


Association
Executives
Institute

The logo for the 75th Anniversary of the Association Executives Institute (AEI). It features a large, stylized '75' in orange and yellow, with 'TH' in orange to the right. Below the '5' is a white circle containing the letters 'AEI' in orange.

ANNIVERSARY

MARCH 23-26, 2018
CHARLOTTE, NC

COMPREHENSIVE
BROCHURE



NATIONAL
ASSOCIATION *of*
REALTORS®

Dear Colleagues

When you look at what we have planned for this year's AE Institute, I think you'll be as excited as I am. The 2018 AE Institute Advisory Board is a dedicated group with a passion and commitment to making the program a benefit to you and your members.

We look forward to honoring and celebrating the 75th anniversary of AEI. For 75 years, the National Association of REALTORS® has supported our profession by offering this educational program. Each year, the program improves as we strive to expand our knowledge of the industry and leadership.

This year, we will again host the CEO Program (limited to 125 participants; additional \$325 fee). I am thrilled to announce we will work closely with Jon Gordon during this session. Jon is best known for books and programs such as *The Energy Bus*, *Soup*, and his latest *The Power of Positive Leadership*. You won't want to miss him!

This Institute offers a full educational curriculum that will cover the following topics: advocacy, communication and technology, culture and collaboration, leadership, and MLS. There will be several additional breakout sessions and some exciting keynote speakers to energize and enlighten you.

And finally, you will have ample opportunity to network! Don't miss the main networking event to be held in the NASCAR Hall of Fame! You will even have a chance to race your peers in the simulated cars!

Mark your calendar for Wednesday, December 6, 12:00 p.m. CST. – when online registration opens! Be the first in line.

We look forward to seeing you and celebrating the 75th AEI anniversary in Charlotte!

My best,



Angela Shields, RCE, CAE
Chair, 2018 AE Institute Advisory Board



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Registration Hours

Thursday, March 22	5:30 p.m. - 8:30 p.m.
Friday, March 23	7:30 a.m. - 5:30 p.m.
Saturday, March 24	7:30 a.m. - 4:00 p.m.
Sunday, March 25	8:00 a.m. - 3:00 p.m.

**An information desk will be available Monday, March 26, 8:00 a.m. - 12:00 p.m.*

AE Institute Attire

The 2018 AE Institute attire is business casual. Charlotte in mid-March averages a low temperature around 45 degrees Fahrenheit and a high temperature around 65 degrees Fahrenheit. As in any location, the weather can change at a moment's notice. Be prepared for inclement weather on any given day.

AE Institute Apparel

A commemorative 2018 AE Institute tie or scarf could help keep you comfortable, mark your attendance, and highlight the AE Institute's 75th anniversary. (Each item sells for \$40 if preordered - \$45 if ordered on-site.) Purchases benefit the AE Professional Development Fund, which supports programming for all association executives.

Special Events At-A-Glance

AE Institute Welcome Lounge

Friday, March 23, 4:00 p.m. - 6:00 p.m.

Stop by for some refreshments and information about Charlotte and meet the AE Institute Advisory Board.

Sponsored by: North Carolina REALTORS® and the Charlotte Area Regional Association of REALTORS®, NC

AE Young Professional Network (YPN) Meet Up

Friday, March 23, 6:00 p.m. - 7:30 p.m.

Attend this session and be a part of the AEC's Young Professional Network. Network with other YPNers and share how you can make a difference in your association and the industry.

RCE Apparel Day

Saturday, March 24

Show your RCE pride by donning a piece of RCE wear for the day.

Opening Session

Saturday, March 24, 9:00 a.m. - 10:30 a.m.

The Opening Session is the official kick-off to the 2018 AE Institute. Come and meet the AEI team, and leave exhilarated by a keynote address from Jon Gordon, a best-selling author and speaker who is passionate about developing positive leaders, organizations and teams. His books and talks have inspired readers and audiences around the world. His principles have been put to the test by numerous Fortune 500 companies, professional and college sports teams, school districts, hospitals, and non-profits. He is the author of 17 books including five best-sellers: *The Energy Bus*, *The Carpenter*, *Training Camp*, *You Win in the Locker Room First*, and *The Power of Positive Leadership*. Jon and his tips have been featured on The Today Show, CNN, CNBC, The Golf Channel, Fox and Friends, and in numerous magazines and newspapers. You'll also hear from 2018 NAR President Elizabeth Mendenhall, who'll offer some special remarks.



Board Secretaries Swap Ideas At Their Own Convention

"WHY haven't we done this before?" and "Let's have something like this every year," were common comment around the corridors, as secretaries of real estate boards of the United States and Canada came together at the Knickerbocker Hotel, Chicago, for a four-day conference May 21-24.

Under the joint auspices of the National Association of Real Estate Boards and the Secretaries Council, 76

"information please." She outlined a system that would catalogue information in the correspondence file as well as from books, pamphlets, magazines. Once started it would take only a few hours a week. Some secretaries said they would ask that memorials to past officers be used to start such a library.

4. Reports on all sorts of good board meetings—example: Vincent Bradley told of "brokerage sessions" on productive

state, and nation, now more profoundly important than ever.

Parties? An informal reception and dance—family affairs with the N.A.R. E.B. staff and the Chicago Board hosts. The Secretaries visited National headquarters, Chicago Board headquarters, went on a sightseeing trip. Resolutions? They passed one only, asking, unanimously, for a return engagement next year.

ence speakers? New

Images and excerpts are from the first Secretaries Council of the National Association of Real Estate Boards (now known as the Association Executives Institute) held in Chicago, May of 1940. The councils did not meet from 1942-1945 due to WWII.

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Special Events At-A-Glance

Grab-and-Go Lunch

Saturday, March 24, 12:30 p.m. - 1:00 p.m.

