2017 PBD Measureable Objective Update

From: **Professional and Business Development (PBD) Committee**
Chair: **Pam Frestedt**
Staff Liaison: **Barb Freestone**
Date: **9/13/2017**

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

Current Top Priorities

- Leadership Conference
- GRI designees/MRES Society Webinar series
- Broker Visits
- Trends Summit – begin to plan

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Chair Susan Slattery
- Broker University Workgroup – Chair KC Cyga
- CRPM Advisory Workgroup – Sue Flucke
- AAR Learning Environment digital badge Task Force– Evan Fuchs
- Education Materials Task Force – Emmy Simpson
- Online Education Task Force – Sindy Ready
- 2017 Convention Planning – Mandy Neat
- Education Ambassador Feasibility Task Force – Keri Means

Broker University

This program involves:

- *Annual Broker Seminar*
- *Broker Management Clinic classes*
- *MyBrokerCoach blended online program for new brokers*
- *Broker Outreach efforts*
- *Webinar series*

Measurable objectives	Status

Offer annual summit targeted to brokers issues and needs	PBD approved request from Broker University Workgroup to not offer annual Broker Summit this year
Evaluate opportunities for programs that focus on running a business and if deemed advantageous and appropriate, partner	Offered, in partnership with Florida Association, their Broker Profitability Webinar 7 week program series on: June 19, 26, July 10, 17, 24, 31, August 7. 10:00 – Noon EST 12 Arizona attendees
Distribute a promotional video trailer to brokers which highlight the educational opportunities available for their agents	rCRMS promotional video completed – GRI video alsmost completed
Offer quarterly e-blasts to brokers which highlight the educational opportunities available for their agents	2nd Quarter GRI eblast to brokers: Sent 3/2/17 2519 sent 752 opened (20.96% open rate) 61 click thru (.56%)
Student feedback is favorable regarding quality and relevance	On-going
Present, at a minimum, two rounds of Broker Management Clinic classes (one at Spring Convention and one through remote live streaming) with target attendance of 25	BMC1 (46 students) and BMC2 (49 students) held during convention Live Streaming BMC dates: September 25-26
Workgroup will review firm demographics to target content and educational efforts	Done
Review and enhance Broker University webpage: • Update/redesign MyBrokerCoach to streamline and explore alternate delivery methods • Identify and post resources focusing on business operations	Digital conversion for MyBrokerCoach completed and posted on AARonline.com in July.
Offer quarterly topical webinars	Broker Brief Webinar s held in March,, June and September Upcoming Webinar scheduled for December 13
Outreach efforts to a minimum of 10 brokers	In process
Survey brokers to identify their education/skill needs are – specifically needs within each brokerage size	Timeframe: October

rCRMS (Certified Risk Management Specialist)

This program involves:

- rCRMS Program development, administration, delivery and marketing

Measurable objectives	Status
Offer the rCRMS to members in partnership with local associations/firms based on need, but at a minimum: • Two classes through live streaming (spring and early fall) with target attendance at 20 • Ten classes live in partnership with target attendance at 25	Location association partners to date: Phoenix SEVRAR Scottsdale WeMAR Tucson Northern Arizona 14 live classes scheduled to date 2 live streaming classes scheduled (May/November) Attendance at January class: Federal Legal Issues with WeMAR: 54 students Attendance at March class: Federal Legal Issues at SEVRAR: 31 students Attendance at April classes: Essential Skills at NAAR: 28 students Essential Skills at Scottsdale: 39 students Attendance at May classes: Claims & Remedies at Scottsdale: 22 students Disclosure & Due Diligence (REMOTE): 49 students in all Federal Legal Issues at Phoenix: 39 students Attendance at June classes: Essential Skills at SEVRAR: 62 students Attendance at July classes: Federal Legal Issues at NAAR: 36 students
Monitor and update where needed course curriculum • Two-day contract module revised to one-day module, if deemed possible	Two-day contract content under review

• Advertising & Misrepresentation course revamped to address current issues/trends/practices	
Maintain and monitor a cadre of qualified instructors	One new instructor added to the cadre: Jesi Wolnik
Flyer templates are provided for local association partner classes	-on going
Dedicated instructor page houses course materials	
Offer courses at affordable registration fee including a discount rate for rCRMS certification holders	Done: 6 hour reg fee: $59 /$34 rCRMS Discount 12 hour reg fee: $79 / $54 rCRMS Discount
Promotional activities will consist of: • Two annual eblasts educating members about the value of the program • Printed brochure • Dedicated webpage with general information • Course offerings included on AAR web calendar and monthly calendar e-blasts • Instructor video invitations	New brochure completed – combined with CRPM and GRI into one brochure housing all 3 programs.
A minimum of two facebook ads published	Target: April, September
Maintain a list of certified members with newly certified members recognized on CRMS webpage, AAR facebook page and announced to local associations	Ongoing To date, there are 186 members who have earned the rCRMS certification (154 are currently active members) 3 of those earned the certification to date in 2017)

