the certification)

Brief description of how the PPSA contributes to achieving AAR's vision:

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

Importance of PPSA to the critical-to-serve customer:

Better trained/prepared members result in more satisfied customers, more financial success and more members achieving the AAR Vision

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Measurable objectives	Status
The risk management certification program (rCRMS) focuses on state specific issues and is offered and available to members throughout the state where feasible.	.
A cadre of qualified instructors to deliver the rCRMS courses is maintained and monitored.	
Members are aware of the value of the rCRMS program through key "WIIFM" messages.	
A variety of marketing materials are developed and utilized to promote the rCRMS program.	
Newly certified members are recognized through appropriate AAR vehicles.	

Options to create online delivery of the rCRMS program is explored and developed where feasible	
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**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Education Outreach

This program involves providing education programs to members that help grow their business, resources to assist local association educational endeavors and partnership opportunities/possibilities that bring quality programs to members.

Brief description of how the PPSA contributes to achieving AAR's vision (REAL Solutions):

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

Importance of PPSA to the critical-to-serve customer:

Access to quality educational programs to enhance skills, manage risk, and focus on new and core competencies and trends are necessary to help members succeed in the marketplace. AAR's involvement in the development and delivery in educational programs positions the REALTOR associations as the ultimate in post licensing education.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Partnership opportunities are provided to local associations to offer REBAC designation and certification courses to members in a favorable financial environment.	
Educational programs are offered that address the needs of the members in helping them grow their business and prepare for changing trends in the	

industry.	
A forum for local education staff and ADRE (updates and Q&A on school process, policies, guidelines) is provided.	
Effective communication strategies are developed and utilized to inform members of educational opportunities, including a calendar that is accessible 24/7.	
Resources are available to local education staff and volunteers charged with overseeing or developing their education endeavors.	
Cross marketing strategies are utilized to promote designation and certification courses where appropriate.	
A list of colleges is compiled that offer real estate degrees in Arizona.	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Education Development

This program includes curriculum development, tools for delivery, and development resources/training

Brief description of how the PPSA contributes to achieving AAR’s vision:

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.

Importance of PPSA to the critical-to-serve customer:

Utilizing the most effective education delivery vehicles and quality training/tools contributes to more professional and successful members and offers risk reduction strategies.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Established quality standards are followed in developing curriculum for all AAR education programs to help set the bar for excellence in education.	
The spectrum of delivery systems is broadened and monitored to deliver education to the members.	
Remote-delivery classroom volunteer monitors and instructors are trained in the chosen AAR platform.	

A library of AAR c/e courses which can be delivered live or remote is developed, monitored and maintained.	
A vehicle is used, available and monitored for members to review and comment on instructors and courses.	
Emerging education trends are monitored throughout the year and programs developed which are responsive to the changing industry and needs of members.	
Trends (content and delivery platforms) are closely monitored to ensure AAR utilizes the most effective delivery systems and technologies..	
Assistance is available, when appropriate, to help enhance prelicensing and postlicensing curriculum criteria and/or the ADRE processes.	
Tools or resources are available to help members assess their own skills and identify where they need to hone their skills and knowledge	

ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN

Program, Product, Service or Activity (PPSA):

Instructor Development

This program includes REteach, ME Certification program, Forum/IDWs and resources

Brief description of how the PPSA contributes to achieving AAR's vision:

The skill-set of instructors is important in ensuring learning takes place. 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 develop or hone their skills.

Importance of PPSA to the critical-to-serve customer:

The availability of quality education and training through competent instruction sets AAR's education endeavors as the ultimate in real estate education.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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X AAR delivers preeminent educational programs and resources that positions AAR members to succeed in the real estate industry.

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Measurable objectives:

Measurable objectives	Status
Opportunities are available for instructors to communicate and share with each other	
AAR qualifies all its instructors against established instructor criteria and offers an Instructor Certification Program to all instructors who desire to earn the certification	
Opportunities are available for instructors to examine their subject knowledge through self-assessment tools.	

Incentives are offered, where applicable, to encourage local associations to engage ME certified instructors when offering AAR courses.	
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**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Industry Partners Conference

Brief description of how the PPSA contributes to achieving AAR's vision (REAL Solutions):

This plan affords AAR an opportunity to partner 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.

Importance of PPSA to the critical-to-serve customer:

Members must have not only skills and knowledge but also an understanding of the role each partner plays in a real estate transaction. This conference raises the level of knowledge and understanding between the partners which ultimately leads to raising the level of professionalism in each of the three industries.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Measurable objectives	Status
An educational program, through partnership program with AMLA and ASEA, is offered to help members understand each others role in the real estate transaction.	
The Industry Partners Conference is evaluated annually to ensure it meets the needs of our members.	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Leadership Training & Development

This program includes *Leadership Conference, resources and development*

Brief description of how the PPSA contributes to achieving AAR's vision:

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.