Grab a sandwich and a drink and head to a networking roundtable or workshop, catch up with friends, or explore the city. Take some time to do what you need to get the most out of this Institute.

Networking Roundtables and Workshop Sessions

Saturday, March 24, 12:45 p.m. - 1:45 p.m.

These roundtables and workshops will help you connect with your peers where you'll learn about different experiences and perspectives in the REALTOR® association management world and the real estate industry.

Workshop: What Commercial Members Need from Their Association

Saturday, March 24, 12:45 p.m. - 1:45 p.m.

Tracy Johnson, President & CEO, Commercial Association of REALTORS® Wisconsin; Kendra Yevoli, Executive Director, Commercial Association of REALTORS® New Mexico

Are commercial practitioners underserved in your association? Although they may comprise a small segment of your membership, commercial practitioners need services too. Because commercial real estate professionals' business is so different from their residential counterparts, many AEs aren't sure how to serve them. Hear directly from commercial AEs on how to better understand and manage commercial practitioners' needs and expectations, and thereby grow your membership.

Workshop: Straight from the Horse's Mouth - An Elected Official's Perspective

Saturday, March 24, 12:45 p.m. - 1:45 p.m.

Cady Thomas, Senior Vice President of Government Affairs, North Carolina REALTORS®; Elected Officials (one Republican, one Democrat)

Hear from two elected officials - who happen to be REALTOR® champions - about how associations can get to know them, advocate for industry issues, and become their number one resource for real estate issues. These panelists will share the do's and don'ts of working with them to get the best results for the industry.

Workshop: From Red to Black: Professional Development Revenue Streams

Saturday, March 24, 12:45 p.m. - 1:45 p.m.

Bill Wald, RCE, CAE, Chief Executive Officer, Minneapolis Area Association of REALTORS®, MN; Lacy Schuldt, Education Manager, Minneapolis Area Association of REALTORS®, MN

Does your association struggle for a new direction to produce non-dues revenue? Discover how to create value for all member-types, including top-producing brokers and other associations, while increasing revenue. Explore how establishing and building partnerships, marketing and pricing, and thinking outside the box can help you increase education revenue streams.

Icebreaker Reception - NASCAR Hall of Fame

Saturday, March 24, 5:30 p.m. - 8:30 p.m.

Join your friends and colleagues for this special Institute welcome reception at Charlotte's very own NASCAR Hall of Fame. Come and renew old friendships and create new ones in a unique environment that will entertain and show everyone a glimpse into the racing world.

State Chief Staff Meeting

Saturday, March 24, 1:30 p.m. - 3:00 p.m.

An opportunity for state association chief staff executives to discuss issues and share insights. Attendance is limited to state chief staff only.

AE Institute Apparel Day

Sunday, March 25

Show your AE Institute spirit by sporting your commemorative 2018 AE Institute wear tie or scarf. (Each item sells for \$40 if preordered - \$45 if ordered on-site.) Purchases benefit the AE Professional Development Fund, which supports programming for all association executives.

NAR CEO Breakfast

Sunday, March 25, 8:30 a.m. - 9:30 a.m.

Join NAR CEO Bob Goldberg, for an update on NAR issues. Ask the questions you need answers to in this open forum with your peers and national counterpart.

Special Events At-A-Glance

Grab-and-Go Lunch

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Sunday, March 25, 12:45 p.m. - 1:45 p.m.

These roundtables and workshops will help you connect with your peers where you'll learn about different experiences and perspectives in the REALTOR® association management world and the real estate industry.

Workshop: Leverage Technology to Transform Association Offices for Members

Sunday, March 25, 12:45 p.m. - 1:45 p.m.

Adrienne Ciskey, Labs Manager, Center for REALTOR® Technology Labs; Abigail Creitz, Librarian and Multimedia Content Producer, Information Services, NAR; Chad Curry, Managing Director, Center for REALTOR® Technology

How can you integrate simple technology into your association office to maximize your members' experience when they visit? Let the National Association of REALTORS® Center for REALTOR® Technology and Information Services groups help you transform your association space into a member destination. This workshop includes pop-up demos so you can see, touch, and feel the type of technology-driven experience you can create for members. Start improving your members' association experience and get them, and the consumers they serve, excited about technology.

Workshop: We've Never Done It That Way: Unique Leadership Methods and Tactics

Sunday, March 25, 12:45 p.m. - 1:45 p.m.

Clint Skutchan, RCE, e-PRO, Founder & CEO, TWO WAY C3, Fort Collins, CO

Learn methods and tactics to help your association identify and overcome the "we've always done it that way" mentality. Systematically develop an organizational culture that supports unique approaches, techniques, and ideas. Take away original approaches and resources to help with these efforts.

New AE Networking Reception

Sunday, March 25, 4:15 p.m. - 5:15 p.m.

What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

RPAC Major Investor Reception

Sunday, March 25, 4:30 p.m. - 6:00 p.m.

This special reception is for RPAC major investors.

General Session

Monday, March 26, 9:00 a.m. -10:00 a.m.

The AE Institute Advisory Board is excited to present to you Dr. Rick Rigsby, President and CEO of Rick Rigsby Communications. Through motivational speaking, corporate coaching, books and social media outlets, Rick encourages and empowers audience members to become great people who do great things.

Collaboration Skills for Success (lunch provided)

Monday, March 26, 10:30 a.m. - 3:00 p.m.

Facilitator: Jerry Matthews, Advisor, Windermere, FL

This Ted Talk style session will share the best collaboration practices of REALTOR® associations across the country. Learn how successful associations collaborate with one another to gain the best results for their members.

These classes are an extension of NAR's New AE Orientation sessions and teach you about the basics of REALTOR® association management. While geared toward new AEs, these sessions are open to all Institute attendees.