Education Outreach

This program involves:

1. Delivery and administration of NAR designation/certification classes through local association partnership and remote delivery (development, administration, marketing, license fees)
2. Delivery of 3 hour c/e courses at low cost to local association partnerships
3. Reference and resources supporting education endeavors
4. Annual Arizona Education Director Workshop
5. Annual Trends Summit

Measurable objectives	Status
Select instructors based on established criteria that focuses on practitioner experience and leading edge delivery skills	Done and on-going

Partnership program is available to bring REBAC and AAR classes to local associations, ISC chapters and brokerages who request them	Done Northern Arizona: ABR and PSA class Prescott Area: SRS class
Utilize the knowledge and experience of Instructors to create workshop and engagement activities for courses offered	
Offer a minimum of 4 live REBAC classes and 2 remote live-streamed with a target attendance of 25	2 live streamed classes scheduled 3 live REBAC classes in partnership with local associations requested 2/23-24/17 SRS – Prescott: 23 attended 4/27-28/17 ABR – Northern Arizona 6/6-7/17 Pricing Strategies – Northern AZ: Cancelled 8/25/17 MRP (REMOTE): 33 Attended (BHC, LHC, Sedona, WMtn and Yuma)
Flyer templates are provided to partners for their classes	Done
Offer one day of c/e classes with local associations each month through live streaming with target attendance of 50	Local Association classroom partners: Kingman, Lake Havasu, Bullhead City, Sedona, Prescott, White Mountain, Yuma, Western Pinal, SEAZ Attendance at January Live Streaming c/e class: 71 Attendance at February live streaming c/e class: 62 Attendance at March live streaming c/e class: 66 Attendance at April live streaming c/e class: 42 Attendance at May live streaming c/e class: 39 Attendance at June live streaming c/e class: 85 Attendance at July live streaming c/e class: 73 Attendance at August live streaming c/e class: 59
Guidelines are established and followed with priority placed on the learning experience of the students in live and remote live-streaming classes offered in partnership through AAR	Administrative guidelines updated

Registration fees for REBAC and c/e classes will be competitive and affordable	Done Reg fee for 1-day REBAC classes: $59 Reg fee for 2-day REBAC classes: $159 Reg fee for c/e remote classes: $20
Offer an annual forum to provide resources, updates and sharing opportunities for local education staff.	Target: September
Provide an Education Chairman's manual and Remote Live Streaming Administrative Guide to local associations	Remote Live Streaming Admin Guide – complete Education Chair manual – in process
Offer an Annual Trends Summit featuring local and national speakers prepare members for changing trends in the industry.	Target: December
Explore and implement, if feasible, an education ambassador program • Define Outcome Objectives • Identify selection criteria for ambassadors • Develop job description/expectations • Provide ambassador training	Task Force identified. In process.

Education Development

This program involves:

- *Resources, reference material and training expenses to stay abreast of education trends and technologies*
- *Course development*
- *Development of Course-in-a-Box*
- *Development for video series featuring Legal Hotline Q&A*

Measurable objectives	Status
Utilize an effective and efficient learning managemen system to develop and host AAR's online education.	NAR's online platform vendor is hosting the online GRI course Task force currently reviewing vendor proposal for partnership with online c/e classes.
Develop and offer a Course-in-a-Box program for the new AAR Contract(s) that can be used by Arizona instructors who attend a training session	Done - Offered in December 2016
Provide resources to enable staff to monitor curriculum development and training trends for implementation in PBD programs	On-going
Utilize subject matter experts to enhance or develop AAR's library of c/e courses.	On-going
Provide the necessary curriculum development resources to develop quality programs	On-going

