

## 2020 PBD Measurable Objective Update

**From:** Professional and Business Development (PBD) Committee  
**Chair:** Marci Slater  
**Staff Liaison:** Barb Freestone  
**Date:** Sept 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**

- Monthly Broker Forums
- Monthly Property Management Forums
- Education class conversation to Direct to Member education delivery thru December
- Leadership Conference – virtual conversion
- Professionalism Task Force review and recommendations

### **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
- Professionalism Task Force – Sindy Ready

## **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.

<b>Measurable Objectives</b>	<b>Status</b>
Offer a small broker, medium broker and large broker forum	Recommendation approved to offer a monthly virtual Broker Forum 3 <sup>rd</sup> week In each month, 10:00-11:15am

	<p>June 17  July 15  August 19  September 16  October 14  November 18  December 16</p>
Communicate programs or information to the brokerage community that focus on operational issues and available resources	Monthly virtual Broker to Broker Forums rolled out in June
Maintain an 80% student satisfaction in all classes.	ABMC - done
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 eblasts sent on: 12/2019 4/2020 8/3/2020
Offer a minimum of two Broker Management Clinics that incorporate practical based content.	August 3,4, 5: 43 attendees September 16,17,18 – 32 registered
Produce and distribute webinars focusing on issues important to brokers as needed.	<p>Industry Update: Open for Business: Broker Perspective Zoom event held March 30 for brokers</p> <p>COVID19 Relief Hotline Issues with Rick Mack Zoom event May 1 – 171 registered</p> <p>NEW: Quarterly Legal Hotline Webcasts will start in June - 286 registered</p>
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® 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.	Meets or exceeds
Recognize newly certified members on the Arizona REALTORS® Facebook page and announced to local associations.	Monthly  310 members hold the certification (25 earned the certification to date this year)

### **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.	In process
Offer, through partnership and revenue share opportunities with local associations and brokerages, c/e, designation and	On-going

certification courses, delivered live and live streamed.	
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 <sup>st</sup> email: members in class location and surrounding areas <b>Average open rate: 33%</b> 2 <sup>nd</sup> email: members who have attended similar course in the past <b>Average open rate: 25%</b> 3 <sup>rd</sup> email: members who have opened either email 1 or email 2 <b>Average open rate: 48%</b>
Provide local associations with an annual education reference guide.	Course Catalog developed – will be distributed to local associations in early Fall
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.	Monitoring REBI's New Agent Training Program
Offer an annual Education Workshop for local association education staff/chairs.	Cancelled due to COVID

**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.

<b>Measurable Objectives</b>	<b>Status</b>
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 And September
All course curricula include practical experience and student engagement and shall be learner-focused.	Ongoing
Produce a minimum of 3 Contract Conversation videos.	HOA Addendum video rolled out in late September

### **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.

<b>Measurable Objectives</b>	<b>Status</b>
Provide a minimum of one Instructor Development Workshop. focusing on modern teaching techniques that adapt to the modern learner.	July 24: 25 instructors attended
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.	Due to COVID – July 15 cancelled
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 <sup>th</sup> Provided Best Practices for Teaching Thru Zoom Platform to local associations and instructors

	September 1: Kim Zerby with the Bob Pike Group will be leading an exclusive session: Swift Steps to Virtual Success in the Classroom for AAR instructors (13 AAR instructors attended)
Monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	Ongoing Facebook group posts February 7 PowerPoint Workshop Zoom Teach tips best practices distributed to instructors (17 attended)
Encourage instructors to promote C2EX information in all AAR sponsored classes.	April 30 Zoom event featuring Lisa Paffrath highlighting features of the C2EX platform (60 registered) Current C2EX endorsed member roster distributed to local associations in early August C2EX information will appear in 3 <sup>rd</sup> Quarter BMQ Newsletter C2EX information included in virtual class break slides
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.

