

**PROFESSIONAL & BUSINESS DEVELOPMENT COMMITTEE REPORT**  
**2015 Business Plan**

**FROM:** Professional & Business Development Primary Committee (PBD)  
**Chair:** Gary Nelson Vice Chair: Christopher Paris  
**Staff Liaison:** Barb Freestone  
**DATE:** September 9, 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)
- Trends Summit – November 2

**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

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

**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      |

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| 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 discussion stage with Rick Mack to develop Mack in a Minute – 1 minute legal/risk 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, June and September<br>PBD Table at SEVRAR expo in September   |
| 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<br>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. |

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

**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>  |
|---|--|
| 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 held June 5 (Real Estate through the Legal Lens)<br>BMC classes held at Spring Convention and August (via remote delivery)   |
| 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   |
| The feasibility of offering a Broker-to-Broker mentoring/hotline program is explored and developed if wanted  | <p>Determined to start with monthly webinars geared for brokers:</p> <p>May 21: How to Run Efficient Office Meetings with Holly Eslinger</p> <p>June 18: Recruiting Agents, KC Cyga</p> <p>July 16: Policies &amp; Procedures, Holly Eslinger</p> <p>August 20: Trust Accounting, Mike Mumford</p> <p>September 24: Managing &amp; Accountability of Real Estate Teams, Holly Eslinger</p> <p>October 15: Unlicensed Activity &amp; Assistants</p> <p>November 19:</p> |

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|  | <p>E&amp;O, General Liability &amp; Cyber Security, Lisa Robinson</p> <p>December 17: In-House Mentoring</p> |
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**Program, Product, Service or Activity (PPSA):**

**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>   |
|--|---|
| <p>The risk management certification program (rCRMS) focuses on state specific issues and is offered and available to members throughout the state where feasible.</p> | <p>Budgeted: 4 – remote/8 live<br/>18 classes scheduled to date:</p> <ul style="list-style-type: none"> <li>• 4 remote</li> <li>• 14 live through local associations</li> </ul> <p><i>rCRMS Fed Legal Issues – Jan 30, 2015 (44 Attended)</i><br/> <i>rCRMS Claims &amp; Remedies – Feb 18, 2015 (23 Attended; 13 Attended Remotely)</i><br/> <i>rCRMS Ess Skills – Feb 27, 2015 (23 Attended)</i><br/> <i>rCRMS Agency – March 18, 2015 (15 Attended; 3 Attended Remotely)</i><br/> <i>rCRMS Agency – April 22, 2015 (14 attended)</i><br/> <i>rCRMS Mastering the Res Contract – April 30-May 1 (15 attended)</i><br/> <i>May 19: Federal Issues (26 attended)</i><br/> <i>June 9: Essential Skills for Successful Closing (17 attended)</i><br/> <i>June 18: Mastering Commercial Contract (23 attended)</i></p> |

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|  | <i>June 26: Claims and Remedies (19 attended)</i><br><i>July 17: Federal Legal Issues (28 attended)</i><br><i>August 17-18: Mastering the Residential Contract (19 registered)</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   | Audio recording target classes in preparation for online conversion  |

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

**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

Budgeted: 4-remote/10 live  
26 classes scheduled to date:

- 6 remote classes
- 4 property management
- 16 REBAC

#### AAR

- GREEN 100 – Feb 5, 2015  
(19 Attended; 8 Attended Remotely)
- GREEN 200 – Feb 12, 2015  
(19 Attended; 8 Attended Remotely)
- GREEN 300 – Feb 19, 2015  
(19 Attended; 8 Attended Remotely)
- CFPB: The new closing process (20 attended – offered only remotely)

#### SCOTTSDALE

- SRS – Jan 15/16, 2015 (21 Attended)
- RSPS – Feb 12, 2015 (25 Attended)
- SRES – Mar 19-20 (28 attended)
- ePRO – May 19 (27 attended)
- GenBuy – August 21
- PM Bootcamp – September 25
- ABR – December 9-10

#### BULLHEAD CITY

SRES – Feb 26-27, 2015 (14 Attended)

#### SEVRAR

SRES – May 7-8 (26 attended)  
ABR – November 5-6

#### NORTHERN ARIZONA

CFPB – June 5 (16 attended)

