

Professional and Business Development 2023 Business Plan

From: Professional and Business Development (PBD) Committee
Chair: Kathy Laswick
Staff Liaison: Barb Freestone
Date: September 27, 2023

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The following are programs, products, services, and activities (PPSA's) with Professional and Business Development oversight.

Groups Formed

- GRI Oversight Workgroup – Laura Kovacs
- Broker Workgroup – Laya Gavin
- CRPM Advisory Board – Steve Urie
- Spring Conference (formerly the Annual Summit)- Kim Clifton
- Rookie Resource Task Force (now New Agent Navigation) – Barbara Wilson
- Leadership Journey Task Force – Shauna Huisman
- Industry Partners Conference – Christin Mack

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.

Measurable Objectives	
Offer programs designed to keep brokers educated and updated on issues and trends.	Advanced Broker Management Clinic scheduled for May. Monthly Broker to Broker Forums (attendance range from 70-95) Live Broker Summit on February 9: Feedback was extremely positive. (close to 50 attended). ACTION ITEM: Discuss offering another broker summit later in the year.
When feasible, offer or promote CRB classes.	Partnering with Dynamic Direction in June to promote their virtual CRB class to our brokers. (no Arizona attendees)

	June 5-6 CRB Performance Leadership (Instructor: Zola Szerences) via Zoom \$249 (until May 31 st) \$279 (June 1-4 th) https://dynamicdirections.com/events/crb-performance-leadership-june-2023-zola/
Provide information regarding Arizona REALTORS® education programs and the CRB designation information.	Quarterly digital broker newsletter Stats: March 2023: 46.3% opened (3.4% clicked) November 2022: 45.8% opened (2.7% clicked)

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 made available to local associations and firms for live and virtual offerings.	Available 2 classes held in January (1-live/1-Zoom) 1/24-25 Disclosure & Due Diligence – 34 Attendees 1/31/23 Federal Legal Issues – 32 Attendees 3/7-8/23 Res Contract – 26 Attendees (LIVE) 3/16-17/23 Federal Legal Issues – 44 Attendees 4/18-19/23 Essential Skills – 47 Attendees 5/3-4 Agency – 50 Attendees 5/16 – Federal Legal Issues (WeSERV) – 16 attendees 7/13-14 – Disclosure – 37 Attendees 8/8-11 – Contract – 49 Attendees
Monitor attendee feedback to update curriculum as needed.	On-going. All classes have student evaluation forms
Maintain a cadre of qualified instructors.	On-going
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. Discounted rate available to members who hold the rCRMS certification.
Recognize newly certified members on the Arizona REALTORS® social media and events where appropriate.	Monthly or as needed via social media. 13 members earned certification to date in 2023

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	
Engage experienced instructors who meet the AAR Instructor Standards.	On-going Instructors must be current practitioners with proven skills
Partner with the state Women's Council of REALTORS to offer a Women's Conference	August 25 (WeSERV East Valley)
Participate in collaboration with allied entities where feasible.	Women's Conference – partner with Arizona State WCR (August 25 th) Scottsdale Area Association – partner with Journey to Leadership September 26 th event.
Provide partnership opportunities for direct offerings and revenue share opportunities for live streaming classes for education related classes in the PBD business plan.	Available <u>In process:</u> developing online request form for local associations and NARPM to use to request class scheduling. \$4520 revenue shares back to local associations in 1 st Qtr. 2023 \$5450 revenue shares back to local associations in 2 nd Qtr. 2023
Maintain an 80% student satisfaction level in all classes offered relating to relevancy, engagement, and application.	On-going
Provide course partners with marketing flyers.	Monthly flyers

Deliver an Annual program featuring national speakers for changing trends and business practices in the industry.	Trends Summit – December 15 Phoenix Art Museum
Assist local associations with interpreting new or current ADRE education rules.	May 17 virtual meeting for local association AE or ed director and the Commissioner

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.	Zoom license
Conduct annual review of live streaming platform	On-going
Curriculum development and delivery resources are available and utilized.	On-going
Produce Contract Conversation videos as needed.	

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 critical to the Arizona REALTORS® efforts in providing quality education programs.

