

Arizona Association of REALTORS®
Professional & Business Development Committee
 June 12, 2014
 Agenda

- | | | |
|-------|---|---------|
| I. | Call to Order – Chair Lori Doerfler | |
| II. | Approval of March 20, 2014 Minutes | Page 2 |
| III. | Measureable Objective Update | Page 4 |
| IV. | April Spring Convention Recap
evaluation recap:
https://www.surveymonkey.com/sr.aspx?sm=61_2bCUFXhKSBI8RPbLi0ddS7dZ9Qr5Rw5DfxBbacnNf8_3d | Page 17 |
| V. | Updates: | |
| | A. Education Outreach Program – Barb Freestone | Page 18 |
| | B. Remote Delivery Update – Barb Freestone | Page 19 |
| | C. Broker University – Holly Eslinger | Page 22 |
| | D. GRI – Stacey Onnen | |
| | E. Leadership Development Program – <i>Holly Mabery</i> | |
| VI. | Unfinished Business | |
| | A. Hear It Direct | Handout |
| | B. Other | |
| VII. | New Business | |
| | A. REteach.us Site Redirection | Page 27 |
| | B. NAR REALTOR Party Meeting recap | |
| | C. 2015 AAR Strategic Plan Draft | handout |
| VIII. | General discussion | |
| | A. ADRE stats | handout |
| | B. Issues or challenges in the marketplace that should be addressed through communication or education? | |
| | C. RAPAC | |
| | D. Other | |
| IX. | Future Meetings
September 25 (change??)
November 20 | |
| X. | Adjourn | |

Arizona Association of REALTORS
Professional & Business Development Committee
March 20, 2014
Minutes

The regularly scheduled meeting was called to order by Chairperson Doerfler at 1:00 p.m. A quorum was present.

Present

Lori Doerfler
Gary Nelson
Vicki Lind
Sasha Lopez
Holly Mabery
Stacey Onnen
Vicki Cleman
Frank Dickens
Cathy Erchull
Christopher Paris
Mike Wasmann (phone)
Holly Eslinger (phone)
Flo Day (phone)
Sue Flucke (phone)
Janet Kane (phone)
Evan Fuchs (phone)

Staff

Barbara Freestone
Brittni Matt
Bethany Brannan
Kimberly Franzen
Calie Waterhouse

There being no corrections, the minutes of January 16 were approved.

Updates were provided on the measureable objectives, spring convention, MRE Society, education outreach and remote delivery.

MOTION: Made, seconded and carried that there be a minimum of 3 students in a remote classroom.

It was also noted that the effectiveness of delivering remotely a two-day class was a concern and will be carefully evaluated after the first two-day class is delivered.

Holly Eslinger presented planned Broker Summit content and format. Date for the Summit is anticipated to be June . Holly also reported the workgroup will be addressing a broker-only page on the website and development of a broker toolkit at their April 30 meeting.

Stacey Onnen provided an informational report on the activities in the GRI Oversight Workgroup since the January meeting.

MOTION: Made, seconded and carried to approve the Leadership Development Program as presented. (Frank and Holly abstained from voting)

MOTION: Made, seconded and carried to request an allocation of \$21,580 from the Executive Committee to rollout Module 1 and Module 2 this year. (Frank and Holly abstained from voting)

MOTION: Made, seconded and carried to offer the 2014 Instructor Summit as presented.

Bethany Brannan provided an update on the communication activities and stats.

MOTION: Made, seconded and failed to include the following activities on the AAR web calendar:

MOTION: Made, seconded and carried AS AMENDED to include only those classes/events that AAR is participating in on the AAR web calendar.

AMENDMENT: Made, seconded and carried to include local association designation & certification classes as well as local association special events on the AAR web calendar.

Chairperson Doerfler asked Sasha Lopez to work with a few volunteers and bring back full recommendations including budget draft, interest level, proposed timing and location, and commitment/cancellation policy with the Hear It Direct provider. Christopher Paris volunteered to help Sasha.

Next Meeting: June 12, 2014 1:00

Adjourn: There being no further business, the meeting was adjourned at 3:00 p.m.