A minimum of 10 videos produced using select legal hotline Q&As	"Mack In A Minute" series (videos are distributed using the distribution list for AAR's BMQ (approximately 2400+) and housed in the Broker Program section under Increase Knowledge **September:** Wire Fraud **August:** Medical Marijuana and Property Management (23 views) **July:** Copyright Claims (86 views) **June:** RESPA (318 views) **May**: (BINSR): Overview of 2017 Changes to the BINSR (423 views) **April:** Seller Concessions: Explanation of the seller concessions and loan cost sections (488 views) **March:** ARMLS: Overview of updates in the ARMLS listing agreement (392 views) **February**: New AAR Purchase Contract: 3 Take-aways (673 views) **January:** Risk Reduction: 3 Tips to Keep You Out of Jail (381 views) **December**: Getting Paid: Three Items Needed **November**: ADRE Hot Topics:
Appoint a task force to explore the development of a digital member business tool-box	Risk Management area developed Team Tool Box – housed on AARonline.com

Instructor Development

This program involves:

- *Instructor Development Workshop*
- *Attendance at training conference workshops*
- *Quarterly webinars for instructors (subject matter updates)*
- *Resources (training/subscriptions) to share, incorporate and monitor presentation trends*

Measurable objectives	Status
Offer an annual Instructor Development Workshop focusing on skills.	IDW scheduled for September 27
Provide resources and guidance to new instructors coming into AAR cadre	On-going In process of getting Mandy Neat approved for REBAC classes
Offer an annual Instructor Training workshop for AAR instructors on how to effectively teach through remote live streaming classes	Scheduled for September 27

Develop teaching tip/best practice webinar snippits for GRI and rCRMS courses	Target: March, July, September, December Teaching Tip webinar recording completed in February for GRI Market Essentials class
Explore feasibility of creating instructor networking vehicle for instructors to share among themselves best practices in delivery and technology in teaching.	
Monitor. enhance and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	On-going

Industry Partners Conference

This program involves:

- Partnership role in planning, presenting and administering the annual Partners Conference

Measurable objectives	Status
Offer an annual Industry Partners Conference in partnership with AMLA and ASEA, to help members understand each other's role in the real estate transaction.	September 21, 2017 Embassy Suites PV Sold out as of September 8 – 300+
Positive feedback is received to ensure it meets the needs of our members.	

Leadership Training & Development

This program involves:

- Annual Leadership Conference
- LTA program
- Stand-Alone Leadership Workshop

Measurable objectives	Status
Offer an annual conference to incoming leadership and members who wish to become leaders, celebrate the accomplishments of outgoing AAR president, install incoming leadership and network with peers	Leadership Conference October 11-13, 2017 at Embassy Suites, Paradise Valley
Feedback is favorable regarding quality and relevance	Feedback from Season 3 LTA program extremely positive.

Provide information regarding NAR's leadership program to interested members.	Information posted on the LTA facebook group regarding the upcoming NAR leadership program
Deliver the LTA program for AAR leadership and incoming local association presidents-elect	Season 3 completed. Presidents-elect from the following associations attended Season 3: Bullhead City Central Arizona Lake Havasu Northern Arizona Prescott Scottsdale SEVRAR Tucson White Mountain Yuma Surveys sent to attendees from Session 1 and 2 to measure implementation
Develop and offer a stand-alone leadership workshop for members interested in getting involved or honing their leadership skills	Deferred to 2018 Discussion with WCR to partner on PMN Leadership Excellence (Sindy Ready-speaker) day before the AAR Leadership Conference Rolled out webinar series: The Art of Leadership. LTA attendees were invited to participate (15 participants)

MRES Society

This program involves:

- Administration and marketing of MRES program
- Career Path / New agent training/resources
- Communication efforts emphasizing value of education/learning
- Master in Minute Video series

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

Measurable objectives	**Status**

Offer a program to recognize members' lifelong learning commitment in their educational accomplishments	MRES Society membership – application period closed 18 new members 13 renewing members 10 gold members 83 society members for 2017-2018 term
Develop or partner to provide career path guide and/or education programs/resources to assist new agent or members looking to take their career to the next level.	Working with Brent Lancaster to develop blended online new agent training. Target completion - November
Emphasize value of education/lifelong learning to members through a minimum of 2 email communications to new members and 1 video	April and October
Utilize videos featuring members discussing the impact education courses had on their business success. (minimum of 4)	Phase 1: question was added to the MRES Society member survey in August Phase 2: those that answered the question will be sent an invite to record a video for us
Conduct annual survey to MRES members to evaluate membership value	Completed - August
Develop Master in a Minute videos using topics from NAR's Pathways to Professionalism and NAR Commitment to Excellence	Will begin development shortly of short videos about each section of the Purchase Contract.

