

<b>PROFESSIONAL &amp; BUSINESS DEVELOPMENT COMMITTEE REPORT</b> <b>2015 Business Plan</b>
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**FROM: Professional & Business Development Primary Committee (PBD)**  
**Chair:** Gary Nelson Vice Chair: Christopher Paris  
**Staff Liaison:** Barb Freestone  
**DATE: May 11, 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
- Industry Partners Conference (September 16)
- CFPB education course (in partnership with AMLA and ASEA)

**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
- Property Management Certification – Sue Flucke
- AAR Learning Environment – Evan Fuchs

**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 preeminent educational programs.

<b>Measurable objectives</b>	<b>Status</b>
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 and skills to develop educational programs/products that are responsive to member needs and changes in the industry and technology tools	On-going
Marketing collateral is developed and distributed to promote education programs and classes.	Flyers are prepared for local association course providers, flyers are taken to events. Stand-up promo banners in inventory: GRI, rCRMS
AAR has a presence at local association and firm events to promote AAR's educational programs and resources	Participated in Coldwell Banker event in March and in June
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	Ongoing In collaboration with AMLA and ASEA, developed a CFPB – The New Closing Process 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.

<b>Measurable objectives</b>	<b>Status</b>
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Programs and services are developed and/or offered to brokers/owners which focus on operating a successful brokerage and/or managing risk.	Annual Broker Seminar scheduled for June 5 (Real Estate through the Legal Lens) BMC classes held at Spring Convention (52 BMC1/57 BMC3) scheduled for August
Partnership opportunities are continually explored and evaluated that bring 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,	e-blasts: GRI and rCRMS program
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 Offered BMC sessions at Spring Convention Scheduled BMC sessions in August Broker-specific Webinars Broker Summit – June 5
The feasibility of offering a Broker-to-Broker mentoring/hotline program is explored and developed if wanted	Determined best to start with monthly webinars geared for brokers May 21: How to Run Efficient Office Meetings with Holly Eslinger

### **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.

<b>Measurable objectives</b>	<b>Status</b>
The risk management certification program (rCRMS) focuses on state specific issues and is offered and available to members throughout the state where feasible.	Budgeted: 4 – remote/8 live 18 classes scheduled to date: <ul style="list-style-type: none"> <li>• 4 remote</li> <li>• 14 live through local associations</li> </ul>

	<i>rCRMS Fed Legal Issues – Jan 30, 2015 (44 Attended)</i> <i>rCRMS Claims &amp; Remedies – Feb 18, 2015 (23 Attended; 13 Attended Remotely)</i> <i>rCRMS Ess Skills – Feb 27, 2015 (23 Attended)</i> <i>rCRMS Agency – March 18, 2015 (15 Attended; 3 Attended Remotely)</i> <i>rCRMS Agency – April 22, 2015 (14 attended)</i> <i>rCRMS Mastering the Res Contract – April 30-May 1 (16 attended)</i>
A cadre of qualified instructors to deliver the rCRMS courses is maintained and monitored.	On-going
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	Redesign of brochure targeted for November-December
Newly certified members are recognized through appropriate AAR vehicles.	Announcement posted 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.

<p>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</p>	<p>Budgeted: 4-remote/10 live 26 classes scheduled to date:</p> <ul style="list-style-type: none"> <li>• 6 remote classes</li> <li>• 4 property management</li> <li>• 16 REBAC</li> </ul> <p><u>AAR</u></p> <ul style="list-style-type: none"> <li>• Marketing Reboot – Jan 14, 2015 (Cancelled)</li> <li>• GREEN 100 – Feb 5, 2015 (20 Attended; 8 Attended Remotely)</li> <li>• GREEN 200 – Feb 12, 2015 (20 Attended; 8 Attended Remotely)</li> <li>• GREEN 300 – Feb 19, 2015 (20 Attended; 8 Attended Remotely)</li> <li>• Market Reboot – Feb 25, 2015 (Rescheduled for April - cancelled)</li> </ul> <p><u>SCOTTSDALE</u></p> <ul style="list-style-type: none"> <li>• SRS – Jan 15/16, 2015 (22 Attended)</li> <li>• RSPS – Feb 12, 2015 (25 Attended)</li> <li>• Marketing Reboot – cancelled</li> <li>• SRES – Mar 19-20 (28 attended)</li> <li>• ePRO – May</li> <li>•</li> </ul> <p><u>BULLHEAD CITY</u> SRES – Feb 26-27, 2015 (14 Attended)</p> <p><u>SEVRAR</u> SRS – April 27 (cancelled) SRES – May 7-8</p>
<p>A live remote broadcast system will be utilized to deliver certification/designation and c/e classes to members in partnership with local associations</p>	<p>Minor enhances to classroom made in January (electrical outlets on the south wall)</p> <p>Continuing to finetune microphone in host location</p>
<p>Educational programs offered address the needs of the members in helping them grow their business and prepare for changing trends in the industry.</p>	<p>Monthly webinar series Stats as of May 4:</p>