Measurable Objectives	
Provide Instructor Development opportunities to adapt to the learner and utilize modern teaching techniques.	IDW's 4/14/23 IDW-Which Way – 14 Attendees (LIVE) September 11, 9:00 – Noon – Teach to Learn (LIVE)

Provide opportunities for instructors to network and share teaching strategies, engagement activities and technology tools with each other.	Bi-Monthly Instructor Mastermind sessions via Zoom February 13 – 7 attendees June 12 11:30 -12:30 August 14, 11:30 – 12:30 November 13, 11:30 – 12:30
Provide information or training for members interested in becoming an ADRE approved instructor.	As needed
Provide training and resources for instructors who utilize Zoom platform to teach AAR’s live streaming classes.	Mastermind sessions and periodic Lunch-N-Learns
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.	Derek Anglin – 2023 recipient
Recognize an exceptional instructor through Excellence in Education Award.	Excellence in Education award - 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	
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.	September 20, 2023, Desert Willow Conference Center. Positive feedback received. Program consisted of speaker, panels and roundtable sessions.

LEADERSHIP TRAINING & DEVELOPMENT

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

ensure a superior consumer experience by building dynamic, inclusive, and safe communities.

Measurable Objectives	
Offer an annual conference for incoming leadership and members who wish to become leaders.	October 18-20, 2023, Wigwam Resort
Offer a leadership development program (LTA) specifically for incoming local association presidents-elect.	LTA1,2,3,4 scheduled. Attendees are presidents-elect. Presidents-elect from each association are attending this year.
Develop and/or partner to provide opportunities to enhance leadership skills and pathways to Leadership.	Task Force report – September agenda item Leadership Journey event – September 26 with Elizabeth Mendenhall
Provide resources addressing “how to be a leader – where do I start?”	Task Force recommendations on September PBD agenda Leadership Journey videos – in process

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.

Measurable Objectives	
Provide a program which recognizes members' education commitment and accomplishments.	Education Achievement Program <i>59 recipients (32 in 2022)</i> https://www.aaronline.com/education-achievement-program/ <i>R.I.S.E. Program:</i> https://www.aaronline.com/r-i-s-e-honor-roll-program/ <ul style="list-style-type: none">• <i>Revamping website to include headshots of recipients.</i>• <i>Increased presence on social media.</i>

	<ul style="list-style-type: none"> • <i>President sends congratulation video message to recipients.</i> <p><i># Recipients</i> <i>January</i> <i>February</i> <i>March</i> <i>April – 4 recipients</i> <i>May</i> <i>June – 2 recipients</i> <i>July – 23 recipients (expanded emails to full membership)</i></p>
Utilize a variety of channels to distribute Education Achievement program information.	Voice issue, eblast to membership, Broker and GRI newsletters, social media
Monitor and promote NAR's Commitment to Excellence and FairHaven programs through a variety of methods and targets.	Quarterly social media ads NAR Broker Challenge May 1-October 1. (80% of agents within the office must have their C2EX endorsement plus the managing broker.
Provide opportunities and resources to help new members' journey to success.	StartSmart Program and Rookie Resources Rookie Resource Task Force – report approved at June meeting – project estimated to be completed by end of year.
Provide a virtual new agent training workshop/program.	StartSmart Program scheduled for May (via Zoom) CANCELLED DUE TO NO REGISTRATIONS RECEIVED Comprehensive survey to brokers targeted for summer.
Increase awareness of AAR's Professionalism webpage.	Broker and GRI newsletters

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	
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<p>Partnership opportunities are available to local associations and firms for live and virtual offerings.</p>	<p>AAR offers via Zoom monthly CRPM classes, WeSERV offers live CRPM classes NARPM East and West Valley offer live CRPM class 1/13/23 Anatomy of the PMA – 46 Attendees 1/19/23 FH for Property Managers – 53 Attendees (LIVE) 2/16/23 PM and NAR COE – 42 Attendees (LIVE NARPM) 2/16/23 What Do You Mean the Tenant is My Client – 48 Attendees 3/10/23 PM and NAR COE – 47 Attendees 3/16/23 Legal Trend and Issues in PM – 46 Attendees (LIVE NARPM) 4/14/23 PM Trust Accounting – 46 Attendees 4/20/23 Case Studies in ARLTA – 54 Attendees (LIVE NARPM) 5/12 Marvelous Muck or Mire in Leases – 45 Attendees 5/18 Do It Right or Get the Heck Out of PM – 43 Attendees 5/31 (WeSERV) Landlords & Tenants Playing Fair – 30 Attendees 6/15 (NARPM) Marvelous Muck or Mire in Leases – 22 Attendees 6/16 Disclosure Fact or Fiction – 48 Attendees 6/20 NARPM Leasing for Single Family Homes – 17 Attendees 8/17 PM Trust Accounting – 44 Attendees</p>
<p>Maintain a cadre of qualified instructors.</p>	<p>On-going Mike Tiers added in 2023 Kate Roth working through process of becoming an instructor</p>
<p>Offer a Summit and/or webinars that address property management issues and topics.</p>	<p>December 2023 2023 Forum dates: July 13, 12:30 – 1:30 August 10, 12:30 - 1:30 September 14, 12:30 – 1:30 October 12: 12:30 – 1:30</p>

