

PROFESSIONAL & BUSINESS DEVELOPMENT COMMITTEE REPORT 2015 Business Plan
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FROM: Professional & Business Development Primary Committee (PBD)
Chair: Gary Nelson
Staff Liaison: Barb Freestone
DATE: February 2015

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

The following are programs, products, services and activities (PPSA's) with Professional & Business Development oversight.

CURRENT TOP PRIORITIES

- Certified Residential Property Management certification program rollout
- Spring Convention
- CFPB education course (in partnership with AMLA and ASEA)
- MRE Society application period
- MRE Society name change consideration

RECOMMENDATIONS

- None at this time

GROUPS FORMED

- GRI Oversight Workgroup – Chair Christopher Paris
- Broker University Workgroup – Chair Holly Eslinger
- 2016 Spring Convention Location Task Force – Yvette Palmer

Support & Resources

There 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 preminent educational programs.

Measurable objectives	Status
Resources and tools are available to develop, offer, or market programs and products within this business plan.	On-going
Appropriate groups are updated throughout the year.	On-going
A broad spectrum of delivery systems are utilized to deliver education to the members	Live classrooms, remote classrooms, webinars used to date. In process of developing Mack in a Minute – 1 minute videos featuring Rick Mack
Staff continually develops the needed knowledge	On-going

and skills to develop educational programs/products that are responsive to member needs and changes in the industry and technology tools	
Marketing collateral is developed and distributed to promote education programs and classes.	
AAR has a presence at local association and firm events to promote AAR's educational programs and resources.	
AAR works through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics.	
Assistance is available as needed to help appropriate groups or entities enhance prelicensing and postlicensing curriculum criteria.	No requests received to date. Barb Freestone serves on the ADRE Education Advisory Committee
AAR provides comprehensive, reliable, and accessible information to the REALTOR® member.	On-going Currently collaborating with AMLA and ASEA to develop a CFPB class with the goal of providing consistent correct information to members of the three organizations

Broker University

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

Measurable objectives	Status
Programs and services are developed and/or offered brokers/owners which focus on operating a successful brokerage and/or managing risk.	Annual Broker Seminar planned for June 5 BMC classes scheduled for August
Partnership opportunities are continually explored and evaluated that brings quality programs to our brokers when partnering is more advantageous than developing.	
Brokers are informed of AAR's programs, products and resources and their benefit utilizing a variety of vehicles and messages.	
Feedback is solicited and evaluated from each program.	
Brokers have access to broker-specific information, including a welcome new broker kit.	Welcome new DB eblasts rolled out in January
The feasibility of offering a Broker-to-Broker mentoring/hotline program is explored and developed if wanted.	Determined to start with monthly webinars geared for brokers

Demographics of Arizona brokers are evaluated and used to determine needs assessments for education content.	
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rCRMS (Certified Risk Management Specialist)

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.

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.	13 classes scheduled to date: <ul style="list-style-type: none"> • 4 remote (4-budgeted) • 9 live through local associations (8-budgeted)
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 value & benefit messages through marketing efforts that include email, social media, videos and print collateral.	
Newly certified members are recognized through appropriate AAR vehicles.	Announcement on AAR facebook page
Options to create online versions of the rCRMS program are explored and developed, if feasible.	

Education Outreach

This plan concentrates on delivering quality education directly and through partnership opportunities. This plan enables AAR to bring quality and affordable programs to local associations and their members.

AAR delivers or provides partnership opportunities with local associations, the brokerage communities and allied industries to deliver high-level, skill-based programs and resources led by instructors who are practitioners in the topics they teach.	14 classes scheduled to date: <ul style="list-style-type: none"> • 4 remote classes (6-budgeted) • 4 property management (4-budgeted) • 10 REBAC (10-budgeted)
A live remote broadcast system will be utilized to deliver certification/designation and c/e classes to members in partnership with local associations.	Electrical outlets added to south wall in classroom New microphones purchased
Educational programs offered address the needs of the members in helping them grow their business and prepare for changing trends in the industry.	Monthly webinar series Stats to date: Webinar topic: Attended Viewed Archives

	<table border="1"> <tr> <td>1/7/2015</td> <td>NAR REALTOR® Benefit Summit</td> <td></td> <td></td> </tr> <tr> <td></td> <td>REALTOR® FCU</td> <td>23</td> <td>9</td> </tr> <tr> <td></td> <td>TaxBot</td> <td>33</td> <td>1</td> </tr> <tr> <td></td> <td>REALTORS Prop Resource®</td> <td>32</td> <td>7</td> </tr> <tr> <td></td> <td>.REALTOR/MVP/Library</td> <td>26</td> <td>14</td> </tr> <tr> <td colspan="4">Top 5 Most Common GREEN Questions asked to</td> </tr> <tr> <td>1/20/2015</td> <td>REALTORS®</td> <td>36</td> <td>6</td> </tr> <tr> <td>1/28/2015</td> <td>HOA Addendum</td> <td>273</td> <td></td> </tr> <tr> <td>2/11/2015</td> <td>FLEXMLS</td> <td>66</td> <td>5</td> </tr> </table>	1/7/2015	NAR REALTOR® Benefit Summit				REALTOR® FCU	23	9		TaxBot	33	1		REALTORS Prop Resource®	32	7		.REALTOR/MVP/Library	26	14	Top 5 Most Common GREEN Questions asked to				1/20/2015	REALTORS®	36	6	1/28/2015	HOA Addendum	273		2/11/2015	FLEXMLS	66	5
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A forum for local education staff and ADRE (updates and Q&A on school process, policies, guidelines) is provided.	October, 2015																																				
Members are informed of educational opportunities through marketing efforts that include, web calendar, email, social media, videos and print collateral.																																					
Technology tools will be utilized to deliver nuggets of information to members during classes to increase the awareness of the value and benefits of the classes.																																					
Resources are available to local education staff and volunteers charged with overseeing or developing their education endeavors.	Education Chairman's manual developed and distributed to local associations December 2014																																				
Cross marketing strategies are utilized in education class promotions.																																					
Student feedback is solicited and evaluated after every class.																																					
Established instructor criteria are used as the basis for selecting and hiring instructors.																																					

