

2020 PBD Measurable Objective Update

From: Professional and Business Development (PBD) Committee
Chair: Marci Slater
Staff Liaison: Barb Freestone
Date: February 26, 2020

REALTOR® - The best prepared real estate professional with the highest standards.

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

Current Top Priorities

- Convention –Marketing
- Education Outreach program implementation
- GRI – new course development on Negotiation
- LTA - implementation

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Mandy Neat
- Convention Planning – Mandy Neat
- Broker Workgroup – Serena Jones
- Leadership Journey Task Force

BROKER UNIVERSITY

This plan provides for the development and/or delivery of education programs/resources designed specifically for brokers and managers on how to efficiently and effectively run a brokerage firm, stay informed of emerging trends and regulations, and create a sense that the Arizona REALTORS® is a trusted source of educational resources and opportunities for their agents.

Measurable Objectives	Status
Offer a small broker, medium broker and large broker forum	Workgroup

Communicate programs or information to the brokerage community that focus on operational issues and available resources	
Maintain an 80% student satisfaction in all classes.	
Provide information quarterly to brokers about Arizona REALTORS education programs and resources available to their agents.	
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	Scheduled for: <ul style="list-style-type: none"> • Convention (Advanced BMC1 and 2) • August (live streaming) (Advanced BMC 1, 2 and 3)
Produce and distribute webinars focusing on issues important to brokers as needed.	
Identify content and structure for a Broker Tab on AARonline.com and work with Risk Management and BS&T to implement	Workgroup agenda item
Continue to produce and distribute Mack In A Minute videos series and Contract Conversation video series.	Replacing Mack In a Minute videos with 2020 with Scott's Legal Scoop monthly videos rolling out in February Current Contract Conversation Videos: <ul style="list-style-type: none"> • Residential Resale Real Estate Purchase Contract • READE • BINSR • Buyer Contingency • Cure Notice • Vacant Land/Lot Purchase Contract Contract Conversation Videos to be produced in 2020: <ul style="list-style-type: none"> • Limited Representation • Notice Form • HOA Addendum

rCRMS (Certified Risk Management Specialist)

This plan provides for an education certification program that is designed to enhance member's knowledge on how to manage and minimize member's liability. The rCRMS program is the only state-specific risk management program available to the Arizona REALTORS® members.

Measurable Objectives	Status
Offer rCRMS classes through association partnerships and live streaming at a competitive and affordable price.	Done - ongoing
Monitor attendee feedback to update curriculum as needed.	Ongoing
Maintain a cadre of qualified instructors who meet the Arizona REALTORS® adopted Instructor Standards and bring practical experience to the program.	Marge Lindsay Kathy Laswick Mary Frances Coleman Jesi Wolnik Rick Mack
Maintain a dedicated instructor page to house course materials.	Done – ongoing maintenance
Offer rCRMS certification holders discounted class registration fees.	Done
Maintain an 80% student satisfaction in all classes.	On-going
Recognize newly certified members on the Arizona REALTORS® Facebook page and announced to local associations.	Monthly

EDUCATION OUTREACH

This program provides partnership opportunities with local associations, the brokerage communities and allied industries to deliver education programs that provide comprehensive, reliable, and accessible professional development programs that focus on building member success. This program also offers an annual Trends Summit to prepare members for changing trends and business practices in the industry.

Measurable Objectives	Status
Maintain and grow a cadre of qualified instructors who meet the Arizona REALTORS® adopted Instructor Standards.	Beth Adams added to cadre Fletcher Wilcox (pending)
Offer, through partnership and revenue share opportunities with local associations and brokerages, c/e, designation and certification courses, delivered live and live streamed.	On-going
Maintain an 80% student satisfaction in all classes.	On-going
Assist partners in marketing AAR-sponsored education classes.	Course eblasts using 3 touch approach:

	1 st email: members in class location and surrounding areas 2 nd email: members who have attended similar course in the past 3 rd email: members who have opened either email 1 or email 2
Provide local associations with an annual education reference guide.	
Deliver an Annual program featuring national speakers for changing trends and business practices in the industry.	Early December
Monitor and engage, when feasible, in opportunities or partnerships to provide new agent resources/training opportunities.	
Offer an annual Education Workshop for local association education staff/chairs.	Tentatively planned for July Education Workshop will be held in conjunction with Instructor Forum

EDUCATION DEVELOPMENT

This plan provides for the development of education programs that focus on member competencies and address current issues and trends that position the REALTOR® member to grow and succeed. This plan also sets the foundation that raises the bar in the effectiveness of online education in both content and delivery through development and/or partner with online course providers.