NRDS and E-Commerce

Saturday, March 24, 11:30 a.m. – 12:30 p.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Finance, NAR

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com, the Action Center, mailing lists, and more. Bring your questions and Chris will supply the answers.

NAR Policy 101

Saturday, March 24, 2:00 p.m. – 3:00 p.m.

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR; Jeremy Green, Policy Consultant, Board Policy & Programs, NAR; Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Board Policy & Programs, NAR

Policy is just one of the many facets of a REALTOR® association executive's job. Is it possible to know everything about policy? Probably not. But with the tools available to you from NAR, you'll be well on your way to managing policy issues at your association. Learn about NAR's policy review process, Code of Ethics training, online resources, and other "need-to-know" information to understand this key component of REALTOR® association management.

NAR Dues Policies and Dues Remittance Procedures

Sunday, March 25, 10:30 a.m. – 11:30 a.m.

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Managing Director, Dues Compliance, NAR

Attend this session and get the answers to your questions about the NAR dues remittance and collection process. Some of the specific topics covered include dues definitions in NAR's Bylaws, local association staff responsibilities with respect to NAR's dues reconciliation and remittance process, Consumer Advertising Campaign assessments, Institute Affiliate member dues, and the NAR delinquency/collection process.

Core Standards 101

Sunday, March 25, 11:45 a.m. – 12:45 p.m.

John Sebree, RCE, CIPS, CEO, Missouri REALTORS®; Donna Stone, RCE, e-PRO, Association Executive, Jefferson City Area Board of REALTORS®, MO

The Core Standards were approved by NAR's Board of Directors in May 2014 and amended in May 2016. The purpose of the standards is to raise the bar for REALTOR® associations and ensure high-quality service for REALTORS®. Attend this class to confirm you're on the right track for 2018 certification, and take away a few tips and tricks to make the certification process run smoothly for you and your association.

I'm a New AE, Now What?

Sunday, March 25, 2:00 p.m. – 3:00 p.m.

Tessa Hultz, RCE, CAE, CIPS, SRES, CEO, Raleigh Regional Association of REALTORS®, NC

The first year on the job can be a series of surprises, combined with the necessity of learning, managing, and navigating a wide range of activities and personalities. And it can be overwhelming, to say the least. Find out what you should look for, common mistakes made the first year, and resources available to you.

New AE Networking Reception

Sunday, March 25, 4:15 p.m. – 5:15 p.m.

What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

Educational and Special Events

Certified Professional Standards Administration

Cost: \$40

Friday, March 23, 8:00 a.m. – 5:00 p.m.

Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, RCE, Director, Training and Policy Resources, Board Policy & Programs, NAR; Patrick Reilly, RCE, Vice President, Member Services, New York State Association of REALTORS®

Attend the Professional Standards Administrator training and learn how to handle the complexities of professional standards administration, such as processing appeals and conducting hearings. You'll also learn about enforcement procedures and other legal ramifications. If you attend the entire day and complete and pass the professional standards exam, you will receive a certificate attesting to the fact you successfully completed the course. See page 21 for full course description.



Meet Your Core Standards Using REALTOR® Party Advocacy

Friday, March 23, 9:00 a.m. – 3:00 p.m.

Every year is a new world in Core Standards. If your membership is under 600 and you have limited staff resources, it can seem even more challenging to meet this requirement each year. Join us as we break down Core Standards and exchange tested ideas from your AE colleagues on how they met the Advocacy category requirement easily, effectively and often with member engagement. Lunch will be provided with special guest speaker.



e-PRO Day 1

Cost: \$75 (includes lunch)

Friday, March 23, 8:30 a.m. – 4:30 p.m.

The new e-PRO® gives you a roadmap to build your association's business and serve the hyper-connected member and consumer of today and tomorrow. Day 1 teaches about the changing market, how to connect with your members, and how to manage your association's online reputation. Upon completion of Day 1, students must complete Day 2 online (for an additional fee) and submit an application fee to earn the e-PRO® certification.



Lifelong learning is a critical element to continued success. The AE Institute Advisory Board and the RCE Certification Advisory Board both bring exciting opportunities for you to achieve that success. You'll earn 25 points toward your RCE Applicant Data Form for attending the Institute and take away practical information, share ideas, meet others interested in the designation with whom you may form a study team, and even have some fun.

RCE Exams

Candidates for the designation can take the exam while attending the AE Institute. Information about exam reservations will be sent to qualified designation candidates.

RCE Exam

Friday, March 23, 8:00 a.m. – 11:45 a.m.

RCE CAE Plus Exam

Friday, March 23, 8:00 a.m. – 9:45 a.m.

RCE Apparel Day

Saturday, March 24

Show your RCE pride by donning a piece of RCE wear for the day.

RCE Overview and ADF Workshop

Monday, March 26, 7:00 a.m. – 8:30 a.m.

Need help filling out the RCE Applicant Data Form (ADF)? Come to this nuts and bolts work session and walk through the ADF. Learn about the RCE designation process, including how to maximize your ADF points.

Educational and Special Events

*CIPS Global Programs for Associations

Cost: \$75

Friday, March 23, 8:30 a.m. – 12:30 p.m.



Foreign home buying is at a record high. Are you helping members attract international clientele? Gain in-depth education on developing and growing global member programs to help your members succeed in the global marketplace. Association staff interested in understanding the value of global programs at their association are welcome to register and attend. This is a required course for the CIPS designation and it earns points toward the RCE designation and Core Standards. To learn more about how to earn the CIPS designation, visit www.nar.realtor/ae_cips.

**Sign up for this class along with "Commercial Membership by Design" and pay only \$125 and receive complimentary lunch.*

CMLS Best Practices

Friday, March 23, 9:00 a.m. – 4:00 p.m.