Importance of PPSA to the critical-to-serve customer:

Preparing incoming and emerging REALTOR leaders is essential in a membership organization.

Strategic Focus Points: [Indicate one(s) the PPSA address(es)]

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Measurable objectives:

Measurable objectives	Status
AAR celebrates the accomplishment of outgoing president and install incoming officers at the annual Leadership Conference.	
Training is available to prepare incoming leaders to fulfill their incoming leadership roles.	
Members are aware of opportunities to serve in leadership and committees within AAR.	
Opportunities for volunteer leaders to network with	

each other is available to state and local leadership.	
Resources are compiled and available to to assist or develop future leaders.	
The feasibility of offering the LTA or a portion of the LTA program is studied and implemented (if determined it is wanted).	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

MRE Society

The MRE Society is a membership society recognizing members educational accomplishments/commitment and provides a tool to differentiate themselves from their peers as well as provide a career path for member's growth

Brief description of how the PPSA contributes to achieving AAR's vision (REAL Solutions):

This plan provides a recognition and marketing vehicle for members to assist in positioning themselves as trusted, knowledgeable and skilled professionals.

Importance of PPSA to the critical-to-serve customer:

Members who continue to educate themselves contribute toward elevating the professionalism in the real estate profession.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Measurable objectives	Status
A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments	.
A program or resources are identified and/or developed to help facilitate career growth/path for new members or members looking to take their career to the next level	
Input from MRE Society members is solicited and reviewed annually regarding the value of the program.	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Member Communication

This program includes website, social media vehicles, outreach activities, website, magazine/newsletters

Brief Description of How the PPSA Contributes to Achieving AAR's Vision:

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.

Importance of PPSA to the Critical-to-Serve Customer:

Receiving timely information when and how members want enables them to become better prepared, more knowledgeable and increase their professionalism and success. Utilizing a variety of innovative vehicles ensures members receive information that best meets their needs and preferences.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable Objectives:

Measurable objectives	Status
Pertinent, relevant and timely industry and association information is broadcast to members utilizing all methods of electronic/print/media delivery (i.e., social networks, e-publishing, website, video, newsletters or magazine, etc).	
Trends inside and outside of the real estate	

industry are monitored throughout the year.	
Members are aware of AAR's value proposition and relevancy to their business practice through key WIIFM messages in AAR's communication strategies.	
Opportunities are available for members to share their insights and engage with content through comments polls, contests, etc.	
Communication vehicles are closely monitored, evaluated and evolve as needed.	
Options are explored to identify members preferred communication methods and steps taken to delivery information the way members want to receive it.	
Communication briefs for each of AAR's communication vehicles are maintained and evaluated annually.	
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	
A modern, functional website which provides information and resources to members 24/7 is maintained and enhanced as needs expand and technology evolves.	
Print and digital collateral adheres to the AAR brand and is member centric and speaks to AAR's value proposition.	
The use of video communication is expanded.	
Communication statistics are compiled and reviewed monthly.	
Development of a mobile app is researched and developed, if desirability is identified.	
Marketing collateral is available and used to promote AAR programs, products and services, where appropriate.	
Workgroups, task forces, and/or advisory groups are utilized to shape and enhance AAR's communications efforts	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

REALTOR Institute: GRI Designation

(This program includes administration, instructors, curriculum, delivery, development & maintenance, marketing, scholarships)

Brief description of how the PPSA contributes to achieving AAR's vision:

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, including the rollout of the new curriculum in 2014.

Importance of PPSA to the critical-to-serve customer:

Members who make the commitment to a high level of professional education secure a strong educational foundation enabling them to better serve and protect their clients.

Strategic Focus Points: *[Indicate one(s) the PPSA address(es)]*

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Measurable objectives:

Measurable objectives	Status
The GRI program is available to members throughout the state.	
Partnership opportunities are available to local associations and firms who wish to deliver the GRI courses to their members.	
The program is evaluated for effectiveness, structure and format to ensure it offers unsurpassed curriculum and meets the needs of our members.	
The new GRI program is rolled out in 2014 and	

continually evaluated and updated to be responsive to the changing industry and needs of our members.	
The GRI program incorporates introductory designation and certification courses into the curriculum where appropriate.	
A cadre of qualified instructors who meet the established GRI instructor criteria and AAR Instructor certification standards are maintained and monitored.	
Communication platforms and tools are used to inform members of the GRI program and its benefits to building a successful career.	
Outreach efforts are employed to build broker support of the GRI program.	
Resources are available to provider-partners to help to deliver and promote the courses.	
New designees are recognized where appropriate and provided resources to help them promote their accomplishment.	
Proactive efforts are made to work toward developing/offering more online options for earning the GRI designation.	
A financial scholarship program is available to members and evaluated annually	
Advanced tools and processes are utilized to ensure administration of the program is streamlined and efficient.	
Curriculum development and maintenance adhere to established curriculum standards.	
National trends in each states GRI programs are monitored to keep AAR's GRI program growing and evolving.	