PROFESSIONAL & BUSINESS DEVELOPMENT MEASUREABLE OBJECTIVE UPDATE 2014
--

Measureable Objectives Update

Support & Resources

Measurable objectives	Status
Resources and tools are available to develop, offer, market or communicate programs and products within this business plan.	Twitter: classroom tweets with content nuggets
Appropriate groups are updated and provided information throughout the year.	Ongoing
Emerging technology, medias and platforms are used, where appropriate, to deliver products and services to members throughout the state.	GoToWebinar – Dodd Frank – March 12 Learning Library – GRI Business Planning online course
Staff continually develops the needed knowledge and skills to develop educational programs/products that are responsive to member needs and changes in the industry	Worked with Sue Flucke to develop Anatomy of the Lease Agreement class. In the process of developing an advanced Property Management Bootcamp
An effective and efficient learning management system is utilized to develop and host AAR's online education.	Partnered with NAR's Learning Library to convert MyBrokerCoach and develop online versions of the Broker Management Clinics
Opportunities are identified and utilized to partner with allied groups or vendors when appropriate	Discussions with ARMLS and HAREP regarding HeartDirector program

Broker University

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.	Survey conducted in March Annual Broker Summit held June 3 (70 attended)
Partnership opportunities are explored that bring quality programs to our brokers when partnering is more advantageous than developing.	CRB - brought their video series into the MyBrokerCoach program CRB - received permission to reprint their sales meeting templates - working on putting them into a package which will be housed on the website in the Broker University area
Communication strategies and tools are employed to build broker support and awareness of programs, products and resources available to them	Facebook ad for MyBrokerCoach ran for two weeks (reached 16,500; 222 clicks)

A blended learning program, MyBrokerCoach is offered to develop or enhance brokers skills in operating a successful real estate brokerage.	Completed
Broker satisfaction with broker-related services are monitored and measured.	Positive feedback from the June Broker Summit
A dedicated “broker” page is available on the AAR website and continually updated to address the needs of the brokers.	In process of reviewing and developing recommendations

rCRMS (Certified Risk Management Specialist) 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.	<ul style="list-style-type: none"> • Federal Legal Issues – Scottsdale, Jan 16 (22 attended) • Federal Legal Issues - WeMAR, Jan 24 (34 attended) • Leasing Essentials – West USA Realty, Jan 31 (41 attended) • Federal Legal Issues – AAR, Feb 18 (15 attended) • Employment, Agency, Standard of Care – AAR, April 21 (54 attended) • Essential Skills – Scottsdale, April 25 (25 attended) • Mastering Residential Resale Transaction – Scottsdale, May 15/16 (34 attended) • Essential Skills – AAR, May 19 (34 attended)
A cadre of qualified instructors to deliver the rCRMS courses is maintained and monitored.	On-going Frank Dickens, Sue Flucke, Mary Frances Coleman, Rick Mack, Denise Holliday
Members are aware of the value of the rCRMS program through key “WIIFM” messages.	Included in AAR booths at events
A variety of marketing materials are developed and utilized to promote the rCRMS program.	Plans to revise the rCRMS brochure this fall
Newly certified members are recognized through appropriate AAR vehicles.	Listed on website
Options to create online delivery of the rCRMS program is explored and developed where feasible	Currently approved for remote delivery CRMS Employment, Agency & The Standards of Care CRMS: Essential Skills for a Successful Closing. CRMS: Disclosure & Due Diligence. CRMS: Federal Legal Issues. CRMS: Claims & Remedies.

Education Outreach

Measurable objectives	Status
Partnership opportunities are provided to local associations to offer REBAC designation and certification courses to members in a favorable financial environment.	Partnerships formed to date with: <ul style="list-style-type: none"> • SEVRAR • Scottsdale • Bullhead City

	<ul style="list-style-type: none"> • WEMAR • West USA • Lake Havasu • Northern Arizona • Tucson • Yuma • White Mountains • Coldwell Banker Success Day <p>Revenue share/subsidy to date:</p> <ul style="list-style-type: none"> • Scottsdale-SRS: \$452.63 • Scottsdale subsidized \$115 loss for SRES class • SEVRAR-3Ps: (\$616) • SEVRAR-SRES (\$419.27) • WEMAR: (\$824) • WEMAR-PMB (\$1089.99) • West USA-Leasing: • Lake Havasu-PMB (\$777.64) • BHC ABR - Subsidized \$443.94 loss • SEVRAR-ABR (\$643.05) • Yuma MRP - Subsidized \$56.42 loss • Tucson Trust Accounting (\$58.23) • Scottsdale-rCRMS Contract class (\$825.28) • Scottsdale - rCRMS Essential Skills class (\$530.92) • White Mountains PMB (\$24.12) • Yuma MRP - subsidized \$56.42 loss •
<p>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.</p>	<p>SEVRAR</p> <ul style="list-style-type: none"> • 3P's of Broker Audits – Jan 13 (86 attended) • SRES – Mar24/25 (23 attended) • ABR – April 28/29 (31 attended) <p>Scottsdale</p> <ul style="list-style-type: none"> • SRES – Jan 30/31 (17 attended) • MRP – Feb 6, (15 attended) • SRS – Mar 6/7, (23 attended) <p>AAR</p> <ul style="list-style-type: none"> • RSPS – Feb 4, (14 attended + 8 at remote locations) • BPO – Feb 28, (Cancelled) • Marketing Reboot – Mar 17 (28 attended) • MRP – Mar 24 (12 attended)