Measurable Objectives	Status
Maintain and update learning management platform license.	Ongoing
Monitor and enhance live streaming platform to ensure it provides an effective learning experience.	Ongoing Feedback reviewed from evaluations, monitors and staff
Continue to investigate and implement new education platforms that allow us to reach our members as well as engage them interactively in a learning environment.	
Curriculum development and delivery resources are available to develop quality programs.	
All course curricula include practical experience and student engagement and shall be learner-focused.	

Produce a minimum of 3 Contract Conversation videos.	
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INSTRUCTOR DEVELOPMENT

This plan provides resources, tools and growth opportunities to ensure the Arizona REALTORS® attracts, retains and develops instructors who have exceptional skills and embrace modern teaching techniques. Investing in instructor growth is a critical to the Arizona REALTORS® efforts in providing quality education programs.

Measurable Objectives	Status
Provide a minimum of one Instructor Development Workshop focusing on modern teaching techniques that adapt to the modern learner.	November 4, 2020
Offer an Instructor Forum to give Arizona REALTORS instructors an opportunity to network and share teaching strategies, engagement activities and technology tools with each other.	July 15 (will be held in conjunction with Education Leadership Workshop)
Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices.	Task force will discuss and submit recommendations
Provide training and resources to instructors who teach the association's live streaming classes.	
Monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	Ongoing Facebook group posts February 7 PowerPoint Workshop
Encourage instructors to promote C2EX information in all AAR sponsored classes.	
Provide one scholarship to the Bob Pike "Train the Trainer" for one new Arizona REALTORS® instructor who would benefit from the program.	Recipient: Keri Means

INDUSTRY PARTNERS CONFERENCE

This plan affords the Arizona REALTORS® an opportunity to partner with the Arizona Mortgage Lenders 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
Participate as a partner with the Arizona Mortgage Lenders Association and Arizona State Escrow Association, to offer a program designed to help members understand each other's role in the real estate transaction.	August 25 (Desert Willow Conference Center, Phoenix)

LEADERSHIP TRAINING & DEVELOPMENT

This plan provides leadership training programs to develop REALTOR® and member leaders and a conference for on-going development leaders.

Measurable Objectives	Status
Offer an annual conference for incoming leadership and members who wish to become leaders.	October 21-23, 2020 (Renaissance Glendale Hotel & Spa)
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	LTA1: March 3-4 LTA2: April 28-29 LTA3: June 9-10 LTA4: August 27-28 (14 presidents-elect attending in 2020)
Develop and/or partner to provide opportunities to enhance leadership skills and pathway to Leadership.	
Provide resources addressing "how to be a leader – where do I start?"	Task Force to develop April-May

MRES SOCIETY

This plan provides a recognition and marketing vehicle for members to assist in positioning themselves as trusted, knowledgeable and skilled professionals as well as growth resources for new agents who strive to succeed.

Measurable Objectives	Status
Recognize members' life-long learning commitment through a membership-based program connected to educational accomplishments.	
Distribute MRES Society information	

through targeted eblasts, rCRMS/GRI classes and social media channels.	
Increase MRES Society membership by 10%.	
Monitor and promote NAR's Commitment to Excellence program.	Banner and badge ribbons at convention Pins to be distributed to endorsed members throughout the year (including those that received endorsement in 2019)
Annual survey to MRES members to evaluate membership value.	September
Co-host an annual webinar week with the GRI program to provide a special educational webinar week.	September

PROPERTY MANAGEMENT CERTIFICATION

This plan provides for an education certification program (CRPM) that is designed to enhance member's skills and knowledge in the property management field. The CRPM program is the only state-specific residential property management program available to the Arizona REALTORS® members.

