

## 2022 PBD Measurable Objective Update

**From:** Professional and Business Development (PBD) Committee  
**Chair:** Barbara Wilson  
**Staff Liaison:** Barb Freestone  
**Date:** September 2022

**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.**

### Groups Formed

- GRI Oversight Workgroup – Kathy Laswick
- Broker University Workgroup – Serena Jones
- CRPM Advisory Board – Sue Flucke
- Professionalism Certification Task Force – Paula Monthofer
- Annual Summit – Laya Gavin

### BROKER UNIVERSITY

This plan provides for the development, delivery or promotion of education programs/resources designed specifically for brokers and managers to stay informed of emerging legal issues, trends and regulations.

<b>Measurable Objectives</b>	
Offer programs designed to keep brokers educated and updated on issues and trends.	Monthly virtual Broker to Broker Forums Advanced BMC classes
When feasible, offer or promote CRB classes.	CRB: Starting a Real Estate Company, February 8 <sup>th</sup> - CANCELLED
Provide information regarding Arizona REALTORS® education programs and the CRB designation information.	Periodic Information included in the BMQ and GRI broker eblasts.

### 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.

<b>Measurable Objectives</b>	

Partnership opportunities are made available to local associations and firms for live and virtual offerings.	9 courses delivered held to date (live and virtual)
Monitor attendee feedback to update curriculum as needed.	On-going
Maintain a cadre of qualified instructors.	On-going Jim Sexton added to cadre in 2022 Mandy Neat and Susan Nicolson added to the cadre in 2022
Maintain a dedicated instructor page to house course materials.	On-going (Currently being updated)
Provide competitive and affordable registration fees including a discounted registration fee for rCRMS holders.	\$69/\$89-member price (1-day classes) \$89/\$109 non-member price (1-day classes) \$89/\$109-member price for 2-day classes \$109/\$129-non-member price (2-day classes) Certified members receive a \$19 discount
Recognize newly certified members on the Arizona REALTORS® social media and events where appropriate.	On-going - monthly

### **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.

<b>Measurable Objectives</b>	
Engage experienced instructors who meet the AAR Instructor Standards.	On-going Butch Lieber and Derek Anglin added to the 2022 CE schedule
Participate in collaboration with allied entities where feasible.	Partnered with WCR for the 2022 annual Women's Conference July 12
Provide partnership opportunities for direct offerings and revenue share opportunities for live streaming classes for education related classes in the PBD business plan.	All classes offered by AAR will be DTM in 2022 5 REBAC (CRD) classes held to date 18 CE classes held to date

	CRS class cancelled due to low registrations
Maintain an 80% student satisfaction level in all classes offered relating to relevancy, engagement and application.	Success - On-going through student evaluations after each class
Provide course partners with marketing flyers.	On-going
Provide local associations with an annual education catalog.	2022 class list has been sent to local associations along with the Outreach program details.
Deliver an annual program featuring national speakers for changing trends and business practices in the industry.	Trends Summit – planned for early December.
Assist local associations with interpreting new or current ADRE education rules.	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.

<b>Measurable Objectives</b>	
Maintain and update education platform license.	Ongoing - Zoom platform used to deliver virtual classes
Conduct annual review of live streaming platform	Done – Zoom platform is working well. Instructors and staff are comfortable with the Zoom platform Numerous engagement platform tools available through the platform
Curriculum development and delivery resources are available and utilized.	On-going
Produce Contract Conversation videos as needed.	3 videos recorded this year: <ul style="list-style-type: none"> <li>• Solar Addendum</li> <li>• Multiple Offer Addendum</li> <li>• Buyer Broker Agreement</li> </ul>