	November 9, 12:30 – 1:30 Attendance ranges from 112-145
Announce and maintain a list of members who earned the CRPM certification on Facebook and to local associations.	Social media and notices to local associations January – 2 members earned the CRPM February – 0 members earned the CRPM March – 5 members earned the CRPM April – 1 member earned the CRPM May – 4 members earned the CRPM June – 0 July - 0

REALTOR® INSTITUTE: GRI DESIGNATION

This plan provides for a comprehensive training program for the members 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.	Local association partners. 2023: WeSERV, Scottsdale, Prescott Area, Northern Arizona
Co-host a quarterly webinar with the Education Achievement program to provide a special educational.	December 1 (speaker: Amy Chorew) – topic: Articulating Your Value
Maintain and enhance the GRI website as needed.	AZgri.com – ongoing. WordPress platform for the site will be upgraded to newer version in May 2023
Evaluate the program annually.	Fall surveys and ongoing student evaluations
Survey designees to measure how and what they implemented into their business practice as a result of what they learned in the GRI Program.	Fall 2023
Maintain, monitor, and grow a cadre of qualified instructors.	On-going Additional classes added to two current instructors to date
Pre-announce scholarship entry dates to brokers with a reminder of the value of GRI to their agent's success.	Quarterly eblasts to brokers containing quarterly dates (note: 2022 GRI Workgroup requested monthly broker

	<p>eblasts be discontinued and replaced by monthly membership emails) March open rate: 71%</p>
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.	<p>Social media announcements, notices to local associations, announcements in broker newsletters. New designees get a certificate, pin, press release template and marketing announcement template</p>
Provide a financial scholarship program to members with a portion dedicated to opportunities for new members.	<p>\$15,000 annually \$75 individual scholarships, recipients can receive two scholarships in a year</p> <p>January – 60 scholarships disbursed February – 38 scholarships disbursed March – 32 scholarships disbursed April – 43 scholarships disbursed May – 36 scholarships disbursed June – 14 scholarships disbursed July – 11 scholarships disbursed August – 37 scholarships disbursed</p> <p>Scholarship email stats: 58% of members who opened the scholarship application email have been in the business 10 years or less 19% have been in the business over 20 years</p>
Increase the awareness of the GRI program to new members.	<p>GRI monthly social media ads in 2023 Social ads 2023 Ad Theme: Putting the Pieces Together to Complete Your Real Estate Career</p> <p>Ads posted on FB monthly</p>
Participate in collaboration efforts with CRS to increase awareness of the building blocks from each program.	Inclusion in GRI newsletters, GRI facebook page, new designee congratulation email.
Monitor national trends in the GRI programs to keep the Arizona REALTORS® GRI program growing and evolving.	On-going
Compile and monitor student demographics.	Annually

REALTOR® 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.

Measurable Objectives	
Offer a statewide event 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.	March 29-31, 2023 Prescott Resort March 28 – WCR meetings and CRS class March 29-30 – CE, general session, breakouts March 31 – Regional Caucus & Board of Directors
Feature national speakers to provide a broad scope in national business practices, trends, and techniques.	Ben Kjar – Opening – March 29 th Ben Nemtin – General session – March 30 th
Utilize a variety of marketing efforts to inform members of the event and its value, promote date and location one year in advance.	Eblasts, Voice, social media
Provide sessions that assist members in enhancing their business and in understanding the Arizona REALTORS® value proposition and benefits.	Done
Provide partnership opportunities with affiliated real estate organizations.	Vendor tables offered to allied partners To date, LGBQ+, Arizona REALTORS® EDI Committee and HAREP requested tables.
Investigate and implement, when feasible based on location and schedule, virtual delivery option.	Done
Identify event facilities/dates two years in advance.	2024 dates pending
Promote event one year in advance.	When possible
Develop talking points and distribute to Region Vice Presidents, officers, AEs 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 leads 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.	Done
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.	As appropriate
Appropriate technologies and resources are available and utilized to create and retain a state-of-the-art learning environment available to members.	Done
Appropriate resources are available for staff attendance at the Arizona REALTORS®, NAR and Education-related conferences/forums.	Done
Research and investigate LMS platforms to host our current online business planning course and any future online courses.	Fall
Identify and monitor student demographics for each of the Arizona REALTORS® education programs and utilize in target marketing efforts.	On-going