**ARIZONA ASSOCIATION OF REALTORS®
2014 BUSINESS PLAN**

Program, Product, Service or Activity (PPSA):

Spring Conference

Brief description of how the PPSA contributes to achieving AAR's vision:

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.

Importance of PPSA to the critical-to-serve customer:

To succeed in this business, our members cannot continue to do the same things the same way. The conference meets this challenge by providing information in a "Kiplinger" format on legal/regulatory and business practice issues. This affords our member with an opportunity to meet peers from across the state. Referrals are a very big part of our industry: when referring a member/client to another REALTOR®, it is very important that the other REALTOR® is up-to-date on the industry issues, has integrity and has a personality match with the member/client being referred.

Strategic Focus Points: [Indicate one(s) the PPSA address(es)]

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Measurable objectives:

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 networking opportunities and information exchange	
Cutting-edge and emerging technologies are incorporated into the program and marketing efforts where possible.	

Positive feedback is received.	
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Education Outreach Program Update

Bullhead City/Mohave Valley Association

February 5-6 ABR: Evan Fuchs

Scottsdale Area Association

Jan 16 rCRMS Federal Issues: Mary Frances Coleman
 Jan 30-31 SRES: Frank Dickens
 February 6 Military Relocation Specialist: Stacey Onnen
 March 6-7 SRS: Holly Mabery
 April 25 rCRMS Successful Closing: Mary Frances Coleman
 May 15-16 rCRMS Contract: Mary Frances Coleman
 June 6 rCRMS Agency: Rick Mack/Frank Dickens
 July 14 Property Mgmt Bootcamp: Sue/Mike/Denise
 August 1 Marketing Reboot: Evan Fuchs
 Sept 19 Gen-Buy: Paula Monthofer
 Dec 11-12 ABR: Holly Mabery

SEVRAR

January 13 3 P's of Broker Audts: Jim Sexton, Commissioner Lowe, Sue Flucke March 24-25
 SRES: Frank Dickens
 April 28-29 ABR: Evan Fuchs
 June 13 Marketing Reboot: Stacey Onnen
 July 25 rCRMS Agency: Rick Mack/Frank Dickens
 August 22 rCRMS Federal Issues: Mary Frances Coleman
 Sept 10 ePRO: Evan Fuchs
 Sept NAR Tech Edge
 Nov 4 Generation Buy: Paula Monthofer
 Dec 3-4 rCRMS Contract: Mary Frances Coleman

WEMAR

Jan 24 rCRMS Federal Issues: Mary Frances Coleman
 April 11 Property Management Bootcamp: Sue, Denise, Mike

Phoenix

June 18 rCRMS Federal Issues: Rick Mack/Frank Dickens

West USA

January 31 rCRMS Leasing: Sue Flucke/Denise Holliday

Remote Delivery Update

February 3, 5, 12	GREEN
February 4	RSPS (Holly Mabery)
Feb 18	rCRMS Federal Issues (Frank/Rick)
Mar 17	Marketing Reboot (Stacey Onnen/Holly Mabery)
March 24	Military Specialist Designation (Holly Mabery)
April 21	rCRMS Agency (Rick Mack/Frank Dickens)
May 8	G-Transaction Technology (Holly /Stacey)
May 19	rCRMS Successful Closing (Mary Frances Coleman)
June 10	G-Financing (Patrick Ritchie)
June 12	Gen Buy (Evan Fuchs & Paula Monthofer)
July 21-22	SRS (Frank Dickens)
Aug 18-19	ABR (Evan Fuchs)
September 9	G-Customer Satisfaction (Evan Fuchs)
Sept 15	rCRMS Disclosure (Frank Dickens/Rick Mack)
Oct 20-21	SRES (Frank Dickens)
October 27	New Home Specialist (Holly Mabery/Stacey Onnen)
October 28	Military Specialist (Holly Mabery/Stacey Onnen)
Nov 18	G-Market Essentials (Holly Mabery/Stacey Onnen)

Remote locations to date:

Yuma
 Prescott
 Sedona
 Northern Arizona??

*Note: February GREEN classes – AAR will be a remote location for the Texas Association of REALTORS

Broker University Overview

MyBrokerCoach

Annual Broker Seminar

Welcome New Broker (new)