	<p>Bullhead City</p> <ul style="list-style-type: none"> • ABR – Feb 5/6, (10 attended) <p>Lake Havasu</p> <ul style="list-style-type: none"> • Property Management Boot Camp – Mar 14 (38 attended) <p>Northern Arizona</p> <ul style="list-style-type: none"> • SRES – March 27-28 (cancelled) • SRS (cancelled) <p>WeMAR</p> <ul style="list-style-type: none"> • Property Management Boot Camp – April 11 (54 attended) <p>Tucson</p> <ul style="list-style-type: none"> • Property Management Trust Accounting – April 23 (53 attended) <p>Yuma</p> <ul style="list-style-type: none"> • MRP – April 24 (20 attended) <p>White Mountain</p> <ul style="list-style-type: none"> • Property Management Bootcamp - May 30 (24 attended)
A forum for local education staff and ADRE (updates and Q&A on school process, policies, and guidelines) is provided.	
Effective communication strategies are developed and utilized to inform members of educational opportunities, including a calendar that is accessible 24/7.	Ongoing – calendar AAR present at Eagle University and Coldwell Banker Quarterly event
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.	e-blast marketing include a list of upcoming classes
A list of colleges is compiled that offer real estate degrees in Arizona.	Research completed - there are no Arizona colleges/universities that offer a specific real estate degree. Many offer real estate classes that count toward another degree program and some offer classes that count for prelicensing

Education Development

Measurable objectives	Status
Established quality standards are followed in developing curriculum for all AAR education programs to help set the bar for excellence in education.	Course Certification criteria is utilized as a checklist when developing or revising courses

<p>The spectrum of delivery systems is broadened and monitored to deliver education to the members.</p>	<p>Classes approved to date for remote delivery include:</p> <ul style="list-style-type: none"> • CRMS Employment, Agency & The Standards of Care • CRMS: Essential Skills for a Successful Closing. • CRMS: Disclosure & Due Diligence. • Federal Legal Issues. • Claims & Remedies. • Contracts, Clauses & Contingencies. • What your buyer doesn't know can hurt you • BMC #1 Statute & Rules • BMC #2 Broker Policies • BMC #3 Supervision • Gen Buy • Generation Buy • Practical Side of Fair Housing • Overview of AAR Property Management Forms • Fair Housing for Property Managers
<p>Remote-delivery classroom volunteer monitors and instructors are trained in the chosen AAR platform.</p>	<p>Completed</p>
<p>A library of AAR c/e courses which can be delivered live or remote is developed, monitored and maintained.</p>	<ul style="list-style-type: none"> • BMC 1,2 and 3 • Sticky Situations • Real Sticky Situation • Contacts Clauses & Contingencies • A Practical Guide to Fair Housing • Anatomy of a Lease Agreement • Do It Right or Get Out of Property Management • Risky Business • What Your Buyer Doesn't Know Can Hurt You
<p>A vehicle is used, available and monitored for members to review and comment on instructors and courses.</p>	<p>REteach.us</p>

Emerging education trends are monitored throughout the year and programs developed which are responsive to the changing industry and needs of members.	Ongoing. New classes developed that address the AAR Property Management Forms as well as fair housing for property managers. Also offered class on trust accounting issues
Trends (content and delivery platforms) are closely monitored to ensure AAR utilizes the most effective delivery systems and technologies..	Ongoing Tweeting from classes to enhance member awareness of the content value
Assistance is available, when appropriate, to help enhance prelicensing and postlicensing curriculum criteria and/or the ADRE processes.	Ongoing. Paired a prelicensing instructor up with Andy Israel to assist in areas Cliff's students were struggling in
Tools or resources are available to help members assess their own skills and identify where they need to hone their skills and knowledge	

Instructor Development

Measurable objectives	Status
Opportunities are available for instructors to communicate and share with each other	Contract IDW to be scheduled late summer
AAR qualifies all its instructors against established instructor criteria and offers an Instructor Certification Program to all instructors who desire to earn the certification	On-going
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.	

Industry Partners Conference

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.	Planning will begin in April
The Industry Partners Conference is evaluated annually to ensure it meets the needs of our members.	