Provided by the Council of Multiple Listing Services (CMLS), this one day workshop opens with the recently published "Best Practices Survey Report" as an MLS benchmark assessment, and how this data and other best practice documents are shaping improvements in the MLS industry. Take the challenge to adopt the CMLS Best Practices, which now include the latest legal resources, green data best practices, information for partnering with data consumers, and new tools for MLSs to assess and enhance their organizations. This is the deepest dive to date into helping MLSs improve customer satisfaction, educate volunteer leadership, empower employees, and succeed in making the market work.

*Commercial Membership by Design

Cost: \$75

Friday, March 23, 1:00 p.m. – 4:30 p.m.



Did you know that every REALTOR® association has members that are involved in commercial real estate? Learn how to engage your existing commercial membership base, educate your entire membership on key commercial industry statistics and issues, and attract new commercial members through intentional "by design" involvement. NAR's complete array of resources offers practical tools that you can implement immediately.

**Sign up for this class along with "CIPS Global Programs for Associations" and pay only \$125 and receive complimentary lunch.*

RPR® Resources - Game Changing Tools for REALTORS® and Associations

Friday, March 23, 3:00 p.m. – 4:30 p.m.



Karen France, Senior Vice President, Association and MLS Services, RPR®

Elevate your game and learn how RPR's Dashboard equips AEs to be The Voice for Real Estate® through key features including Market Data Tool and Economic Area Reports. We'll show you the unique ways AEs, FPCs and GADs use this exclusive member benefit to get a seat at the table for economic development activities in their communities. We'll also share the game changing tools REALTORS® across the country use to build their business and be more successful.

CEO Program

Cost: \$325 (pre-registration required)

Friday, March 23, 8:00 a.m. – 4:30 p.m.

NOTE: Attendance is limited to the first 125 attendees who have either five years REALTOR® association management experience and/or who hold the RCE or CAE designation.

The AE Institute Advisory Board is pleased to present the CEO Program, facilitated by best-selling author and speaker, Jon Gordon. He and his training/consulting company are passionate about developing positive leaders, organizations and teams. The CEO Program is where you need to be if you want to take your association to the next level.

CEO Program

Cost: \$325 (pre-registration required)

8:00 a.m. - 4:30 p.m.

NOTE: Attendance is limited to the first 125 attendees who have either five years REALTOR® association management experience and/or who hold the RCE or CAE designation.

RCE Exam

8:00 a.m. - 11:45 a.m.

RCE CAE Plus Exam

8:00 a.m. - 9:45 a.m.

Certified Professional Standards Administration

Cost: \$40

8:00 a.m. - 5:00 p.m.

Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, RCE, Director, Training and Policy Resources, Board Policy & Programs, NAR; Patrick Reilly, RCE, Vice President, Member Services, New York State Association of REALTORS®

Meet Your Core Standards Using REALTOR® Party Advocacy (includes lunch)

9:00 a.m. - 3:00 p.m.

e-PRO Day 1

Cost: \$75 (includes lunch)

8:30 a.m. - 4:30 p.m.

CIPS Global Programs for Associations

Cost: \$75

8:30 a.m. - 12:30 p.m.

CMLS Best Practices

9:00 a.m. - 4:00 p.m.

Commercial Membership by Design

Cost: \$75

1:00 p.m. - 4:30 p.m.

RPR® Resources - Game Changing Tools for REALTORS® and Associations

3:00 p.m. - 4:30 p.m.

AE Institute Welcome Lounge

4:00 p.m. - 6:00 p.m.

Sponsored by: North Carolina REALTORS® and the Charlotte Regional REALTOR® Association, NC

AE Young Professional Network (YPN) Meet Up

6:00 p.m. - 7:30 p.m.

AE Institute Programming

The AE Institute Advisory Board structured the AE Institute curriculum around the following six relevant topic areas:



Advocacy



AE Fundamentals



Association Culture & Collaboration



Communications & Technology



Leadership



MLS

These topics pertain to everyone's association, regardless of membership size. Take some time to read through the session descriptions and build an Institute curriculum that's right for you.

Saturday, March 24 – RCE Apparel Day

Opening Session

9:00 a.m. – 10:30 a.m.

The Opening Session is the official kick-off to the 2018 AE Institute. Come and meet the AEI team, and leave exhilarated by a keynote address from Jon Gordon, a best-selling author and speaker who is passionate about developing positive leaders, organizations and teams. You'll also hear from 2018 NAR President Elizabeth Mendenhall, who'll offer some special remarks.

Build Culture and Build Success

11:30 a.m. – 12:30 p.m.

Tricia Thomas, RCE, CEO, Bay East Association of REALTORS®, CA

Learn to define your association culture and identify the components that contribute to highly productive organizations. This session will help you identify both negative and positive cultures, and it will show you how to navigate through both to achieve a strong, sustainable culture. Work through the seven steps to building culture to move your organization towards success.

Engagement Is not a Four Letter Word

11:30 a.m. – 12:30 p.m.

Tracy Weir, Managing Partner, August Partners, LLC, Portland, OR

All too often, AEs are stymied by their members' lack of engagement. It's not for lack of trying. Events, email, and personal outreach can all fall flat. Learn how to engage and excite members about your mission and vision with some of the following: messaging and positioning, focus groups, personas, marketing automation, and member portals. And then watch as members sit up, take notice, and engage in your association.

Your Personal Leadership Brand: Discover It, Build It, Live It

11:30 a.m. – 12:30 p.m.

Kevin McNulty, Founder, Humadyn-Life Skills Institute, Murfreesboro, TN

This dynamic program is all about who you are as a leader. It's a cutting-edge, thought-provoking assessment that essentially asks, "Who are you as a leader and what is your personal leadership brand (PLB)?" After much interactive group exploration of these questions, Soft Skills Coach Kevin McNulty will share how you can create and develop a PLB that will make you more effective and influential amongst your board members, staff, and association membership.

