

| |
|---|
| 2021 PBD Measurable Objective Update |
|---|

From: Professional and Business Development (PBD) Committee
Chair: Mandy Neat
Staff Liaison: Barb Freestone
Date: February 26, 2021

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

- 2021 Education Calendar
- Education class re-conversation protocols in preparation for Direct to Classroom delivery starting 2nd quarter 2021
- LTA program – finalize updating content/delivery
- Professionalism Campaign – roll out
- MRES Society Task Force, Professionalism Certification Task Force and New Member Education Program Task Force – begin
- Monthly GRI Scholarship announcements

Recommendations

- None at this time

Groups Formed

- GRI Oversight Workgroup – Barbara Wilson
- Broker Workgroup – Serena Jones
- CRPM Advisory Board – Sue Flucke
- Professionalism Certification Task Force
- New Member Education Program Task Force

BROKER UNIVERSITY

This plan provides for the development delivery or promotion of education programs/resources designed specifically for brokers and managers on how to efficiently and effectively run a brokerage firm, stay informed of emerging legal issues, trends and regulations.

| | |
|------------------------------|--|
| Measurable Objectives | |
|------------------------------|--|

| | |
|--|-------------------------------|
| Offer programs designed to keep brokers educated and updated on issues and trends. | Monthly virtual broker forums |
| Investigate and offer, if feasible, CRB classes virtually. | |
| Provide a packet of Arizona REALTORS education program overview to brokers. | |
| Work with BS&T to recognize branch manager roles into membership database. | Done |

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 | |
|--|--|
| Partnership opportunities are available to local associations and firms for live and virtual offerings. | Done |
| Monitor attendee feedback to update curriculum as needed. | On-going – student evaluations after each class |
| Maintain a cadre of qualified instructors. | On-going Beth Adams has been added to the instructor cadre |
| Maintain a dedicated instructor page to house course materials. | On-going |
| Provide competitive and affordable registration fees including a discounted registration fees for rCRMS holders. | Registration fees Member: \$59/\$79 (one-day class) \$89/\$99 (two-day class) rCRMS holders receive \$19 discount |
| Recognize newly certified members on the Arizona REALTORS® social media | On-going |

EDUCATION OUTREACH

The Arizona REALTORS® provides comprehensive, reliable, and accessible professional development that is learner-centered to REALTOR® members. This program establishes an overall structure for partnership opportunities with local associations, brokerages and allied industries to deliver education programs at competitive and affordable fees through live classroom and live streaming classes. This program also includes an

annual Trends Summit to prepare members for changing trends and business practices in the industry.

| Measurable Objectives | |
|---|--|
| Maintain and grow a cadre of qualified instructors | On-going Beth Adams and Fletcher Wilcox will join the cadre in 2021 |
| Provide partnership opportunities for direct offerings and revenue share opportunities for live streaming classes for education related classes in the PBD business plan. | On-going |
| Maintain an 80% student satisfaction level in all classes offered relating to relevancy, engagement and application. | On-going |
| Assist partners in marketing AAR-sponsored education classes. | On-going |
| Provide local associations with an annual education catalog. | |
| Deliver an Annual program featuring national speakers for changing trends and business practices in the industry. | Insights-2021 virtual event held January 7, 2021 |
| Investigate the feasibility of developing or offering a professionalism program or certification. | Task Force appointed |
| Investigate the desirability to develop, partner or deliver an education program designed to help new members grow a successful and professional business, incorporating resources and tools available through the REALTOR® associations. | Task Force appointed |
| Offer an annual Education Workshop for local association education staff/chairs. | July |
| Connect with local association Education Chairs/Staff for information sharing/help where needed. | |

EDUCATION DEVELOPMENT

This plan sets the foundation that raises the bar in the quality of online and live education in content design. Education program development provides direction and structure to be learner focused and contain engagement and application activities that position the REALTOR® member to grow and succeed.

| Measurable Objectives | |
|--|----------------------------------|
| Maintain and update education platform license. | On-going – Learning Library |
| Monitor and enhance live streaming platform to ensure it provides an effective learning experience. | On-going |
| 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. | |
| Produce a minimum of 3 Contract Conversation videos. | Recording timeframe: Spring 2021 |

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 | |
|--|--|
| Provide Instructor Development Workshop(s) focusing on modern teaching techniques that adapt to the modern learner. | |
| Provide opportunities for instructors to network and share teaching strategies, engagement activities and technology tools with each other. | |
| Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices. | |
| Provide training and resources to instructors who teach the association’s live streaming classes. | Bob Pike Custom Workshop for AAR) Virtual Instructional Design Crash Course – February 3 |

| | |
|--|---|
| Continue to proactively monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills. | On-going |
| Provide information to 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. | Budgeted |
| Recognize an exceptional instructor through Excellence in Education Award. | Awarded at Leadership Conference Nominations submitted by local associations in September-early October |