Leadership Training & Development

Measurable objectives	Status
AAR celebrates the accomplishment of outgoing president and installs 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 are available to state and local leadership.	
Resources are compiled and available 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).	Program approved. Content development in process. Proposed dates: September 25-26: Module 1 December 3-4: Module 2 January 15: Module 3 February 26: Module 4

MRE Society

Measurable objectives	Status
A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments 1	Marketing efforts consisted of: 7 e-blasts sent to expiring members, New GRI designees, and all of AAR's membership 2014-2015 term: 51 members
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	Career path - Anticipate proposal in late summer C/E class scheduled for July 26 - David Gilpatrick will be teaching It's Not My Fault.
Input from MRE Society members is solicited and reviewed annually regarding the value of the program..	Annual MRE survey planned for September.

REALTOR Institute: GRI Designation

Measurable objectives	Status
The GRI program is available to members throughout the state.	12 associations offering live GRI classes 10 associations offering classes via live remote feed 2 firm offered GRI (Prudential and WestUSA) 54 GRI classes scheduled in 2014
Partnership opportunities are available to local associations and firms who wish to deliver the GRI courses to their members.	8 associations offering classes via live remote feed 10 associations offering live GRI cases 1 firms sponsored a class
The program is evaluated for effectiveness, structure and format to ensure it offers unsurpassed curriculum and meets the needs of our members.	Ongoing review of course evaluations and feedback from students.
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.	On-going January classes: <ul style="list-style-type: none"> • rCRMS Fed Legal Issues – 13 GRI credit • rCRMS Fed Legal Issues – 29 GRI credit • SRES – 4 GRI credit February classes <ul style="list-style-type: none"> • RSPS – 3 GRI credit • ABR – 6 GRI credit • MRP – 0 GRI credit • rCRMS Fed Legal Issues – 10 GRI credit
The GRI program incorporates introductory designation and certification courses into the curriculum where appropriate.	rCRMS and REBAC classes approved for GRI credit
A cadre of qualified instructors who meet the established GRI instructor criteria and AAR Instructor certification standards are maintained and monitored.	On going 21 instructors Two new instructors approved in February
Communication platforms and tools are used to inform members of the GRI program and its benefits to building a successful career.	GRI Facebook page GRI Website E-blasts about the program
Outreach efforts are employed to build broker support of the GRI program.	Eblast to Brokers about scholarship (19% open (445); 1.2% click thru (28)
Resources are available to provider-partners to help to deliver and promote the courses.	GRI videos available to providers Flyer templates available to providers Series of ads available to providers
New designees are recognized where appropriate and provided resources to help them	New designees are announced on GRI facebook group as well as the

promote their accomplishment.	GRI webpage. List of new designees also sent to local association AE's and presidents
Proactive efforts are made to work toward developing/offering more online options for earning the GRI designation.	The NAR designation/certification courses that are approved for GRI credit are offered online Arizona's business planning module is offered online
A financial scholarship program is available to members and evaluated annually	1st Qtr - 35 2nd Qtr - 44 3rd Qtr - 75 The GRI Get Smart Sweepstakes ran through March 31st: \$2,000 in fund. Winners: Pamela Thayer & Rebecca Good
Advanced tools and processes are utilized to ensure administration of the program is streamlined and efficient.	Ongoing
Curriculum development and maintenance adhere established curriculum standards.	Most of the course curriculum has been rewritten and field tested in the fall of 2013. Positive feedback from evaluations students
National trends in each state's GRI programs are monitored to keep AAR's GRI program growing and evolving.	On-going

Spring Convention

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	April 15-18, 2014 423 registered which includes: 75-Tuesday only 37 - Wednesday only 30 - Thursday only 14 confirmed vendors 4/22/14 Positive feedback received PAAR and Sedona offered promotional incentives to their members
Cutting-edge and emerging technologies are incorporated into the program and marketing efforts where possible.	QR codes on badges, daily eblast to attendees with schedule/reminders Twitter contest, Twitter feed throughout the conference along with Facebook advertising Paperless schedules onsite (posters vs. paper schedules)
Positive feedback is received.	Positive feedback was received

Member Communication (January through April. Moved under Operations Area in May)