Webinar Date	Webinar Name	Guest Presenter	Registered Attendees	Actual Attendees	Attendance Rate	Avg Interest	Avg Attentiveness	Clicked the Registration Link	YT Views as of 5/4/2015
1	1/7/2015 NAR REALTOR® Benefit Summit		65		80%	55.79	80.11	532	
	REALTOR® FCU	Regina Tuttle	38	23					10
	TaxBot	Jake Randall	51	33					8
	REALTORS Prop Resource®	Laura Gans	52	32					12
	REALTOR/INFP/Library	Ron LaBee	47	26					21
	Top 3 Most Common GREEN Questions asked to								
2	3/20/2015 REALTORS®	Melissa Camp	76	36	47.37%	51.58	83.11	408	7
3	1/26/2015 NGA Attendance	Holly Mabery	424	270	64.79	45.89	66.38	734	225
4	2/11/2015 FLEXMLS	Barb Hoffman	123	66	53.25	42.89	85.03	447	41
5	3/11/2015 Fair Housing & Prop Mgmt	Denise Holliday	108	56	51.85	48.3	60.57	825	7
6	4/8/2015 Better Photos	Beth Adams	81	33	40.74	42.24	63.91	292 Not published	
7	4/21/2015 NCR Assist Webinar	Bill Rouser	25	17	68	52.81	94.25	59 Not published	

  

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	Courses are posted on web calendar, monthly e-blasts, facebook calendar and postings, reminder tweets, flyers
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.	Re-evaluating effectiveness of tweeting during 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.	On-going (e-blasts containing upcoming classes
Student feedback is solicited and evaluated after every class.	Monitored after each class
Established instructor criteria is used as the basis for selecting and hiring instructors.	On-going

## 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.	On-going
AAR develops online educational classes utilizing technology(ies) that raise the bar in the effectiveness of online education in both content and delivery	Micro-learning segments offered via webinars
Resources and training are available to ensure best practices are utilized in curriculum development	Instructor Development Workshop held in February (31 attended)
A library of AAR c/e courses is developed and maintained that address the needs of members.	On-going
A vehicle for members to review and comment on instructors and courses is available and continually evaluated.	<a href="http://www.RETeach.us">www.RETeach.us</a> (to date, 10 new reviews posted in 2015) In total - 280+ reviews posted
Programs developed are responsive to the changing industry and needs of members.	CFPB- the New Closing Process class developed in collaboration with AMLA and ASEA  Property Management Certification in final stages of development. Rollout anticipated in late Spring
Members are aware of resources and tools to assist them in assessing their own skills and knowledge	NAR in process of re-tooling their Assessment Program

### 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.

<b>Measurable objectives</b>	<b>Status</b>
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 held February, 2015 – focusing on COE & Commissioners Rules

	31 attended  Train the Trainer offered April 8 for AAR's new CFPB course (20 attended) Train the Trainer for AAR's New CFPB course scheduled for May 29
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.	September 16, 2016 Fletcher Wilcox, Chair AAR reps: Bill Ashker, Duane Fouts, Mary Frances Coleman Location: Chaparral Suites Focus: CFPB Closing Process
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.	October 8-9, Scottsdale Area Association of REALTORS facility
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 on-going development of future leadership.	<p>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.</p> <p>Dates have been identified for 2015-2016 LTA session (AE's and AAR line officers/RVP's notified of dates)</p>

**MRE Society**

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

<b>Measurable objectives</b>	<b>Status</b>
A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments.	2015-2016 Term: New: 8 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 approved name change effective January 1, 2016: MRES (Master Real Estate 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.

<b>Measurable objectives</b>	<b>Status</b>
The GRI program is available to members throughout the state.	60 live classes scheduled to date <i>Remote delivery option offered</i> <i>(Budgeted: 4 remote classes – 4 scheduled)</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 Group 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 instructor applicant taught a fast track class on 1/28/2015
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 sent on February 23rd and also scheduled for June 1st
Resources are available to provider-partners to help deliver and promote the courses.	Promotional and marketing material is available on the GRI website.  GRI Website conversion to Wordpress platform - complete  New in spring of 2015: Instructor class invitation videos.

<p>New designees are recognized where appropriate and provided resources to help them promote their accomplishment.</p>	<p>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</p>
<p>Proactive efforts are made to develop additional online courses to earn the GRI designation.</p>	
<p>A financial scholarship program is available to members and evaluated annually</p>	<p>48 scholarships were awarded for the 1<sup>st</sup> Quarter of 2015 for students in classes provided by: Lake Havasu Phoenix WeMAR Prescott Scottsdale Tucson</p> <p>57 scholarships were awarded for the 2nd quarter of 2015 for students in classes provided by: AAR SEVRAR Lake Havasu Phoenix WeMAR Northern AZ Scottsdale Tucson</p>
<p>National trends in the GRI programs are monitored to keep AAR's GRI program growing and evolving.</p>	<p>On-going</p>
<p>Student demographics are identified, compiled and continually evaluated</p>	<p>Demographics are collected through each GRI course evaluation completed by students.</p>

**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.

<b>Measurable objectives</b>	<b>Status</b>
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	430 attended 16 vendors 9 c/e classes 16 breakout session options Ambassador program – new in 2015 (promotional activities and on-site greeters)
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 location – a recommendation presented to delay consideration until 2017 for 2018 (PBD approved)

**Program, Product, Service or Activity (PPSA):**

***Education Development***