MLS Boot Camp

11:30 a.m. – 12:30 p.m.

Facilitator: Nobu Hata, Director of Member Engagement, Communications Group, NAR

Panelists: Maren Leigh Brisson-Kuester, Broker, Cottingham Chalk Hayes REALTORS®, Charlotte, NC; Caitlin McCrory, MLS Manager, Board Policy & Programs, NAR; Jim Harrison, President and CEO, MLSListings Inc., Sunnyvale, CA

The MLS is at the core of your members' business, and it is being bombarded daily with new technology solutions. With so many new initiatives in a constantly changing landscape, it may seem impossible to keep up. This session will bring you up to speed with practical information from policy and trends to what's new with RESO, and how to partner with members to facilitate change within the echelons of leadership. Stay on top of new initiatives and learn how to best serve your members and embrace the MLS universe.



Program Key



Advocacy



AE Fundamentals



Association Culture & Collaboration



Communications & Technology



Leadership



MLS

Saturday, March 24 – RCE Apparel Day

NRDS and E-Commerce

11:30 a.m. – 12:30 p.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Finance, NAR

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com, the Action Center, mailing lists, and more. Bring your questions and Chris will supply the answers.

Grab-and-Go Lunch

12:15 p.m. – 12:45 p.m.

Grab a sandwich and a drink and head to a networking roundtable or workshop, catch up with friends, or explore the city. Take a little time to do what you need to get the most out of this Institute.

Networking Roundtables and Workshop Sessions

12:45 p.m. – 1:45 p.m.

Share tried and true solutions while learning new ones at these networking roundtables and workshops. These roundtables will help you connect to the REALTOR® association management world and the real estate industry.

Workshop: What Commercial Members Need from Their Association

12:45 p.m. – 1:45 p.m.

Tracy Johnson, President & CEO, Commercial Association of REALTORS® Wisconsin; Kendra Yevoli, Executive Director, Commercial Association of REALTORS® New Mexico



Workshop: Straight from the Horse's Mouth – An Elected Official's Perspective

12:45 p.m. – 1:45 p.m.

Cady Thomas, Senior Vice President of Government Affairs, North Carolina REALTORS®; Elected Officials (one Republican, one Democrat)

Workshop: From Red to Black: Professional Development Revenue Streams

12:45 p.m. – 1:45 p.m.

Bill Wald, RCE, CAE, Chief Executive Officer, Minneapolis Area Association of REALTORS®, MN; Lacy Schuldt, Education Manager, Minneapolis Area Association of REALTORS®, MN



Program Key



Advocacy



AE Fundamentals



Association Culture & Collaboration



Communications & Technology



Leadership



MLS

Beyond the Planning Retreat Bubble: Create Alignment through Collaboration



2:00 p.m. – 3:00 p.m.

Evan Fuchs, ABR, AHWD, CRS, e-PRO, GRI, RENE, RSPS, SFR, SRS, Broker, Trainer, Speaker, Real Success Concepts, Bullhead City, AZ

For associations to succeed, staff and volunteers must work together with a clear purpose, and an understanding of evolving member business needs. Learn how to create alignment among your members and build on existing strengths by implementing a collaborative process that incorporates input from various association stakeholders and exists outside the silo of the annual planning retreat. Plus, receive tools and worksheets so you can get started right away.

Be the Informed, Social and Connected AE



2:00 p.m. – 3:00 p.m.

Andrew Sims, RCE, PSA, CEO, Dayton Area Board of REALTORS®, OH; Mike Valerino, RCE, Chief Operating Officer, Akron Cleveland Association of REALTORS®, OH

The world of organized real estate is constantly changing. New people, new companies, new technologies, and new issues confront REALTOR® associations and their members every day. Discover how to lead your association through it all and stay ahead of the curve by re-thinking how you consume information, brand yourself on social media, and network with other professionals.

No, No, Please not Another Meeting!



2:00 p.m. – 3:00 p.m.

Roger Turcotte, GRI, Owner, Roger Turcotte and Co., LLC, Contoocook, NH

Volunteers and staff waste thousands of hours each year attending meetings that have no purpose and create no meaningful outcome (other than frustrating staff members and irritating dedicated volunteers). This session will provide AEs with the tools necessary to reduce the amount of time that is wasted in meetings, and impart on them the eight keys to training great meeting leaders.

What's Going on With MLS?



2:00 p.m. – 3:00 p.m.

Facilitator: Kevin McQueen, President, T3 MLS, T3 Sixty, San Juan Capistrano, CA

Panelists: Brad Bjelke, CEO, UtahRealEstate.com, Sandy, UT; Sam DeBord, Vice President of Strategic Growth, Coldwell Banker Danforth, Seattle, WA; Shelley Specchio, RCE, e-PRO, CMLX3, CEO, MIBOR REALTOR® Association, Indianapolis, IN

Voice-activated delivery of IDX information, self-service showings, artificial intelligence, and other technologies are changing real estate. It's evolving into a complex and innovative landscape that can be a challenge to manage. This session helps to make sense of the newest MLS trends and initiatives, from policy changes to consolidation, and highlights the strategies and tools brokers want incorporated into the MLS of the future.

NAR Policy 101



2:00 p.m. – 3:00 p.m.

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR; Jeremy Green, Policy Consultant, Board Policy & Programs, NAR; Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Board Policy & Programs, NAR

Policy is just one of the many facets of a REALTOR® association executive's job. Is it possible to know everything about policy? Probably not. But with the tools available to you from NAR, you'll be well on your way to managing policy issues at your association. Learn about NAR's policy review process, Code of Ethics training, online resources, and other "need-to-know" information to understand this key component of REALTOR® association management.

BREAK

3:00 p.m. – 3:30 p.m.