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).	AAR currently disseminates information via the following channels: Website, Social media channels, monthly e-Magazine, Quarterly e-Blast to Brokers, and the AAR blog.
Trends inside and outside of the real estate industry are monitored throughout the year.	Currently working on stories related to "How to retire?", "Impact of Biggert Waters". Ron LaMee and Nicole LaSlavic will now be contributing articles on RAPAC and Market Trends to the AZR.
Members are aware of AAR's value proposition and relevancy to their business practice through key WIIFM messages in AAR's communication strategies.	AAR is focusing this year on expanding the exposure of our volunteers through a monthly Volunteer Spotlight series. To date, we've interviewed Kent Simpson and Bob Hertzog. We're also going to feature: Nick Bastian and Doug Groppenbacher
Opportunities are available for members to share their insights and engage with content through comments polls, contests, etc.	Polls are currently active on AAR's site, as are social social sharing buttons on the website. Comments are open on most AAR articles (excluding legal) and on most blog posts. Recent polls include: <ul style="list-style-type: none"> • What is the most important quality you look for in an instructor • Do you understand the new Dodd-Frank Wall Street Reform and Consumer Protection Act (23 responses) • How long have you been a

	<p>REALTOR (110 responses)</p> <ul style="list-style-type: none"> Who are you? (157 responses)
Communications vehicles are closely monitored evaluated and evolve as needed.	AAR produced the first <i>Arizona Broker/Manager Quarterly</i> (ABMQ), e-Magazine in March 2014. This publication is broker-specific and eliminates the duplicity of content in the now discontinued <i>Arizona REALTOR® Quarterly</i> and the Broker/Manager Risk Management Update. As of 4/14, the ABMQ has been viewed 500 times online and been downloaded by 37 people.
Options are explored to identify members preferred communication methods and steps taken to delivery information the way members want to receive it.	AAR's last communications survey was in July 2013. In 2014, AAR will be working with nSight marketing to audit our communications vehicles. First meeting with Mission:Connect 2/28/2014 To date, focus groups have been held at AAR, Prescott, WEMAR and SEVRAR to gauge member feedback. Meetings held in April and June.
Communication briefs for each of AAR's communication vehicles are maintained and evaluated annually.	<p>Communications briefs exist for the following communications vehicles: Arizona REALTOR® magazine, Arizona Broker/Manager Quarterly, Website, Twitter, Facebook, Blog.</p> <p>Utilizing the Mission:Connect project to update and analyze communications briefs.</p> <p>Communication briefs in place for the following AAR vehicles: Blog, twitter, facebook, AZR, website</p>
Social media channels are managed and monitored to ensure a steady rise in engagement and alternate sources for members to receive information.	AAR uses a combination of Hootsuite and Google Alerts to monitor AAR's social media channels. AAR continues to see a rise in followers within its social media channels. As of 2/24/2014, AAR's social media stats are: Facebook: 5,944 likes Twitter: 6,136 followers Google+: 65 followers Linkedin: 919 followers YouTube: 189 subscribers
A modern, functional website which provides information and resources to members 24/7 is maintained and enhanced as needs expand and technology evolves.	AAR's website received 87,834 unique pageviews in January 2014. We are currently in the testing phases of a beta opt-in functionality that would allow users to opt in to the following content types: <ul style="list-style-type: none"> zipForm Updates eSign Updates Legal Articles: Property Management Legal Articles: New AAR Forms Buyer Advisory Updates Spanish Forms
Print and digital collateral adheres to the AAR brand and is member centric and speaks to	AAR currently employs a brand/graphics standards manual and implements the

AAR's value proposition.	structure within all AAR print and digital collateral. Recent collateral pieces are the new GRI brochure and the Member Benefits brochure (in development)
The use of video communication is expanded.	Utilized video for President's Quarterly Message; Ask Scott. Promotion of Spring Convention and video testimonials for classes.
Communication statistics are compiled and reviewed monthly.	<p>January Stats Web</p> <ul style="list-style-type: none"> • Unique Visits: 19,253 • Unique Page Views: 87,834 <p>January Stats Arizona REALTOR® Magazine</p> <ul style="list-style-type: none"> • Opens: 17,827 (33.59%) • Click-Throughs: 2,804 (9.63%) <p>January Stats Blog</p> <ul style="list-style-type: none"> • Unique Visits: 2,597 • Page Views: 4,344 <p>February Stats Web</p> <ul style="list-style-type: none"> • Unique Visits: 17,982 • Unique Page Views: 80,537 <p>February Stats Arizona REALTOR® Magazine</p> <ul style="list-style-type: none"> • Opens: 15,784 (30.78%) • Click-Throughs: 2,508 (8.77%) <p>February Stats Blog</p> <ul style="list-style-type: none"> • Unique Visits: 2,209 • Page Views: 3,452 <p>March Stats Web</p> <ul style="list-style-type: none"> • Unique Visits: 19,395 • Unique Page Views: 83,243 <p>March Stats Arizona REALTOR® Magazine</p> <ul style="list-style-type: none"> • Opens: 7,639 (25.78%) • Click-Throughs: 1,190 (4.02%) <p>March Stats Blog</p> <ul style="list-style-type: none"> • Unique Visits: 2,349 <p>Page Views: 3,756</p> <p>Unique log-ins to access password protected content: Jan 2014: 16,000 Feb 2014: 17,500 Mar 2014: 15,000</p>
Development of a mobile app is researched and developed, if desirability is identified.	Referred to new Communication Manager & Operations Area
Marketing collateral is available and used to promote AAR programs, products and services, where appropriate.	AAR currently uses many types of marketing collateral to promote services, products and events. The most commonly used print collateral includes class flyers and designation information that is distributed at industry events. AAR is currently developing collateral to support the upcoming Spring Convention.