Property Management Certification

This program involves:

- Administration, delivery and marketing of CRPM certification program
- Webinar series

Measurable objectives	Status
Offer the CRPM program to members at competitive cost throughout the state through remote delivery and partnership opportunities • A minimum of 8 classes are offered through remote live delivery with attendance goal of 40 • A minimum of 10 classes are offered live through partnership	10 live classes scheduled with local associations to date 8 live streaming classes scheduled to date 59 have earned the certification to date Attendance at January classes: 1/26/17 - live Agency class with NARPM: 58 attendees 1/23/17 - Live PM Bootcamp with SAAR: 38 attendees Attendance at February classes:

	2/10 CRPM Live streamed c/e classes: 42 (BHC, LH, Sedona, White Mountain, Yuma) Attendance at March classes: 3/17/17 – Live PMBC at SEVRAR – 32 attended Attendance at April classes: 4/13/17 – Live Advanced PMBC at WeMAR – 46 attended 4/25/17 – Live Anatomy of the PM Agreement at NARPM West Valley – 36 attended 4/27/17 – Live Legal Hotline Issues with NARPM Phoenix Metro – 70 attended Attendance at May classes: 5/12/17 – CRPM Live streamed c/e classes: 97 attended (BHC, LHC, Prescott, Sedona, Tucson, W Pinal, W Mtn., Yuma) Attendance at June classes: 6/12/17 – Live Adv. PMBC with Scottsdale – 74 attended 6/22/17 – Live PMBC with Phoenix – 22 attended 6/27/17 – Live PM NAR COE with Tucson – 26 attended Attendance at July classes: 7/7/17 - Live Name That Form / FH Get A Clue with LHC – 21 attended 7/12/17 – Live Adv. PMBC with Phoenix – Cancelled 7/19/17 – Live PM NAR COE with Scottsdale - 65 Attended Attendance at August classes: 8/11/2017 – CRPM Live streamed c/e classes: 71 attended (Kingman, LHC, Prescott, Sedona, WPinal, WMtn, Yuma)
Flyer templates are available to partners for courses offered in their areas	Done – ongoing

Utilize qualified instructors who meet the AAR established standards	Done
Student feedback is favorable regarding quality and relevance	Ongoing – to date, favorable feedback received
Offer Webinar series– minimum of quarterly or as needed	March, June, September, December
Printed brochure is available featuring certification requirements and value	CRPM content is included in the new education brochure along with GRI and rCRMS content.
Publish a minimum of 2 Facebook ads	January, September
Announce and maintain a master list of certification holders and newly certified members are recognized	Monthly graduate list is sent to the local education directors each month and posted on the AAR Facebook page.

REALTOR® Institute: GRI Designation

This program involves:

- Program administration and maintenance
- Curriculum maintenance and enhancements
- Special Designee course
- Dedicated website enhancements and maintenance
- Marketing
- Scholarship program

Measurable objectives	Status
The GRI program is available to members throughout the state.	On-going through local association partnerships and the Live Stream program. Stats thru August: 78 new designees 1320 students 195 first time students
Partnerships are utilized to deliver the live GRI classes	10 local associations and 1 firm (WestUSA) have scheduled GRI classes in 2017. 64 classes have been scheduled in 2017.
Flyer templates are provided to course providers and partners for courses held in their association	Flyer templates are housed on the GRI website. Template revision was made and new templates will be used in 2018
Offer a course featuring a national instructor to GRI Designees and MRES members which is also live	Annual GRI/MRES class was held

streamed to associations outside of the Phoenix metro area.	in a webinar format featuring 5 national speakers on 8/8 and 8/10.
Offer a minimum of three remote live-streamed GRI classes with a target attendance of 20	2/24/2017 GRI Agency – 28 Attended (Central AZ, Kingman, LHC, Sedona, WMtn, BHC) 6/13/2017: GRI Financing - 38 Attended (Bullhead, Central AZ, Kingman, LHC, Sedona, WMtn, Yuma 9/12/2017: GRI Market Essentials – 38 attended (Bullhead, Central Az, Lake Havasu, Sedona, White Mountain and Yuma)
Promote the value of the GRI program through: • Monthly eblast calendar notices • Dedicated GRI calendar • Candidates "need" notices • Instructor invitation video clips • Ask Me ribbons and buttons • Ambassador program	Eblasts sent to candidates monthly. Calendar updated frequently and housed on the GRI website.
Implement a Referral Contest for GRI students	
Maintain and enhance the GRI website as needed	Enhancements completed in January IT staff assisting with resolution to MyRecords functionality issues for students looking up their class records BS&T staff assisting with RAMCO functionality to track members GRI records/report functionality
Evaluate the program 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 survey will be sent to candidates in October.
Student feedback is favorable regarding quality and relevance	Extremely positive feedback received. 75% rate classes excellent.
Survey designees who earned the GRI designation in 2016 to identify what they implemented into their business practice from what they learned in the GRI program	Annual survey will be sent to candidates in October.
Maintain, monitor and grow a cadre of qualified instructors who meet the established GRI instructor criteria and AAR Instructor standards.	2 new instructors approved for GRI Financing class 1 new instructor approved for the GRI Agency class