Program Key



Advocacy



AE Fundamentals



Association Culture
& Collaboration



Communications
& Technology



Leadership



MLS

Saturday, March 24 – RCE Apparel Day

Amplify Your Advocacy Success and Meet Vote/Act/Invest Core Standards

3:45 p.m. – 5:00 p.m.

Justin Y. Allen, Senior Strategic Consultant, REAL Strategies, Bountiful, UT; Seth Palmer, Political Communications and Regulatory Affairs Director, North Carolina REALTORS®; Clarke Richardson Wise, Vice President of Government Relations, Mississippi REALTORS®

REALTOR® Party advocacy is as much a member benefit as it is a member business builder, and it demonstrates the value proposition of association membership. REALTOR® Party also highlights how our members and our resources are used in local communities. Learn how to step up your advocacy efforts, meet the NAR Core Standards, and communicate your advocacy successes so everyone (consumers, elected officials, and members) is engaged.

Stay Relevant in the Digital Information Age

3:45 p.m. – 5:00 p.m.

Garry Wise, Founder, The Paperless Agent/Good Life Realty, Austin, TX

You must meet members' ever-evolving needs. Learn how to do that in innovative and unique ways, and on their timeline. Ensuring they remain relevant and see value in the association is a never-ending cycle of determining what, where, and how to meet their needs. Crack that and you'll maintain high association customer satisfaction levels.

So Many Tools, So Little Time – More Tech Tools Your Team Will Love

3:45 p.m. – 5:00 p.m.

Craig Grant, e-PRO, CEO, The Real Estate Technology Institute, Stuart, FL

Every vendor claims their product is the most amazing tool that will slash costs, increase productivity, and solve all of your association's ills. But your team can't chase every shiny new object. Let Craig show you some amazing, cost-effective, easy-to-use tools that will enhance your

communications, marketing, recruitment and retention efforts, and more! Appreciate how members suffer from TMI (too much inbox) and how the increased role of social media, video, and visual can help you better communicate and market to them.

The Power of Synergy – How to Work with Volunteers

3:45 p.m. – 5:00 p.m.

Melanie McLane, ABR, CRB, CRS, e-PRO, GREEN, GRI, RAA, RSPS, SRES, SRS, President, McLane Solutions, Jersey Shore, PA

The AE sets the association culture, which should involve mutual respect and shared goals. Not all volunteers are on board with the association culture. Some volunteers become involved because of personal agendas, whether it is building a resume or trying to "fix the board." The AE is also challenged with drawing members from various specialties into the association, as well as bringing in fresh faces and developing future leadership. Gain tips and techniques you need to interact with your diverse members while still accomplishing association goals.

Icebreaker Reception – NASCAR Hall of Fame

5:30 p.m. – 8:30 p.m.

Join your friends and colleagues for this special Institute welcome reception at Charlotte's very own NASCAR Hall of Fame. Come and renew old friendships and create new ones in a unique environment that will entertain and show everyone a glimpse into the racing world. And help us as we celebrate the 75th anniversary of the AE Institute!



Program Key

A Advocacy

AEF AE Fundamentals

CC Association Culture & Collaboration

CT Communications & Technology

L Leadership

MLS MLS

Sunday, March 25 – AEI Apparel Day

NAR CEO Breakfast

8:30 a.m. – 9:30 a.m.

Join NAR CEO Bob Goldberg, for an update on NAR issues. Ask the questions you need answers to in this open forum with your peers and national counterpart.

What's in Your Garden? Cultivate, Nurture and Grow Your Association's Culture and Environment

10:30 a.m. – 11:30 a.m.

Kevin McNulty, Founder, Humadyn-Life Skills Institute, Murfreesboro, TN

Imagine for a moment that your association is a garden and you are the master gardener. Now imagine that another gardener has unfettered access to your garden. What would they see? "What's in Your Garden?" is a powerful metaphor that helps audiences think about and see their organization from a workplace perspective. Using this powerful metaphor, workplace expert Kevin McNulty will take you through a process to help you cultivate and improve your association's culture and operating environment.

Maximize Your Marketing Budget with Video

10:30 a.m. – 11:30 a.m.

Marki Lemons Ryhal, ABR, ABRM, CIPS, CRS, SRS, Social Media Speaker, Marki Lemons Unlimited Inc., Chicago, IL

By the end of this year, 74% of all online content viewed will be in video form. For only \$5, you can turn one video into photos, podcasts, blogposts, Tweets, Facebook status updates and more. At that price, you can't afford to not be involved. Learn how to leverage video to engage, encourage, and motivate your members to take action.

Leadership... Winning Others Over vs. Winning Over Others

10:30 a.m. – 11:30 a.m.

Edward Hatch, CRS, GRI, President, Ed Hatch Seminars, Inc., Gambrills, MD

Better leadership starts with communication skills that seek to understand and engage those on the team. So, how do you go about winning the cooperation of others in an environment of strongly felt differences? The answer is to understand, master, and implement the principles of influence, persuasion, leadership, and negotiation. Observe how to appropriately respond to each to build consensus and reach agreement.

Use Volunteers to Achieve Advocacy Goals

10:30 a.m. – 11:30 a.m.

David Stark, Public Affairs Director, Bay East Association of REALTORS®, CA; Gay Wilson, Association Executive, Hopkinsville Christian & Todd County Association of REALTORS®, KY

Even a REALTOR® association with a staff of one can have an effective advocacy program. By leveraging your members' sales skills and community contacts, you can show them how being an active REALTOR® Party advocate is good for their business while growing association successes. This session will share successful, real-world advocacy examples in which any size association can participate.

NAR Dues Policies and Dues Remittance Procedures

10:30 a.m. – 11:30 a.m.