	We also finalized the Member Resource Guide that is available in both a print and digital version.
Workgroups, task forces, and/or advisory groups are utilized to shape and enhance AAR's communications efforts	Reached out to communications workgroup for story sources and ideas for upcoming issue.

Spring Convention Recap

April 15-18, 2014

Attendance:

423 registered which includes:

75-Tuesday only

37 - Wednesday only

30 - Thursday only

Vendors:

14 confirmed vendors

Positive feedback received

Promotional Efforts:

PAAR and Sedona offered promotional incentives to their members

targeted eblasts to members

Facebook advertising

New and different:

QR codes on badges, daily eblast to attendees with schedule/reminders

Twitter contest, Twitterwall throughout the conference

Paperless schedules onsite (posters vs. paper schedules)

Speaker "I'll be Speaking" graphics for speakers to use

Suggestions from the Workgroup's recap meeting include:

- Consider more and spreading out c/e hours throughout the conference
- Consider reducing the number of breakout session topics and possibly offer repeats (possibly afternoon repeat morning topics)
- More agent specific topics (vs. broker specific topics)
- Be more description in the session descriptions
- Genius Bar - continue but put more structure to it
- Is 45 minutes too short??
- Consider 3 simultaneous breakouts at one time instead of 4
- Liked (and should continue) the mini activities
- Staff note: research possibility, criteria and feasibility of getting c/e credit for breakout sessions

Education Outreach Program Update

To date, AAR has partnered with the following associations or firms to offer live REBAC, rCRMS, or property management classes:

Bullhead City/Mohave Valley Association
Scottsdale Area Association
Lake Havasu
SEVRAR
WEMAR
Phoenix
Tucson
Yuma
White Mountains
West USA
Coldwell Banker Quarterly Event

The majority of the classes have produced a positive revenue share back to the local associations.


Remote Delivery Update

- April 21 rCRMS Agency (Rick Mack/Frank Dickens) 
- **Sedona - 5**
 - **Yuma - 2**
 - **Lake Havasu - 7**
 - **White Mountain - 2**
 - **Prescott - 18**
 - **Southeast AZ - 6**
- May 8 G-Transaction Technology (Holly Mabery /Stacey Onnen) 
- **Sedona - 2**
 - **Southeast AZ - 3**
 - **Douglas - 1**
- May 19 rCRMS Successful Closing (Mary Frances Coleman) 
- **Yuma - 2**
 - **Lake Havasu - 4**
 - **White Mountain - 8**
 - **Prescott - 9**
 - **Southeast AZ - 2**
- June 10 G-Financing (Patrick Ritchie) 
- **Sedona - 4**
 - **Yuma - 8**
 - **Lake Havasu - 4**
 - **Southeast AZ - 3**
 - **Bullhead - 3**
- June 12 Generation Buy (Evan Fuchs & Paula Monthofer) 
- **Sedona - 1**
 - **Yuma - 0**
 - **Lake Havasu - 4**
 - **White Mountain - 0**
 - **Prescott - 5**
 - **Santa Cruz - 0**
- August 18-19 Broker Management Clinics (Evan Fuchs) 


- Sedona
- Green Valley
- Prescott
- Lake Havasu

September 9 G- Effective Strategies (Evan Fuchs) 


- Sedona
- Yuma
- Santa Cruz
- Southeast AZ
- Lake Havasu
- Douglas
- Bullhead

Sept 15 rCRMS Disclosure (Frank Dickens/Rick Mack) 

- Sedona
- Yuma
- Lake Havasu
- White Mountain
- Santa Cruz
- Southeast AZ
- Douglas
- Prescott

October 27 New Home Specialist (Holly Mabery/Stacey Onnen) 