**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>	
Provide Instructor Development opportunities to adapt to the learner and utilize modern teaching techniques.	IDW held featuring Theresa Barnabei (April) Information shared throughout the year on the Instructor facebook group "Ask Betsy" anything Lunch N Learn held July 25 with Betsy Coyne (technology and Zoom trainer)
Provide opportunities for instructors to network and share teaching strategies, engagement activities and technology tools with each other.	Based on feedback, mastermind sessions will continue through December.  Instructor Forum scheduled for September 29, 1:00 – 4:00 at WeSERV East Valley
Develop and offer incentives for instructors to participate and engage in AAR approved/sponsored activities/programs focused on elevated instructor practices.	Instructors who have participated in AAR IDW's receive priority in scheduling
Provide information to members interested in becoming an ADRE approved instructor.	Workshop held July 14 <sup>th</sup>
Provide training and resources for instructors who utilize Zoom platform to teach AAR's live streaming classes.	On-going – information shared through instructor facebook group as well as monthly Instructor Mastermind sessions
Continue to proactively monitor and share emerging trends in instructor skills which can aid instructors in enhancing their skills.	On-going
Provide one scholarship to the Bob Pike "Train the Trainer" for one Arizona REALTORS® instructor who would benefit from the program.	Susan Nicolson is the 2022 recipient.
Recognize an exceptional instructor through Excellence in Education Award.	Award will be presented at the October Leadership Conference

### **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.	Held a successful conference on March 10, 2022 137 Attended / 11 Vendors  NOTE: Next year the IPC will move back to September timeframe. ASEA will take the lead in 2023

### **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.	October 12-14 (Tucson) Installation Dinner – October 13
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	2022 dates: LTA1 – February 16-17th (live in person) LTA2 April 19th (live in person) LTA3 (virtual) June 1st - Dr. Moore and Ron Phipps were guest speakers re DEI LTA4 (live in person at AAR office) September 20th (9:30 – 2:30) (13 presidents-elect have been participating in each of the sessions)
Develop and/or partner to provide opportunities to enhance leadership skills and pathways to Leadership.	Leadership Conference  New video series: Are You Ready to Lead featuring leaders (past and present) sharing their journey to leadership. Videos will be featured in the Voice and social media.
Provide resources addressing “how to be a leader – where do I start?”	New video series in development featuring leaders sharing their journey into leadership.

**Professionalism Program Outreach**

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>	
Provide a program which recognizes members' life-long learning commitment and educational accomplishments.	Education Achievement Program rolled out this year 32 members recognized.
Utilize a variety of channels to distribute Education Achievement program information.	Series of eblasts Stand up banner recognizing recipients will be featured at all AAR events
Monitor and promote NAR's Commitment to Excellence program through a variety of methods and targets.	On-going. Quarterly facebook ads
Provide opportunities and resources to help new members' journey to success.	StartSmart monthly segments in the Voice – reverting to monthly StartSmart eblasts highlighting AAR educational resources and tools beginning in October
If feasible, provide a virtual new agent training workshop/program.	StartSmart New Agent Training program rolled out this year
Co-host a quarterly annual webinar with the GRI program to provide a special educational webinar week.	February 15: Manage, Measure & Make More Money – Bill Lublin May 17: Mindset Matters - Angie Javier August 16 – Using Brain Based Tactics for Success Webinar November 29 - TBD
Increase awareness of AAR's Professionalism webpage.	<ul style="list-style-type: none"> <li>• On-going through the RISE program /</li> <li>• Professionals...That's Who We Are handout at March meetings</li> <li>• IPC / talking points provided to leadership</li> </ul>
Create marketing strategies for C2EX, Professionalism and new agent programs.	Quarterly C2EX facebook ads

**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>	
Partnership opportunities are available to local associations and firms for live and virtual offerings.	Partnering with NARPM Phoenix-Metro, West Valley Chapters and WeSERV to offer live CRPM classes.  21 classes held to date (includes live and DTM classes)
Maintain a cadre of qualified instructors.	On-going
Offer a Summit and or webinars that addresses property management issues and topics.	December 8th
Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations.	On-going (monthly)