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Managing Director, Dues Compliance, NAR

Attend this session and get the answers to your questions about the NAR dues remittance and collection process. Some of the specific topics covered include dues definitions in NAR's Bylaws, local association staff responsibilities with respect to NAR's dues reconciliation and remittance process, Consumer Advertising Campaign assessments, Institute Affiliate member dues, and the NAR delinquency/collection process.

Program Key



Advocacy



AE Fundamentals



Association Culture & Collaboration



Communications & Technology



Leadership



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Collaboration: The By-Product of a Healthy Culture

11:45 a.m. – 12:45 p.m.

Pamela Erman, CRS, GRI, President, Real Estate Guidance Inc., Virginia Beach, VA

It's been said that if you want something to change, get uncomfortable! Healthy collaboration allows for just that. It's the foundation of a power culture that encourages equal amounts of cooperation, creativity and conflict. If you're ready to challenge the status quo and respect others time, talent, and ideas, then join us for this enlightening session. Learn to play to win instead of playing to not lose!



MLS Cybercrime and Cybersecurity Best Practices

11:45 a.m. – 12:45 p.m.

Jessica Edgerton, Associate Counsel, Legal Affairs, NAR

Cybercrime starts with bad actors lying about their intended use for your MLS data and any open door they can find. Stop them before they start by learning some data security best practices. Learn how to spot anything from a simple phishing email to a large-scale attack. And see how a well-crafted license agreement can keep vendors and brokers honest.



Get Inked! How to Earn Media Coverage

11:45 a.m. – 12:45 p.m.

Tracey Gould, M.S., IMC, CPSM, Vice President, Communications and Marketing, North Carolina REALTORS®

In today's media and content-thirsty environment, it's critical to positively represent the REALTOR® brand in the media and elevate the brand perception to consumers. While the REALTOR® brand is nationally represented in the media via NAR's consumer marketing campaigns (think Phil's-osophies), it needs to be reinforced at the local and state level to bolster the image among local consumer markets. While it may seem daunting, earning regular and positive media coverage is 100 percent achievable with an intentional plan. Now, let's get inked!



Core Standards 101

11:45 a.m. – 12:45 a.m.

John Sebree, RCE, CIPS, CEO, Missouri REALTORS®; Donna Stone, RCE, e-PRO, Association Executive, Jefferson City Area Board of REALTORS®, MO

The Core Standards were approved by NAR's Board of Directors in May 2014 and amended in May 2016. The purpose of the standards is to raise the bar for REALTOR® associations and ensure high-quality service for REALTORS®. Attend this class to confirm you're on the right track for 2018 certification, and take away a few tips and tricks to make the certification process run smoothly for you and your association.



Be-YOU-To-A-Full: Authentic Leadership for Life

11:45 a.m. – 12:45 p.m.

Holly Duckworth, CAE, CMP, CEO, Leadership Solutions International, Denver, CO

Each day we brave a new wilderness. We live in interesting times as humans; both seeking approval and trying to rebel from authority. True leadership doesn't require us to change who we are. It requires us to be who we are. This session invites you to "Be - YOU - to a Full". This session shares case studies, research, and examples to inspire your authentic leadership for a dynamic industry.



Grab-and-Go Lunch

12:45 p.m. – 1:15 p.m.

Grab a sandwich and a drink and head to a networking roundtable or workshop, catch up with friends, or explore the city. Take some time to do what you need to get the most out of this Institute.

Networking Roundtables and Workshop Sessions

12:45 p.m. – 1:45 p.m.

These roundtables and workshops will help you connect with your peers where you'll learn about different experiences and perspectives in the REALTOR® association management world and the real estate industry.

Program Key



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Sunday, March 25 – AEI Apparel Day

Workshop: Leverage Technology to Transform Association Offices for Members

12:45 p.m. – 1:45 p.m.

Adrienne Ciskey, Labs Manager, Center for REALTOR® Technology Labs; Abigail Creitz, Librarian and Multimedia Content Producer, Information Services, NAR; Chad Curry, Managing Director, Center for REALTOR® Technology

Workshop: We've Never Done it That Way: Unique Leadership Methods and Tactics

12:45 p.m. – 1:45 p.m.

Clint Skutchan, RCE, e-PRO, Founder & CEO, TWO WAY C3, Fort Collins, CO

Stay Relevant, Meet Core Standards, and Gain Power with the Advocacy Trifecta

2:00 p.m. – 3:00 p.m.

Christine Berger, e-PRO, Vice President, Political Affairs, Minnesota REALTORS®

Learn how The Advocacy Trifecta can help you use members and NAR tools and funds to gain political power, be relevant in policy discussions, and meet the NAR Core Standards. The Advocacy Trifecta is the secret sauce for our REALTOR® recipe for success. REALTOR® associations need to engage in all areas of advocacy to ensure our efforts, values, and members are front and center with elected officials. Let's roll up our sleeves and get moving together. Remember that in politics, if you are not at the table, you are on the menu!

Work Together for a Better Community



2:00 p.m. – 3:00 p.m.

Facilitator: Terri Marshall, Executive Director, Housing Opportunity Foundation, Charlotte Regional REALTOR® Association, NC

Panelists: Laura D. Belcher, President and CEO, Habitat for Humanity Charlotte, NC; Mike Hege, MRE, ABR, AHWD, GRI, GREEN, MRP, e-PRO, CRS, Broker-in-Charge, Pridemore Properties, Huntersville, NC; Julie A Porter, President, Charlotte Mecklenburg Housing Partnership, NC

The Housing Opportunity Foundation, the charitable arm of the Charlotte Regional REALTOR® Association, positions its members as leaders within the area of housing and beyond. Join this session to learn how the foundation orchestrated its largest community service project, REALTORS® Care Day, and engaged numerous community partners and more than 700 REALTOR® volunteers to address critical housing needs in a two-county area.

Trust Based Leadership



2:00 p.m. – 3:00 p.m.

