



2019 Professional Development Key Committee

PDKC Fall Governance

October 1, 2019

3:30-5:00pm

Salem Convention Center

AGENDA

- I. CALL TO ORDER
- II. ANTITRUST AND RECUSALS
- III. APPROVAL OF MEETING MINUTES
 - A. Spring Governance Meeting: Thursday, April 11, 2019.
- IV. SUBCOMMITTEE UPDATES
 - A. Webinar Subcommittee
 - B. GRI Subcommittee
 - C. PBA Subcommittee
- V. NEW BUSINESS
 - A. 2020 Education Calendar Update
 - NAR Designations and Certifications
 - GRI Update
 - Webinars
 - PBA
 - Send local calendars/events
 - B. GRI Instructor Update
 - C. Review Local Partner Agreement
 - D. Review New Education Programs
- VI. PARTNER UPDATES – Committee Liaisons
 - A. RRC Report – Deana Doney
 - B. Women’s Council Report – Lindsey Culver
- VII. CHAIR TRANSITION
- VIII. ADJOURN



OREGON ASSOCIATION OF REALTORS®

OREGON ASSOCIATION OF REALTORS® 2019 PROFESSIONAL DEVELOPMENT KEY COMMITTEE

April 11, 2019
Salem Convention Center

DRAFT MINUTES

I. CALL TO ORDER

The meeting of the Professional Development Committee was called to order by Chair Joni McClintock at 3:30 PM. A quorum was present.

ATTENDANCE

| Committee Present: | Staff Present: |
|-----------------------------|----------------------------------|
| Joni McClintock – Chair | Kayla Lowery, Education Manager |
| Holly Tangeman – Vice Chair | Katie Moore, Education Assistant |
| Paula Brotherton | |
| Jimi Couture | |
| Jennifer Dillard | Absent: |
| Deana Doney | Catherine Fisher |
| Lester Friedman | |
| Anne Bridget Geersten | |
| KayDee Hallert | |
| Sonja Kissinger | |
| Gail Rogers | |
| Kim Arscott | |

II. APPROVAL OF MINUTES

MOTION: Made and seconded.

MOTION APPROVED

III. SUBSOMMITTEE UPDATES

- a. Webinar subcommittee:
 - i. Webinar rubric
 - ii. Email in questions before the webinar starts to boost involvement.
 - iii. Change webinar time to Fridays.

MOTION: Motioned and Moved to Change Webinar times to Friday mornings at 9:30am.

- b. Principal Broker Academy:
 - i. Other states are interested in our academy.
 - ii. Already have a session scheduled and two more on the way.
- c. GRI subcommittee:
 - i. Update all outlines – second round to instructors.
 - ii. Subcommittee to receive all updates

- iii. GRI Graduation recognition:
 1. Press release to local associations
 2. GRI Facebook page
 3. Announcement in E=News
 4. Testimonials
 5. Chamber of Commerce
 6. More Marketing materials to graduates
 7. Photoshoot and press release for all graduates.

IV. EDUCATION UPDATE

- a. Current Projects
 - i. Transaction Coordinator Course is up and running.
 1. Marketing materials to be sent out.
 - ii. LMS: OAR received first check from OnlineEd.
 1. Include Broker Advanced Practices on OAR page.
- b. Education Calendar for 2019
- c. Interact CE
 - i. Include correct answers when taking the classes.
- d. Webinar Topics:
 - i. 608 Webinar
 - ii. Lead based paint disclosures
 1. How to handle it.
 2. Licensed contractor beginning and forms + risk management at the end
 3. Abatement contractors
 4. Ashley Fordham to teach the forms portion.
 - iii. Advertising/marketing compliance.
 - iv. Trademark violation
 - v. How to write an addendum
 - vi. Not often used forms (Notices/addendums/objections)
 - vii. How to finance as a business/REALTOR®
 - viii. Market trends and how to anticipate
 - ix. How to plan for retirement
 - x. How to treat new clients
 1. How to separate from your competitor.

V. CODE OF ETHICS DAY

- a. Code of Ethics by Lee Brown to be offered for the whole state.
MOTION: Get approval for 2020 Code of Ethics Day
MOTIONED AND APPROVED

VI. PARTNER UPDATES

- a. CRS- update was given by member.
- b. WCR- update was given by member.

Next conference call to be made via video call.

III. ADJOURN- the meeting adjourned at 4:58 p.m.

OREGON ASSOCIATION OF REALTORS® - EDUCATION PARTNERSHIP AGREEMENT

This agreement is made the _____ day of _____, _____, between the Oregon Association of REALTORS® and the _____ (local partner) for 2018 courses.