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. | |

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 13-15, 2021 (Embassy Suites, Phoenix-Scottsdale) |
| Offer a leadership development program (LTA) specifically for incoming local association presidents-elect. | Done (LTA1 and 2 will be virtual / LTA3 and 4 planned for live in-person) Virtual Meet N Greet: February 25, 4:00 – 5:15ish LTA1 (3 segments) (The Leader Within You) March 10, 1:00 – 5:00 LTA1a |

| | |
|---|--|
| | <p>March 11: 9:00 – Noon LTAb March 24, 1:00 – 5:00 LTA1c</p> <p>LTA2 (3 segments) (Effective Leadership) April 14, 1:00 – 5:00 LTA2a April 15, 9:00 – Noon LTA2b May 26, 9:00 – 1:30 LTA2c</p> <p>LTA3 (Your Leadership Role) July 28-29 9:00 -4:00 LTA3 (in-person)</p> <p>LTA 4 (The Business of the REALTOR Association) September 2 – 9:00 – 4:00 LTA4 (in-person after Convention)</p> |
| Develop and/or partner to provide opportunities to enhance leadership skills and pathway to Leadership. | <p>September Leadership Week Parliamentary Procedures Workshop with Sindy Ready – March 3rd Digital Leadership Webinar – Brian Copeland</p> |
| Provide resources addressing “how to be a leader – where do I start?” | |

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 | |
|---|---|
| Recognize members’ life-long learning commitment through a membership-based program connected to educational accomplishments. | On-hold – Task force re-evaluating |
| 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. | |
| Annual survey to MRES members to evaluate membership value. | August |
| Co-host a quarterly annual webinar with the GRI program to provide a special educational webinar week. | February 24: Brian Copeland (The Automation Effect) |

| | |
|--|---|
| | May 19: Monica Neubauer (Multiple Offer Strategies) |
| Investigate virtual opportunities for MRES members to network with each other. | |

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 | |
|--|---|
| Partnership opportunities are available to local associations and firms for live and virtual offerings. | Done – on-going |
| Maintain a cadre of qualified instructors. | |
| Offer a Summit and or webinars that addresses property management issues and topics. | Summit date: December 9, 2021 Quarterly virtual Property Management Forums |
| Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations. | |

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 | |
|--|-----------------|
| The GRI program is available and accessible to members throughout the state through partnerships and live streaming. | Done – on-going |
| Co-host a quarterly_webinar week with the MRES Society program to provide a special educational webinar week. | |
| Maintain and enhance the GRI website as needed. | On-going |
| Evaluate the program annually. | September |

| | |
|---|--|
| Survey designees to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program. | September-October |
| Maintain, monitor and grow a cadre of qualified instructors. | On-going |
| Update and maintain the Online Business Planning course. | In process |
| Pre-announce scholarship entry dates to brokers with a reminder of the value of GRI to their agent's success. | Done - On-going |
| Provide GRI Administration orientation to new education staff. | As Needed |
| Recognize new designees through social media and announcements and provide resources to help them promote their accomplishment. | Monthly |
| Provide a financial scholarship program to members. | \$15,000 dedicated in the budget Scholarships will be awarded monthly January: 12 scholarships awarded. February: 36 scholarships awarded |
| Monitor national trends in the GRI programs to keep the Arizona REALTORS® GRI program growing and evolving. | On-going |
| Compile and monitor student demographics. | Timeframe: Fall for demographic updates |

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 | |
|---|--|
| 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 | August 31-September 1 (following REALTOR Caucus (Scottsdale Plaza Resort)) |

| | |
|---|--|
| as well as energizing networking opportunities. | |
| Feature national speakers to provide a broad scope in national business practices, trends and techniques. | |
| Utilize a variety of marketing efforts to inform members of the convention and its value, promote date and location one year in advance. | |
| 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 and implement, if feasible, virtual delivery option. | |
| Identify facility for 2022-2023 conventions | |
| Promote convention one year in advance. | |
| Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members. | |

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 | |
|---|---------------------|
| Appropriate groups are formed and kept updated throughout the year. | On-going |
| 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. | |
| Participate in firm and local events when available to promote education programs. | As available/needed |

| | |
|---|---|
| Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics. | |
| Evaluate the feasibility of an education app which could house the education calendar, class evaluations and registration information and how the Reteach site could be incorporated. | |
| Appropriate technologies and resources are available and utilized to create and retain a state-of-the-art learning environment available to members. | Learning Library-online GRI class Zoom platform – live streaming direct to member and direct to local classroom |
| Maintain a monthly calendar for the Arizona REALTORS® education and events and monitor its open/action rates. | On-going |
| Appropriate resources are available for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums. | Staff attended February Training Magazine Conference Staff attended CANVA training Staff attended Bob Pike Making Zoom Interactive Crash Course Staff attended Bob Pike Checklist for Kick-Ass Virtual Training Staff attended Highly Engaging Activities for Virtual Training Webinar Staff attended various Bob Pike training webinars Staff attended Masterclass for Zoom Staff attended a Zoom Masterclass Staff earned the Cvent certification |
| Utilize eblast target marketing for education programs using the 3-touch approach as well as social media vehicles. | 1 st email to all members in class area, 2 nd email to past students, 3 rd email to members who opened either of the first two emails. |
| Targeted marketing methods are utilized to promote education offerings. | Eblast targets include members in class location, past students and members who opened previous emails |
| Identify and monitor student demographics for each of the Arizona REALTORS® education programs and utilize in target marketing efforts. | Target Fall for demographic updates |