<b>Measurable Objectives</b>	<b>Status</b>
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.	2020 Cancelled – will be rescheduled for February-March 2021

### **LEADERSHIP TRAINING & DEVELOPMENT**

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

<b>Measurable Objectives</b>	<b>Status</b>
Offer an annual conference for incoming leadership and members who wish to become leaders.	October 20-23, 2020 – converted to virtual conference
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 (virtual format) LTA4 – September 17-18 (virtual format)
Develop and/or partner to provide opportunities to enhance leadership skills and pathway to Leadership.	Zoom event held May 5 <sup>th</sup> with Lisa Paffrath – The Power of the R and Leadership Journey (90 registered)
Provide resources addressing “how to be a leader – where do I start?”	Committee approved task force to Deliver a Leadership Week starting in 2021 (webinar format)

**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.

<b>Measurable Objectives</b>	<b>Status</b>
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 <sup>st</sup> . 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 Current C2EX endorsed member roster distributed to local associations in early August

	C2EX information will appear in 3 <sup>rd</sup> Quarter BMQ Newsletter C2EX information included in virtual class break slides
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.	Done - June

### **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.

<b>Measurable Objectives</b>	<b>Status</b>
Offer <u>CRPM classes</u> at a competitive and affordable fee through partnership with local associations, firms and NARPM.	20 earned the certification in 2020 to date 208 members currently hold the CRPM
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.	Monthly virtual Property Management Forums rolled out in September – very well received  Industry Update Zoom event held for property managers March 30 (292 registered)  Industry Update: Managing Your Property Management Business Under the COVID-19 Pandemic Executive Orders on August 26
Offer a Summit that addresses property management issues and topics.	December 10, 2020 (Venue 8600) – live event converted to virtual event



Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations.	Monthly or as needed
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## **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.

<b>Measurable Objectives</b>	<b>Status</b>
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	Done 45 courses originally scheduled 34 courses now scheduled 11 courses cancelled during COVID 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.	Held in June Nobu Hata – June 1 Katie Lance – June 2 Shay Hata – June 3 Marki Lemons June 4 <i>Note: 2021 the webinars will most likely convert to quarterly (1 per quarter vs. all in one week)</i>
Maintain and enhance the GRI website as needed.	On-going
Evaluate the program annually to ensure it is responsive to the changing industry.	On-going
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.	
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 <sup>st</sup> term email sent 12/2019 2 <sup>nd</sup> term email sent 4/2020 3 <sup>rd</sup> term email sent 8/3/2020
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 64 scholarships awarded in the 1 <sup>st</sup> term 66 scholarships awarded in the 2 <sup>nd</sup> term 36 scholarships awarded in the 2 <sup>nd</sup> term
Monitor national trends in the GRI programs to keep the Arizona REALTORS® GRI program growing and evolving.	On-going
Compile and monitor student demographics.	<b>GRI student:</b> 20.6% over 10 years 8.7% 7-10 years 16.9% 4-6 years 28.7% 1-3 years 25.1% - less than 1 year  1% under age 25 7.3% 25-34 years old 19.8% 35-44 years old 37% - 45-54 years old 35% - over 55 years old Majority of students are agents  42% said someone encouraged them to start their GRI journey 58% said no one encouraged them to start their GRI journey

## **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.

<b>Measurable Objectives</b>	<b>Status</b>
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.	In process of scheduling 2021 convention.

	Note: based on recommendations from task force in 2019, convention will be separated from March governance meetings and held in late August 2021 following REALTOR Caucus)
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.

<b>Measurable Objectives</b>	<b>Status</b>
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 Adapted quickly to utilizing Zoom for direct-to-member education programs during COVID Utilized Zoom feature to live stream events to AAR’s facebook page

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.	<p><b>GRI student:</b>  20.6% over 10 years  8.7% 7-10 years  16.9% 4-6 years  28.7% 1-3 years  25.1% - less than 1 year</p> <p>1% under age 25  7.3% 25-34 years old  19.8% 35-44 years old  37% - 45-54 years old  35% - over 55 years old  Majority of students are agents</p> <p><b>rCRMS student:</b>  39% over 10 years  13% 6-10 years  48% 1-5 years</p> <p>Majority of students are agents</p> <p>41% taking classes for rCRMS credit  29.5% taking class for GRI credit  29.5% taking class for both GRI and CRMS credit</p>