	1 new application was reviewed by workgroup in August. Currently in audit stage.
Provide sufficient resources to update and refresh the Online Business Planning course	
Promotion efforts include video invitations and commercials	Instructor invitation videos and GRI commercial target completion: end of 3rd quarter.
Update the program brochure to strengthen the value/benefits message connection to building a successful career	Done – rolled GRI, CRMS and CRPM brochures into one brochure
Communication with Brokers to emphasize the value the program brings to their agents' business success and available scholarships	Quarterly eblasts are sent to brokers at the start of each scholarship period. Broker Awareness implementation is currently in process.
Provide GRI Administrative Guide to course providers.	Updated December 2016
Announce new designees on Facebook and to local associations and provided resources to help them promote their accomplishment.	On-going
Provide a financial scholarship program is available to members and evaluated annually	$15,000 scholarship fund approved for 2017 65 scholarships awarded in the 1st quarter 70 scholarships awarded in the 2nd quarter 50 scholarships awarded in the 3rd quarter 40 scholarships awarded in the 4th quarter Scholarship recipient feedback survey sent in August.
Monitor national trends in the GRI programs to keep AAR's GRI program growing and evolving.	On-going thru attendance at NAR meetings and State Education Director Summit as well as State Ed Director Facebook and Google group
Student demographics are compiled and evaluated annually	Ongoing

Spring Convention

This program involves planning, delivery and marketing of annual conference

Measurable objectives	Status
Offer a statewide conference 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 • Increase national speakers featured • Increase fun/social activities • Change conference name • Maintain dedicated conference webpage and Facebook • Enhance "ambassador" program • Professional video produced during the convention for use in future promotional efforts	• 4 national speakers featured/12 vendors confirmed • New conference name: Arizona REALTOR Convention • www.aaronline.com/convention • 501 attendees
Utilize a variety of marketing efforts to inform members of the convention and its value	AAR Facebook Event page utilized at the request of the Communication Workgroup. Big Yam developed convention flyer, 3 eblasts and 5 memes Through Communications committee, Big Yam included convention promotion on AAR Facebook page in addition to Facebook Event Page
Positive feedback is received.	
Explore and evaluate areas/locations for spring convention in 2018	Done 2018 convention: March 20-22 (Tuesday-Thursday) at the Renaissance, Glendale.

Support & Resources

This program includes support programs including:

- Printing, copying and postage
- Committee, workgroup and task force support
- Reteach.us platform enhancements
- Resources, tools subscriptions and license fees for program and development activities
- Promotion and marketing efforts
- Video commercial and invitation development

- Online registration ETF expenses
- Meeting and training attendance

Measurable objectives	Status
Appropriate groups are formed and kept updated throughout the year.	Ongoing
Provide the necessary equipment, supplies, subscriptions, licenses and tools to implement the business plans, host/house online program and registration functions	Ongoing
Production of video trailer commercials and testimonial video clips for AAR's education programs and classes.	In process: 1) rCRMS; 2) GRI Completed: convention
Participate in local association and firm events, where available to promote AAR's educational programs and resources	January Coldwell Banker Quarterly Event January CCIM/IREM event PBD booth at September WeMAR Expo
Work with a marketing firm to assist in evaluating and developing promotional brochures for GRI, rCRMS and CRPM incorporating positive perception of education to business success	Big Yam redesign brochures and incorporated GRI, rCRMS and CRPM into one brochure. Three standup banners reflecting each panel on the brochure
Work through appropriate committees to influence ADRE to permit C/E Credit for business-skill related topics	No action at this time needed
Maintain and enhance the platform for members to write reviews for classes and instructors (Reteach.us).	www.REteach.us
Staff attendance at AAR, NAR and State Education Director conferences/forums and visits local association remote classrooms	Staff attended NAR Mid-Year Meeting in May Staff attended State Ed Director Retreat via satellite.
Provide for needed knowledge and skills for staff to develop and hone required knowledge and skills	Staff attended ASAE Experience conference in May – creating the member experience at events and numerous webinars focusing on micro-learning, engaging students, etc.