

2020 PBD Measurable Objective Update

From: Professional and Business Development (PBD) Committee
Chair: Marci Slater
Staff Liaison: Barb Freestone
Date: May 18, 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

- Education Outreach program implementation
- GRI – new course development on Negotiation
- LTA – implementation
- Leadership Journey Task Force
- Broker Forum implementation (May 20 rollout)
- Conversion to Zoom direct to members, as needed during the COVID pandemic

Recommendations

- None at this time

Groups Formed

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

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	Recommendation approved to offer a monthly virtual Broker Forum 3 rd week In each month, 10:00-11:15am

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.	Designation and certification information included in quarterly GRI scholarship eblast
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	Scheduled for: Convention (will identify new date for BMC offering) August (live streaming)
Produce and distribute webinars focusing on issues important to brokers as needed.	Industry Update: Open for Business: Broker Perspective Zoom event held March 30 for brokers COVID19 Relief Hotline Issues with Rick Mack Zoom event May 1 NEW: Quarterly Legal Hotline Webcasts will start in June.
Identify content and structure for a Broker Tab on AARonline.com and work with Risk Management and BS&T to implement	Workgroup developing – anticipate recommendation by early summer
Continue to produce and distribute Mack In A Minute videos series and Contract Conversation video series.	Scott's Scoop video rolled out in April. Mack in a Minute will continue quarterly or as needed

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®	Marge Lindsay Kathy Laswick Mary Frances Coleman

adopted Instructor Standards and bring practical experience to the program.	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.	Meets or exceeds
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) Susan Nicolson (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.	Meets or exceeds
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.	Course Catalog in final stages of development

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.	Scheduled for July 15

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.	Upgraded Zoom license for additional features Obtained license for MentiMeter which is a polling software similar to PollEverywhere
Curriculum development and delivery resources are available to develop quality programs.	Zoom platform upgraded Zoom training for instructors held in April
All course curricula include practical experience and student engagement and shall be learner-focused.	Ongoing
Produce a minimum of 3 Contract Conversation videos.	Timeframe: late summer

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
Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices.	Task force to be appointed to address
Provide training and resources to instructors who teach the association's live streaming classes.	Zoom instructor training held April 24 th Provided Best Practices for Teaching Thru Zoom Platform to local associations and instructors
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.	April 30 Zoom event featuring Lisa Paffrath highlighting features of the C2EX platform
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	Tentative date: August 25 (Desert Willow Conference Center, Phoenix)

understand each other's role in the real estate transaction.	Discussion with partners regarding the feasibility of holding, cancelling or offering virtually this year
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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 (to be rescheduled) LTA3: June 9-10 (virtual format) LTA2: August 27--28 LTA4 - September
Develop and/or partner to provide opportunities to enhance leadership skills and pathway to Leadership.	Zoom event held May 5 th with Lisa Paffrath – The Power of the R and Leadership Journey
Provide resources addressing “how to be a leader – where do I start?”	Task Force in process of developing recommendations

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.	MRES Society
Distribute MRES Society information through targeted eblasts, rCRMS/GRI classes and social media channels.	Targeted eblasts and facebook ads
Increase MRES Society membership by 10%.	Application period closed on March 1 st . 20 Copper (new) members 20 Sterling (renewing) members 10 Gold members

Monitor and promote NAR's Commitment to Excellence program.	April 30 Zoom event held with Lisa Paffrath highlighting C2EX platform features
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.	On-going
Maintain an 80% student satisfaction in all classes.	Meets or exceeds
Offer timely webinars focusing on property management issues.	Industry Update Zoom event held for property managers March 30
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
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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.	June Confirmed speakers: Nobu Hata – June 1 Katie Lance – June 2 Shay Hata – June 3 Marki Lemons June 4
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.	1 st term email sent 12/2019 2 nd term email sent 4/2020
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.	Monthly on Facebook and the GRI website.
Provide a financial scholarship program to members.	\$15,000 budgeted for 2020 37 scholarships awarded in the 1 st term 51 scholarships awarded in the 2 nd term

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.	Due to COVID19 – convention cancelled
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.	Blasts and social media Flyers provided to local associations Speaker videos disseminated Marketing toolkit provided to officers and AE's
Provide sessions that assist members in enhancing their business and in understanding the Arizona REALTORS® value proposition and benefits.	Leigh Brown, Marki Lemons and Amy Broghamer's breakout sessions offered via zoom in April/May. Virtual Convention networking event scheduled for May 21
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	Currently discussing feasibility of scheduling convention after REALTOR Caucus in 2021
Promote convention one year in advance.	
Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members.	Done – marketing kit

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.	On-going
Focus program and class messages to connect with members' success/transaction solutions.	On-going
Print and/or distribute collateral at the Arizona REALTORS® and/or local events.	As opportunities exist
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.	Ongoing
Maintain a monthly calendar for the Arizona REALTORS® education and events and monitor its open/action rates.	Done plus 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.	On-going
Identify and monitor student demographics for each of the Arizona REALTORS® education programs and utilize in target marketing efforts.	