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|  | <p><u>PRESCOTT</u><br/> <i>CFPB – June 11 (30 attended am/24 attended pm)</i><br/> <i>CFPB – September 10</i><br/> <i>SRES – September 24-25</i><br/> <i>ABR – October 22-23</i></p> <p><u>PHOENIX</u><br/> <i>PM Bootcamp – July 8 (60 attended)</i></p> <p><u>TUCSON</u><br/> <i>PM Bootcamp – August 13 (57 attended)</i></p> <p><b>NARPM – Southern Chapter</b><br/> <i>Anatomy of Property Management Agreement – August 19</i></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>Fieldtested option to have no students in the live location and to have only 8 students in the live class. In the process of evaluating both in terms of learning experience for remote students</p>  |
| <p>Educational programs offered that address the needs of the members in helping them grow their business and prepare for changing trends in the industry.</p> | <p>Trends Summit scheduled for November 2 (Lawrence Yun, Jonathon Smoke and Elliot Eisenberg)</p> <p>Monthly webinar series</p> <p>Stats as of May 4:</p>  |
| <p>A forum for local education staff and ADRE (updates and Q&amp;A on school process, policies, guidelines) is provided.</p>                                   | <p>Scheduled for September 21 (10:30 – 1:30)</p>   |

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| 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. Update planned for the fall. |
| 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  |

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

**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.

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| 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   | Train the Trainer offered in April and May for instructors to teach AAR's CFPB class  |
| 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)<br>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  |



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|   | collaboration with AMLA and ASEA<br><br>Property Management Certification rolled out in August |
| 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  |

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

**Instructor Development**

| <b>Measurable objectives</b>   | <b>Status</b>   |
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| Instructors and education volunteers are aware of established instructor criteria and the Instructor Certification Program | Ongoing   |
| Opportunities are available or provided to assist instructors in honing their skills                                       | IDW held February, 2015 – focusing on COE & Commissioners Rules<br>31 attended<br><br>Partnered with Course Creators to offer an IDW on August 26 (16 attended) |
| Local associations are aware of the benefit to hiring ME certified instructors   |   |

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

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.

| <b>Measurable objectives</b>  | <b>Status</b>  |
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| An educational program, through partnership program with AMLA and ASEA, | September 16, 2015<br>Chaparral Suites<br>352 registered as of 8/10/2015 |

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| 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. |  |

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

**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.

| <b>Measurable objectives</b>   | <b>Status</b>  |
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| 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 at the new Scottsdale Area Association facility<br>PMN Leadership Excellence<br>scheduled for October 7  |
| 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.  | LTA Program. 2014-2015 Program completed in February. Extremely positive feedback received.<br><i>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.</i><br><br>Dates for 2015-2016 Program:<br>Module 1: October 26-27 2015<br>Module 2: December 2-3, 2015 |

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|  | 2016:<br>Module 3: January 20-21, 2016<br>Module 4: February 24-25, 2016 |
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**Program, Product, Service or Activity (PPSA):**

**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>  |
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| A tool is available and used to recognize members lifelong learning commitment through their educational accomplishments   | Application period January 1-February 28, 2015<br>11 Gold Members<br>13 Alumni Members<br>8 New Member (20 budgeted) |
| 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  |  |

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

**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.   | <i>Budgeted: 4 remote classes – 4-budgeted)</i><br>60 classes scheduled to date |
| 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                                       |

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|   | 10 associations offering classes via live remote feed<br>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<br>GRI Website<br>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<br>21 instructors<br>One instructor teaching 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 is schedule to be sent on February 23rd and again 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.<br><br>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.<br>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 <sup>st</sup> Quarter of 2015 for students in classes provided by:<br>Lake Havasu<br>Phoenix                       |

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|   | <p>WeMAR<br/>Prescott<br/>Scottsdale<br/>Tucson</p> <p>57 scholarships were awarded for the 2nd quarter of 2015 for students in classes provided by:<br/>AAR<br/>SEVRAR<br/>Lake Havasu<br/>Phoenix<br/>WeMAR<br/>Northern AZ<br/>Scottsdale<br/>Tucson</p> <p>66 scholarships were awarded for the 3rd quarter of 2015 for students in classes provided by:<br/>AAR<br/>SEVRAR<br/>Phoenix<br/>WeMAR<br/>Northern AZ<br/>Scottsdale<br/>Tucson<br/>West USA</p> |
| 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.   |

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

**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 |
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| <p>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</p> | <p>430 attended<br/> 16 vendors<br/> 9 c/e classes<br/> 16 breakout session options<br/> Ambassador program – new in 2015 (promotional activities and on-site greeters)</p>              |
| <p>Cutting-edge and emerging technologies are incorporated into the program and marketing efforts where possible.</p>  |  |
| <p>Positive feedback is received.</p>  |  |
| <p>Continually explore and evaluate areas/locations for future spring conventions</p>  | <p>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)</p> |