- Sedona
- Yuma
- Lake Havasu
- Santa Cruz
- Southeast AZ
- Douglas
- Bullhead

October 28 Military Specialist (Stacey Onnen) 

- Sedona
- Yuma
- Lake Havasu
- Santa Cruz
- Southeast AZ
- Douglas

- Nov 18 G-Market Essentials (Holly Mabery/Stacey Onnen) 
- **Sedona**
 - **Yuma**
 - **Lake Havasu**
 - **White Mountain**
 - **Santa Cruz**
 - **Douglas**
 - **Southeast AZ**
 - **Bullhead**

Two associations expressed concern regarding the new minimum requirement of 3 students in a remote location

Cindy Beeman (Southeast Arizona): I respect the thought behind this but with Douglas such a small association we might have trouble meeting those requirements and then forcing them to travel a distance to participate.

Jan Ennenga (Yuma): Yuma concurs, though we do understand the rationale. Perhaps 2 students and a monitor, at least for the first year of offering the remote classes and then re-evaluate. We're hoping participation will increase as members see that the classes really are taking place. This comment is in regards to the one day course offerings, not the multi-day. Thanks so much!

Courses received approval for remote delivery since the last meeting include:

- Overview of AAR Property Management Forms
- Fair Housing for the Property Manager

We have received a few requests/suggestions to include some 3 hour c/e classes in the remote delivery

Broker University Update

The Annual Broker Summit was held June 3 2014 at the Chaparral Suites.

Topics included: current legal issues (including the topic of teams), RESPA/Marketing Service Agreements, E&O Policy, ADRE and legislative updates

Speakers included: Lisa Robinson, Amy Swaney, Rick Mack, Commissioner Lowe, Nicole LaSlavic and Mark Baker.

RAPAC and Broker Involvement Program promotions held in conjunction with the seminar. RAPAC raised \$190 with their wine toss and 9 brokers signed up for the Broker Involvement Program.

Seminar recap:

70 attendees
Feedback as positive

Work will begin in the coming weeks on two projects:

- 1) research feasibility of developing a broker-to-broker peer mentoring program with a recommendation presented to the PBD in September.
- 2) AAR IT staff completed development of a report identifying new DR's which will be used in sending a "welcome" message to new DR's as well as links to key information/programs geared for brokers such as legal hotline sign-up and a complimentary copy of the digital version of Arizona Real Estate: A Professional's Guide to Law and Practice.

**2014 Broker/Manager Summit
Claims, Cases, Causes & the CFPB
6/3/14 – Chaparral Suites
Evaluation Summary**

Attendance: 70

What is your overall rating of the content of the summit?

31-Excellent

13-Good

Fair

Poor

What did you learn today that you can apply into use in your daily business?

- New SPDS
- Review company policy
- Everything was fantastic
- Team stuff
- All of it x2
- Better understanding of state and federal enforcement focus, better understanding of RESPA guidelines, better understanding of legal issues arising
- Lisa's info invaluable
- Revisiting Dodd Frank - Rick Mack was extremely helpful
- Legal from Rick Mack and the commissioner is always very informative
- Good info on MSA's- risk management and Dodd Frank
- E&O- Frank Dodd, Teams, short sales
- Team issues and seller financing
- Industry issues regarding Amy's persecution- very important
- Team practices and regulations-trends-E&O office policy and independent contractor recommendations
- Need to up the education of my agents
- Review ads, review MLS input, new SPDS
- Something from each speaker
- Adding to listing checklist about leased equipment on homes
- Dodd Frank E&O, Teams, increase in short sales
- CFPB Judy Lowe's take and update
- Dodd-Frank- Stay away
- Short sale, Dodd Frank- teams E&O
- Amy-MSA's what to be aware of
- DRE rules governing teams, Amy re Dodd Frank
- Dodd Frank specific, Rick Mack's topics
- RESPA details and team payment issues, also better understanding of E&O coverage
- Several items x4
- Great information to verify policies. Risk management is always useful
- Many risk reductions- ideas to share with agents, review policy manual and all company policy agreements
- Broker role and teams
- Further related best practices. Fine tuning
- E&O importance

- E&O call risk management, understanding E&O wording, great info on teams
- Like E&O presentation, liked legal questions
- MSA's and what they really mean
- Great team information- insurance information regarding prior acts and renewal
- "real estate activity" definition seems to be expanding

What was the most valuable portion of the program?