Measurable Objectives	Status
Offer <u>CRPM classes</u> at a competitive and affordable fee through partnership with local associations, firms and NARPM.	56 earned certification in 2019 289 members currently hold the rCRMS
Maintain a cadre of qualified instructors who meet the Arizona REALTORS® adopted Instructor Standards and bring practical experience to the program.	
Maintain an 80% student satisfaction in all classes.	
Offer timely webinars focusing on property management issues.	
Offer a Summit that addresses property management issues and topics.	December 6, 2020 (Venue 8600)
Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations.	Monthly or as needed

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.

Measurable Objectives	Status
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	Done 45 courses scheduled to date 5 local associations offering GRI classes 1 firm offering GRI classes
Co-host an annual webinar week with the MRES Society program to provide a special educational webinar week.	September
Maintain and enhance the GRI website as needed.	On-going
Evaluate the program annually to ensure it is responsive to the changing industry.	
Survey designees who earned the GRI designation to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program.	
Maintain, monitor and grow a cadre of qualified instructors who meet the established GRI instructor criteria, the Arizona REALTORS® instructor standards and embrace learner-centered teaching styles.	On-going
Update and maintain the Online Business Planning course.	June-August
Utilize marketing messages that focus on the value/benefits - connection to building a successful career.	
Communicate quarterly with brokers to emphasize the value the program brings to their agents' business success and available scholarships.	
Provide GRI Administrative Guide to course providers.	Posted on the GRI website-Admin portal
Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment.	

Provide a financial scholarship program to members.	\$15,000 budgeted for 2020
Monitor national trends in the GRI programs to keep the Arizona REALTORS® GRI program growing and evolving.	
Compile and monitor student demographics.	

REALTOR® CONVENTION

This plan offers a premier annual REALTOR® event that: (1) energizes members and leaves them full of passion for the real estate industry and their business; (2) provides an opportunity for members to build their networks; (3) provides an opportunity to discover best practices; and (4) helps members understand the Arizona REALTORS® value proposition and also includes the Arizona REALTORS® business meetings (Executive Committee, Regional Caucuses and the Board of Directors Meeting). Conference format varies from year to year.

Measurable Objectives	Status
Offer a statewide convention 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 energizing networking opportunities.	
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	Walter Bond, Leigh Brown, Marki Lemons, Amy Broghamer
Utilize a variety of marketing efforts to inform members of the convention and its value, promote date and location one year in advance.	E-blast, facebook ads/boosted posts, ad in BMQ quarterly (1 st quarter), flyers at events, marketing toolkit provided to AE's and AAR leadership
Provide sessions that assist members in enhancing their business and in understanding the Arizona REALTORS® value proposition and benefits.	
Investigate partnership/promotion opportunities with brokerages, builders and other real estate related organizations.	
Investigate third party marketing with Requests for Proposals and retain if advisable.	
Identify facility for 2021-2023 conventions	
Promote convention one year in advance.	

Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members.	Done (Marketing Toolkit)
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SUPPORT & RESOURCES

This is a support budget for services and resources that contribute to the development, administration and offering of the Arizona REALTORS® educational programs and products that provide high-level skill based and risk management programs that focus on member competencies and set the standard in quality and meaningful education that positions the REALTOR® member to succeed. The ultimate goal of all programs and activities ultimately lead to a culture of lifelong learning.

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.	
Focus program and class messages to connect with members' success/transaction solutions.	
Print and/or distribute collateral at the Arizona REALTORS® and/or local events.	
Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics.	
Monitor and maintain the use of the Reteach.us site.	Ongoing
Employ technologies and resources to create and retain a state-of-the-art learning environment available to members.	
Maintain a monthly calendar for the Arizona REALTORS® education and events and monitor its open/action rates.	Done - ongoing
Provide resources for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums.	Done via budget
Utilize eblast target marketing for education programs using the 3-touch approach as well as social media vehicles.	Facebook ads for CRPM, rCRMS, GRI, MRES Society, programs

Monitor program marketing efforts/results.	
Identify and monitor student demographics for each of the Arizona REALTORS® education programs and utilize in target marketing efforts.	