### **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>	
The GRI program is available and accessible to members throughout the state through partnerships and live streaming.	Ongoing through partnership with local associations offering live classes as well as direct delivery to members via Zoom and direct delivery to local association classrooms via Zoom
Co-host a quarterly webinar week with the MRES Society program to provide a special educational webinar week.	February 15: Manage, Measure & Make More Money – Bill Lublin: (112 attendees)  May 17: Mindset Matters Webinar (48 attendees)  August 16: Using Your Brain for Success – D.C. McGuire (62 attendees)  November 29 - TBD
Maintain and enhance the GRI website as needed.	On-going

Evaluate the program annually.	Survey sent to candidates in August.
Survey designees to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program.	Survey sent to graduates in August.
Maintain, monitor and grow a cadre of qualified instructors.	Three instructor auditions held to date. Next audition scheduled for October 6-7
Pre-announce scholarship entry dates to brokers with a reminder of the value of GRI to their agent's success.	2021 workgroup converted these emails to full membership emails with quarterly emails about the program to the brokers
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
Provide a financial scholarship program to members with a portion dedicated to opportunities for new members.	<p>Monthly Scholarship Program entitling applicants to receive up to 2 classes per year.</p> <p>Scholarships awarded in 2022:</p> <p>January: 40  February: 34  March: 44  April: 33  May: 27  June: 27  July: 19  August: 45  September: 36</p>
Increase the awareness of the GRI program to new members.	GRI Facebook ads
Participate in collaboration efforts with CRS to increase awareness of the building blocks from each program.	<p>GRI/CRS videos to be featured in the scholarship eblasts and Communication's new member welcome email #4.</p> <p>CRS videos will be posted on the GRI Facebook group quarterly:</p> <ul style="list-style-type: none"> <li>• March (3/18/2022)</li> <li>• June (6/6/2022)</li> <li>• September (9/16/2022)</li> <li>• December</li> </ul>
Monitor national trends in the GRI programs to keep the Arizona REALTORS® GRI program growing and evolving.	On-going
Compile and monitor student demographics.	Done



### **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 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>	
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.	August 31-September 1 in conjunction with REALTOR® Caucus (Scottsdale Plaza Resort)
Feature national speakers to provide a broad scope in national business practices, trends and techniques.	Simon Bailey, Patrice Washington, Shay Hata, Pat Ermen, Elliot Eisenberg, Karen Liz Albert
Utilize a variety of marketing efforts to inform members of the convention and its value, promote date and location one year in advance.	Eblasts, videos, social media, postcard mailer, marketing toolkit for leadership and AEs
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.	Marketing toolkit provided to brokers / announcement made at July Broker Forum
Investigate and implement, if feasible, virtual delivery option.	
Identify event facilities/dates two years in advance.	Event is moving back to Prescott in 2023 Stand Up 2023 announcement banner will be on display at the Summit and Leadership Conference
Promote convention one year in advance.	2023 date and location announced during 2022 event verbally and via standup banner in lobby.

Develop talking points and distribute to Region Vice Presidents, officers and PBD committee members.	done
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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.

<b>Measurable Objectives</b>	
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
Participate in firm and local events when available to promote education programs.	As requested or available
Work through appropriate committees to influence ADRE to permit continuing education credit for business-skill related topics.	REALTOR Caucus sets direction for AAR's legislative efforts.  ADRE EAC September 7 agenda includes discussion pertaining to CE categories
Develop, if feasible, an education app which could house the education calendar, class evaluations and registration information and how the Reteach site could be incorporated.	2021 determined not to move forward with this
Appropriate technologies and resources are available and utilized to create and retain a state-of-the-art learning environment available to members.	On-going
Appropriate resources are available for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums.	On-going
Identify and monitor student demographics for each of the Arizona	GRI – done CRPM – in process rCRMS – done

REALTORS® education programs and utilize in target marketing efforts.	
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