- Comm. Judy Lowe-always wonderful x6
- Found all topics to be informative and valuable content. Having a panel up to question is a great learning tool for us all
- All of it x8
- Insurance
- Overall fine tuning
- Amy's updates and Nicole's explanation of lawsuit bill
- Rick's talk on what he's seeing
- Rick Mack- legal hotline, risk reduction
- Team leader possibility of being named in lawsuit of team member
- Up to date information- with so many changes this is very important- can't say 1 area was more valuable than the other. A lot of info in a short time but really makes you think about each topic- will now go back and apply to daily business
- Dodd Frank x2
- Seller financing
- CFPB- challenges
- Everyone was awesomely prepared- great staff!
- Actually they all had good key points. Teams, E&O, legal hotline
- Rick Mack and Lisa x3
- E&O insurance and what it does not cover x9
- The lawyer and team discussion
- Advertising
- Risk Management-CFPM, E&O information, RESPA rules and violations- to use as reference to update and review policies
- Commissioner and AAR legal department
- Legal issues
- CFPB info
- Team practices and regulation x2

What topics would you like a future AAR Broker Summit to cover?

- This should be a full day, lots of info- too much for 3 hours
- How do you get the owners and team leaders understand the rules and responsibilities of the designated broker
- More of the same
- Teams/unlicensed assistants
- Seller financing liabilities
- Next big trends-whatever they may be
- A panel would be nice-feedback to actual questions brokers are experiencing, would be a nice addition
- More "real life" scenarios of brokers
- Advertising anything , out of state/area referrals x2
- Same stuff
- Would love to see quarterly meetings for broker/managers on in the trend topics
- Broker supervision- or lack of?
- Property management
- Fair housing issues/rental management
- I like getting a current snapshot on key business management topics- lending, insurance, legal, Fed/state govt. and whatever topics/issues are emerging at time of meeting
- More on advertising-E.G. facebook x2
- open
- More, more
- Audit requirements and tips x2
- More in depth on Dodd Frank and review of the forms required
- Actual E&O claims, actual law suits- this helps us to see what leads up to the claim/suit happening
- Rental management
- Agent training/CE class improving
- Team policy manual
- Same topics-perhaps more time for legal hotline attorney
- Risk reduction
- Always love top legal hotline issues, teams for sure, advertising
- More on E&O
- Financing also great
- More on teams x2
- Q&A w/ Rick or R.E. attorney
- The practical side of filing an ethical complaint
- Let's look at a summit on teams
- Recent trends is excellent
- More online advertising guidelines

General Comments:

- Most speakers too general- would like more specifics (more time)
- Very good only weakness is it seemed a little rushed at times. I am a very new broker and would love a new broker seminar.
- Always appreciate time given us by commissioner Lowe and the updates she provides
- On risk management and Frank Doyd hear new speakers. Have heard Amy and Lisa 2 times this year at AAR events. Like to hear different perspective
- Lots of information crammed in, needed more time for some topics, Switch order of speaker to keep all brokers to the end. Broker involvement lost many brokers
- Thank you for offering classes like this one to brokers
- Great summit with valuable info. Good value
- So informative
- Good idea, let's have more
- Very informative, excellent
- Excellent and knowledgeable panel of presenters
- Our commissioner is awesome
- Too long
- May time for short round table, case work-networking paying of assistance of teams?
- More DB specific classes specific to day to day of large brokers advertising promotional, teams, RESPA giveaways, code of ethics
- Great presenters
- Excellent job, great stuff and organization of great speakers
- Recent trends is excellent
- Best in a long time
- Thank you!
- Excellent
- Commissioner Lowe- always informative
- Very informative. Good speakers
- It was nice to have a fast paced program with so many subjects covered- great updates
- Great seminar
- I would like to see these offered more times during the year

What is your Role?

- **Broker** **x6**
- **Designated Broker** **x16**
- **Broker/Owner** **x9**
- **Managing Broker** **x3**
- **Office manager- Ass. delegated broker**
- **Manager**
- **Consulting Broker** **x2**

Purpose of reteach.us

The primary purpose of the site is two-fold: 1) a place for members to read class reviews. Answering questions such as “Is a particular class worth taking? Worth paying for? Substance? Recommend?” and 2) to find out about an instructor ... Good? Experienced? Knowledgeable? Recommend?

Ultimately, the goal of the site is to provide accurate and helpful information to our members who are looking at taking any course by any instructor – regardless if it’s an AAR course or not.

The site is two years old and time for a make-over.

Some goals with the makeover will include:

- Updated graphics for an enhanced professional appearance
- Enhanced structure to make it easier to search for classes and instructors
- Consistency in the display of information
- Addition of class catalog information
- Possibility of utilizing a back-end database structure

Recommendations:

1. Proceed with revisions noted above?
2. Remove the secondary content of instructor development and keep the site focused on student resources.