Education Development

This plan provides for the development of education programs that address current issues and trends as well as developing online options for some of AAR's curriculum. Additionally, members have a vehicle to write reviews of instructors and courses.

An effective and efficient learning management system is utilized to develop and host AAR's online education.	Ongoing
AAR develops online educational classes utilizing technology(ies) that raise the bar in the effectiveness of online education in both content and delivery.	
Resources and training are available to ensure best practices are utilized in curriculum development.	
A library of AAR c/e courses is developed and maintained that address the needs of members.	Ongoing
A vehicle for members to review and comment on	www.REteach.us

instructors and courses is available and continually evaluated.	
Programs developed are responsive to the changing industry and needs of members.	Property Management Certification program in final stages of development. Anticipate rollout in early Spring
Members are aware of resources and tools to assist them in assessing their own skills and knowledge.	

Instructor Development

The skill-set of instructors is important in ensuring learning takes place. This plan focuses on enhancing the core competency level and skills of instructors involved in AAR's programs as well as Arizona real estate education in general.

Measurable objectives	Status
Instructors and education volunteers are aware of established instructor criteria and the Instructor Certification Program.	
Opportunities are available or provided to assist instructors in honing their skills.	IDW scheduled for February 27, 2015 – focusing on COE (16 registered to date)
Local associations are aware of the benefit to hiring ME certified instructors.	

Industry Partners Conference

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.

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

Leadership Training & Development

This plan consists of the annual conference that brings together AAR and local association leadership for thought-provoking discussion on leadership issues, association updates and opportunities to build an effective statewide leadership team. Additionally this plan provides for a comprehensive leadership development program.

Measurable objectives	Status

An annual conference is offered to prepare incoming leadership to fulfill their roles, celebrate the accomplishments of outgoing AAR president, install incoming leadership and network with peers.	
Feedback is solicited from incoming leadership to identify needs and evaluation of conference and training opportunities.	
Members are aware of opportunities to serve in leadership and committees within AAR.	
Resources are compiled and available to assist or develop future leaders.	
AAR delivers a leadership training program for ongoing development of future leadership.	LTA 2014-2015 – excellent feedback received. 21 students representing: Central Arizona, Green Valley, Lake Havasu, Northern Arizona, Phoenix, Prescott, Santa Cruz, Scottsdale, Sedona-Verde Valley, SEVRAR, Tucson, White Mountain and Yuma.

MRE Society

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

Measurable objectives	Status
A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments.	Application period open January 1- February 28, 2015 Applications received to date: New: 5 New Alumni: 10 New Gold: 9
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.	PBD Committee is discussing a name change for the society to avoid confusion with NAR's Master of Real Estate degree – currently seeking feedback from members of the MRE Society.
Re-energize the Smart Start video series to include topics from the Pathways to Professionalism.	

REALTOR Institute: GRI Designation

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.

Measurable objectives	Status
The GRI program is available to members throughout the state.	60 classes scheduled to date <ul style="list-style-type: none"> • <i>(includes 4 remote classes – 4-budgeted)</i> <i>4 new graduates in January</i>
Partnership opportunities are available to local associations and firms who wish to deliver the GRI courses to their members.	13 associations offering live GRI classes 10 associations offering classes via live remote feed 2 firms offering a class
Members are aware of the GRI program through marketing efforts that include email, social media, videos and printed collateral.	GRI Facebook page GRI Website E-blasts about the program
The program is evaluated annually for effectiveness, structure and format to ensure it offers unsurpassed curriculum and meets the needs of our members and is responsive to the changing industry.	Annual evaluation will be sent in August.
Student feedback is solicited after each class with enhancements made when appropriate.	Ongoing review of course evaluations and feedback from students.
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 One new instructor approved in January
Marketing collateral focuses on benefits to building a successful career and includes video and commercials.	
Brokers are informed of the value of the program brings to their agents' business success.	Broker email regarding the GRI program is schedule to be sent on February 23rd
Resources are available to provider-partners to help deliver and promote the courses.	Promotional and marketing material is available on the GRI website. New in spring of 2015: Instructor class invitation videos.
New designees are recognized where appropriate and provided resources to help them promote their accomplishment.	New designees are announced on GRI Facebook group as well as the GRI webpage. List of new designees also sent to local association AE's and presidents

Proactive efforts are made to develop additional online courses to earn the GRI designation.	
A financial scholarship program is available to members and evaluated annually.	48 scholarships were awarded for the 1 st Quarter of 2015 for students in classes provided by: Lake Havasu Phoenix WeMAR Prescott Scottsdale Tucson 2nd quarter application period will open on March 9th.
National trends in the GRI programs are monitored to keep AAR's GRI program growing and evolving.	On-going
Student demographics are identified, compiled and continually evaluated.	Demographics are collected through each GRI course evaluation completed by students.

Spring 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 addresses the trends and 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.	
Continually explore and evaluate areas/locations for future spring conventions.	Task Force, chaired by Yvette Palmer, researching Tucson area for 2016 Convention – a recommendation will be submitted to PBD Committee in April.