Responsibilities of Oregon Association of REALTORS®:

- **Instructors:** Contract, train, certify, hire, and pay instructor base fees and other required fees as per attached spreadsheet of income and expense projections.
- **GRI Core Courses:** Develop, maintain, and refresh the core GRI courses taught.
- **CE certification:** Apply for and maintain instructor and course continuing education certification with the Real Estate Agency. Issue continuing education credit to participants, when applicable.
- **GRI certification:** Apply for and maintain approval from NAR for GRI course certification. Retain records of GRI progress and process GRI Graduation Applications for graduates.
- **Registration:** Process registration, including associated fees, confirmation letters, and cancellation requests.
- **Financials:** Manage all financial accounting of expenses and revenue associated with the course; including, but not limited to: instructor payment, registration, and local partner payment. After the completion of the course, the local partner will receive a financial breakdown and check from OAR.
- **Marketing:** Promote the course to REALTOR® members throughout the State.

Responsibilities of the Local Partner:

- **Host Course:** Agree to co-host course with a minimum of 15 students. Should the program not reach sufficient enrollment to avoid a financial loss, partners will mutually determine if the program shall be presented or canceled. If it is mutually agreed to run the course at a loss, the local partner will equally share the excess expense.
- **Facility:** Provide facility with A/V, including applicable AM/PM refreshments (affiliate sponsorships encouraged).
- **On-Site:** Provide a staff person as the on-site host responsible for: check-in, attendance monitoring, class admin/instructor support (e.g. assure availability of AV equipment and comfort of room), deliver course materials, proctor tests, and return necessary materials to OAR at course end (e.g. attendance sheet, tests, evaluations, etc.).
- **Print:** Sign-in sheets and evaluations. Instructors are responsible for their own handouts.
- **Marketing:** Promote the course to REALTOR® members throughout your region.

Revenue-sharing:

GRI- \$250 host bonus for 15 students + 20% commission of each student registration fee (past 15 students).

Designations, Certifications, and miscellaneous CE courses - Any net profit, after all expenses, will be shared equally between the local partner and OAR.

Program Cancellation:

It is the responsibility of all parties to actively promote this co-sponsored program. Should the program not reach sufficient enrollment to avoid a financial loss, partners will mutually determine if the program shall be presented or canceled. If it is mutually agreed to run the course at a loss, the local partner will equally share the excess expense.

Early Termination of Agreement:

If the local partner fails to fulfill their obligations under the responsibilities previously enumerated, OAR reserves the right to terminate this agreement.

Local Partner Representative

____/____/____
Date

OAR Representative

____/____/____
Date



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Property Management Education Proposal

Prepared By: Kayla Lowery (OAR) &
Barbara Canaday (Barbara Canaday Real Estate PC)



Oregon Residential Property Management Academy

Project Proposal

OAR is proposing to create 4 day-long (6 hour) classes designed to increase the proficiency of Residential Property Managers in Oregon. Once all 4 classes are taken, members would complete the Property Management Academy. The classes will be designed so they can stand-alone as a single class or be taken together.

- 1) Property Management Policies, Procedures, Reporting and Accounting
- 2) Property Management Advertising, Wait Lists, Lease Ups, Inspections, Move ins & outs
- 3) Property Management Laws, Risk Management, and Handling Court Processes
- 4) Property Types and Associated Management Requirements

Cost

Each class will be sold for \$130 per day-long course or \$500 for a bundle of 4 classes.

Anticipated Timeline

October 2019- Program Approved by Professional Development Key Committee

October 2019 – March 2020- Class development by OAR

April 2020- Program debuted at Spring Convention

May – August 2020- First set of 4 classes facilitated by OAR

Target Audience:

All Property Managers in Oregon

All Principle Brokers who practice Property Management in Oregon

All members and non-members who are interested in managing properties in Oregon

Program Logistics:

Classes will be primarily facilitated in-person located in Salem, OR. Occasionally, OAR will facilitate a live broadcast option for rural or distance learners.

Classes will not be cohort-style and can be registered for independently.

OAR will own exclusive rights to the program and can make changes at any time. Initially, OAR will exclusively use Barbara Canaday as the instructor for the course.



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Finance Workshop Education Proposal

Prepared By: Kayla Lowery (OAR) & Chris Bettis (Fluent Mortgage)

Finance Workshop

Project Proposal

OAR is proposing to create a two-day Finance Workshop designed to increase the proficiency of finance and lending to all Oregon Brokers. There will also be a third day that is optional, and at a much higher level than the first two days. This class will be added to the GRI class catalog and count for 6 CE credits and 6 GRI Core Credits.

