

2021 PBD Measurable Objective Update

From: Professional and Business Development (PBD) Committee
Chair: Mandy Neat
Staff Liaison: Barb Freestone
Date: September 20, 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

- Education Outreach schedule - 2022
- Education Achievement Program rollout
- Leadership Conference
- Field test second new agent training program - October

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
- MRES Society Review Task Force – Kathy Laswick
- New Member Education Program Task Force – Chair Lisa Paffrath

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 Excellent feedback received to date.
Investigate and offer, if feasible, CRB classes virtually.	Done

Provide a packet of Arizona REALTORS education program overview to brokers.	Agenda item
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.	On-going
Monitor attendee feedback to update curriculum as needed.	On-going
Maintain a cadre of qualified instructors.	On-going Beth Adams added to instructor cadre
Maintain a dedicated instructor page to house course materials.	On-going
Provide competitive and affordable registration fees including a discounted registration fee for rCRMS holders.	Done
Recognize newly certified members on the Arizona REALTORS® social media	On-going There are currently 233 members who hold the rCRMS certification.

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 added to 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.	Done Note: Majority of classes held to date are direct to member however, revenue shares continue to be provided to local associations
Maintain an 80% student satisfaction level in all classes offered relating to relevancy, engagement, and application.	Done – on-going
Assist partners in marketing AAR-sponsored education classes.	On-going
Provide local associations with an annual education catalog.	Class information has been provided to the associations.
Deliver an Annual program featuring national speakers for changing trends and business practices in the industry.	
Investigate the feasibility of developing or offering a professionalism program or certification.	Task force
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 in process Two programs have been identified to field test – one program conducted in July with positive feedback, the other program will be field-tested in late October (Oct 22, 27, 28, 29 –/10:30 – 12:30 via Zoom).
Offer an annual Education Workshop for local association education staff/chairs.	Based on feedback from local associations, determined not needed.
Connect with local association Education Chairs/Staff for information sharing/help where needed.	On-going, as 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	On-going

to ensure it provides an effective learning experience.	
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.	On-going
Curriculum development and delivery resources are available to develop quality programs.	Done
Produce a minimum of 3 Contract Conversation videos.	3 new videos produced to date: <ul style="list-style-type: none"> • Additional Clause Addendum • Residential Listing Contract Exclusive Right to Sell https://www.aaronline.com/contract-conversations/

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.	April 30, 2021 November 9, 2021
Provide opportunities for instructors to network and share teaching strategies, engagement activities and technology tools with each other.	Rolled out a series of 3 Instructor Mastermind sessions in March – positive feedback received
Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices.	Done
Provide training and resources to instructors who teach the association’s live streaming classes.	Done – staff shared information for upcoming Bob Pike webinars/resources to instructors throughout the year.
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.	Done
Provide one scholarship to the Bob Pike "Train the Trainer" for one new Arizona REALTORS® instructor who would benefit from the program.	Done – Steve Urie is the 2021 recipient
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.	Partners decided to defer a live program to 2022 due to COVID and schedule conflicts. A virtual webinar series is anticipated for December 1,2,3

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	
Offer an annual conference for incoming leadership and members who wish to become leaders.	Leadership Conference – October 13-15 (Embassy Suites, Paradise Valley)
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	Done.
Develop and/or partner to provide opportunities to enhance leadership skills and pathway to Leadership.	Based on feedback from local associations the originally planned Leadership Week will be converted to Chair/Vice Chair Orientation sometime in December.

	A breakout session at the leadership conference will focus on Leadership Journey.
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.	Decision made to convert this program to an Education Achievement Program.
Distribute MRES Society information through targeted eblasts, rCRMS/GRI classes and social media channels.	Rollout for the new Education Achievement Program has begun and will continue through the end of the year.
Increase MRES Society membership by 10%.	N/A due to rollout of new program.
Monitor and promote NAR’s Commitment to Excellence program.	Information included in break slides shown during AAR’s education classes. A series of webinars have been held promoting the C2EX program. C2EX ribbons were available at the Success Summit.
Annual survey to MRES members to evaluate membership value.	N/A due to rollout of new program.
Co-host a quarterly annual webinar with the GRI program to provide a special educational webinar week.	1 st quarter featured Brian Copeland 2 nd quarter will feature Monica Neubauer Adorna Carroll webinar scheduled for November 23, 9:00 – 10:00am
Investigate virtual opportunities for MRES members to network with each other.	N/A due to rollout of new program.

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 Note: Majority of classes held to date have been direct to member, however, revenue shares have continued
Maintain a cadre of qualified instructors.	On-going
Offer a Summit and or webinars that addresses property management issues and topics.	Summit date: December 9, 2021 Monthly virtual Property Management Forums have been held with positive feedback. Anticipate reverting back to quarterly Forums in 2022.
Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations.	On-going Currently, 260 members hold the CRPM certification.

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 5 associations (including AAR) offering GRI classes in 2021. 29 classes scheduled to date. Classes through December will be offered live stream direct to member.
Co-host a quarterly webinar week with the MRES Society program to provide a special educational webinar week.	Quarterly webinars will be offered: February 24 th : Brian Copeland 133 Attendees May 19 th : Monica Neubauer Pending:

	Two pending webinars
Maintain and enhance the GRI website as needed.	On-going
Evaluate the program annually.	November meeting agenda
Survey designees to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program.	October
Maintain, monitor, and grow a cadre of qualified instructors.	Sally & Mike Liddicoat have been approved as instructors for GRI Market Essentials & GRI Performance Strategies. One instructor pending audition
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.	On-going - Monthly
Provide a financial scholarship program to members.	\$15,000 dedicated in the budget Scholarships will be awarded monthly. January: 7 scholarships disbursed. February: 24 scholarships disbursed. March: 15 scholarships disbursed. April: 14 scholarships awarded. May: 7 scholarships awarded June: 22 scholarships awarded July: 32 scholarships awarded August: 27 scholarships awarded September: 40 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.	

REALTOR® CONVENTION (Success Summit)

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 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 as well as energizing networking opportunities.	Done August 31-September 1 (following REALTOR Caucus "All-In" Success Summit 320 registered/ (259 paid) 286 attended (28 no-shows and 6 cancels)
Feature national speakers to provide a broad scope in national business practices, trends, and techniques.	Done
Utilize a variety of marketing efforts to inform members of the convention and its value, promote date and location one year in advance.	Done (Social media, eblasts, video messages, postcards, word of mouth)
Provide sessions that assist members in enhancing their business and in understanding the Arizona REALTORS® value proposition and benefits.	Done
Investigate partnership/promotion opportunities with brokerages, builders, and other real estate related organizations.	Information sent to brokers that could be used to promote the event to agents
Investigate and implement, if feasible, virtual delivery option.	Done – not feasible this year due to program format.
Identify facility for 2022-2023 conventions	On hold until 2021 program can be evaluated Staff will be sending RFP's out shortly for 2022 location
Promote convention one year in advance.	In process
Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members.	Done

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.	On-going
Participate in firm and local events when available to promote education programs.	As available
Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics.	REALTOR® Caucus – encourage PBD members to bring up during the Caucus
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.	Recommendation in process to not move forward based on investigation and review of how education class registrations originate.
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 for live streaming
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.	Numerous Zoom and education webinars/workshops attended by staff to date.
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.	