1. Day 1: The Foundation- Building Your Team & Buckets of Money
2. Day 2: Lead- Application, End-to-End, Contract Best Practices, Loan vs VA benefit, 3C's (3 leg table), Credit, Income, Assets, Appraisal Waivers, DU/DO & LP, Prelim, UW, CTC (Final Approval), CD, Pre-sign doc review, Do Not Wire, Signing, Funding/Recording, Keys- Post Closing Marketing
3. Day 3: Optional. High level, geared towards Principal Brokers.

Cost

Each two-day workshop will be sold for \$250, and the optional third-day will be sold for an additional \$99.

Anticipated Timeline

October 2019- Class Approved by Professional Development Key Committee

January 2019 – March 2020- Class developed by OAR

April 2020- Class debuted at Spring Convention

May 2020- First class facilitated by OAR

Target Audience:

All Brokers in Oregon, All current or aspiring GRI graduates. All Principal Brokers in Oregon.

Program Logistics:

Classes will be primarily facilitated in-person located in Salem, OR. Occasionally, OAR will facilitate a live broadcast option for rural or distance learners.

Classes will not be cohort-style and can be registered for independently.

OAR will own exclusive rights to the program and can make changes at any time. Initially, OAR will exclusively use Chris Bettis as the instructor for the course.



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REALTOR® Safety Education Proposal

Prepared By: Kayla Lowery (OAR) & Bryan Flannery (Foresight Security)

Online REALTOR® Safety GRI Class

Project Proposal

OAR is proposing to create a 3-hour online GRI REALTOR® Safety Class. This class will be prepared and recorded by Bryan Flannery of Foresight Security. This class will take the place of the in-person REALTOR® Safety course.

1. Hour 1: Why REALTOR® Safety?
2. Hour 2: Pre-Attack Behavior Recognition
3. Hour 3: Violent Attack Response
4. Review and Quiz

Cost

Each class will be sold for \$60.

Anticipated Timeline

October 2019- Class Approved by Professional Development Key Committee

January 2019 – March 2020- Class developed by OAR

April 2020- Class debuted at Spring Convention

May 2020- First class facilitated by OAR

Target Audience:

All Brokers in Oregon, All current or aspiring GRI graduates, All Principal Brokers in Oregon.

Program Logistics:

Classes will be recorded at OnlineEd's recording facility in Portland, OR. The finished material will be uploaded to OAR's online catalog for purchase.

OAR will own exclusive rights to the program and can make changes at any time.

OREGON RRC UPDATE

I want to personally thank you for supporting Oregon RRC over the years. This is a new year with just a few changes in Board Members since some have termed out. Gina Shingler with ERA in the Gresham area has graciously joined us as our Finance Leader. Our Deana Doney will be moving over to the Director of our Networking. Just a bit about the terms for Board Members. Each member can stay in that position for a max of 2 years and in Leadership for a total of 4 years. There are 5 Leadership positions with a lineup of new members to take over and learn when it is their turn along with Network Directors that can stay on as long as they would like. Did you know we can have Affiliated Members as well? What that means is that they do not have to be a Realtor but are affiliated with us in some way such a lender, builder, home inspector etc... They get the benefits of attending classes at member rate and all of our social events.

Returning Members are as Follows:

Tanya Peterson, President. Licensed since 2004 and is with John L. Scott Market Center.
Daniel Bifano, Education Leader. Licensed since 2015 and is with The Venuti Group Inc.
Greg Anderson, Membership Leader, licensed in 2014 and is with Exp Realty.
Sarah Malarkey Johnson, Communications Leader, licensed in 2017 and is with Next Home Realty.

New Member:

Gina Shingler, 2020 Finance Leader, licensed since 2007 and is with ERA Real Estate.

New Director of Networking:

Deana Doney, 2020 Director of Networking, licensed since 1992 and is with Meadows Group.

New Affiliated Member:

Dawn Robbins, Caliber Home Loans.

Education that is coming:

1. Bend Area
2. Beach Area
3. Grants Pass Area

Networking:

We are in need of agents to volunteer to be Network Directors. They must enjoy putting on social events or parties for our membership. There is a small amount of reimbursement to help and they can get lenders or other contractors to help sponsor.

Events:

First networking event coming soon in Portland at an Art Gallery

Communication:

You can email any of the board members at the following:

oregonrrc@oregoncrs - President

education@oregoncrs - Education Leader

membership@oregoncrs - Membership Leader

info@oregoncrs - Communications Leander

finance@oregoncrs - Finance Leader

We also have a very active Facebook page, look for Oregon RRC and like our page. As well as our Instagram page and of course our website.