Mark Given, ABR, CRS, GRI, SRES, Founder of The Trust Based Philosophy, Mark Given International, Roanoke Rapids, NC

Now more than ever, the world needs companies, organizations, and people that do the right thing, even when no one is watching (but someone is always watching!). Learn the necessary steps to improve a culture that carefully and concisely inspires the minds, hearts, and souls of your organization. Eliminate debate by creating “fabled service stories” and empower your team members to live out clear expectations that drive members to your door and guarantee results.



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Develop and Launch a REALTOR® Value Campaign



2:00 p.m. – 3:00 p.m.

Facilitator: Mike Caesar, Director of Marketing and Communications, Charlotte Regional REALTOR® Association, NC

Panelists: Kyla Barcus, Director of Communications & Outreach, Kansas City Regional Association of REALTORS® & Heartland Multiple Listing Service, KS; Kevin Juliano, e-PRO, Digital Director, Pennsylvania Association of REALTORS®; Suzanne Westrum, Vice President of Communications and Marketing, San Antonio Board of REALTORS®, TX

A particular section of the NAR Core Standards brings trepidation to almost all who read it: consumer outreach. How do you create an effective consumer outreach campaign within budget? How do you convince leadership that it's worth the cost? Where do you find an effective team to bring it all together? This panel of communications directors will help you get started and show how if you focus on your audience, it will come together.

I'm a New AE, Now What?



2:00 p.m. – 3:00 p.m.

Tessa Hultz, RCE, CAE, CIPS, SRES, CEO, Raleigh Regional Association of REALTORS®, NC

The first year on the job can be a series of surprises, combined with the necessity of learning, managing, and navigating a wide range of activities and personalities. And it can be overwhelming, to say the least. Find out what you should look for, common mistakes made the first year, and resources available to you.



Fundraising – RPAC and Beyond



3:15 p.m. – 4:15 p.m.

Gavin Blair, CEO, Iowa Association of REALTORS®; Nathan Gorton, Government Affairs Director, Washington REALTORS®

This fast-paced, solution-oriented session for new and seasoned AEs will provide some RPAC fundraising basics and help you take your efforts to the next level. Gain a better understanding of how your fundraising can help you get “skin in the game” as well as meet other NAR fundraising requirements. You will leave this session with new ideas and a renewed energy for fundraising.

Distractions, Detractors and Tin Foil Hats – Leveling Up in Culture and Leadership



3:15 p.m. – 4:15 p.m.

Holly Mabery, ABR, GRI, RSPS, SRS, Chief Instigator, Real Chaos Solutions, LLC, Cottonwood, AZ

We can all be one Facebook post away from confusion, chaos, and another possible conspiracy theory. Local and state associations have a unique opportunity right now to reach members where they are and help them rise. The opportunity is deeper than just hosting another CE class or meeting. It's about creating a culture of why we exist and bringing your members into the association fold. Attend Holly's session and learn how to create a series of next steps to implement culture building blocks and bring your members on board.

Own Your Time: Strategies for a Profitable and Balanced Life



3:15 p.m. – 4:15 p.m.

Stephanie Wachman, Executive Coach, Speaker, and Trainer, Life In Balance, LLC, Denver, CO

This interactive and entertaining training is meant for all who struggle with achieving some work/life balance. Identify your personal time-wasters and adopt strategies to eliminate them. Learn techniques to overcome procrastination and organize your work, and even some tips for managing email so it doesn't manage you.

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How MLS Data Moves

3:15 p.m. – 4:15 p.m.



Facilitator: Kipp Cooper, RCE, CEO, Kansas City Regional Association of REALTORS®, KS

Panelists: Bob Bemis, Vice President, Business Development, Realtors Property Resource®; Mitchell Skinner, Managing Attorney, Larson Skinner PLLC, Minneapolis, MN; Michael Wurzer, President & CEO, FBS Creators of Flexmls, Fargo, ND; Jeremy Matthew Crawford, CEO, Real Estate Standards Organization (RESO), Raleigh, NC

Still trying to wrap your head around the required implementation of the RESO Web API? Then this session is for you. Learn where your data goes and how it gets there. Follow the lifecycle of data as it travels throughout the MLS and see all of the invisible forces at play. Learn about permissions, RETS and APIs, the three ways brokers disseminate data, and the role the MLS plays to safeguard the information through licensing.

New AE Networking Reception

4:15 p.m. – 5:15 p.m.

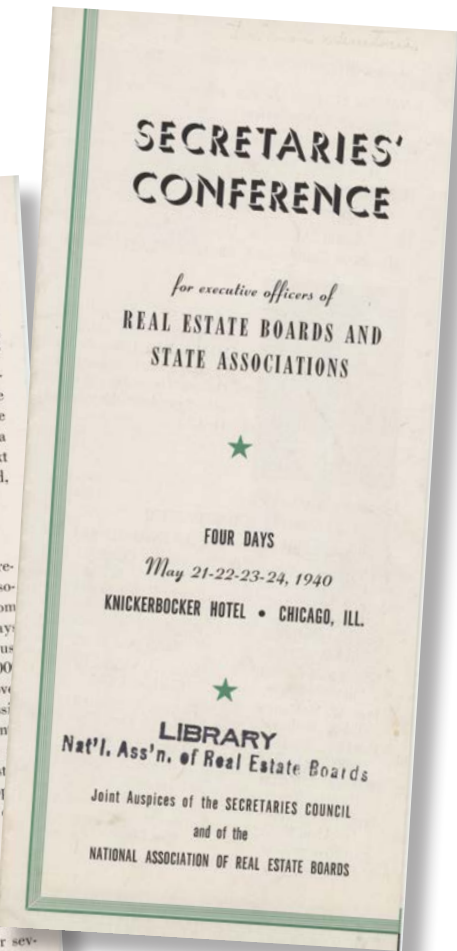
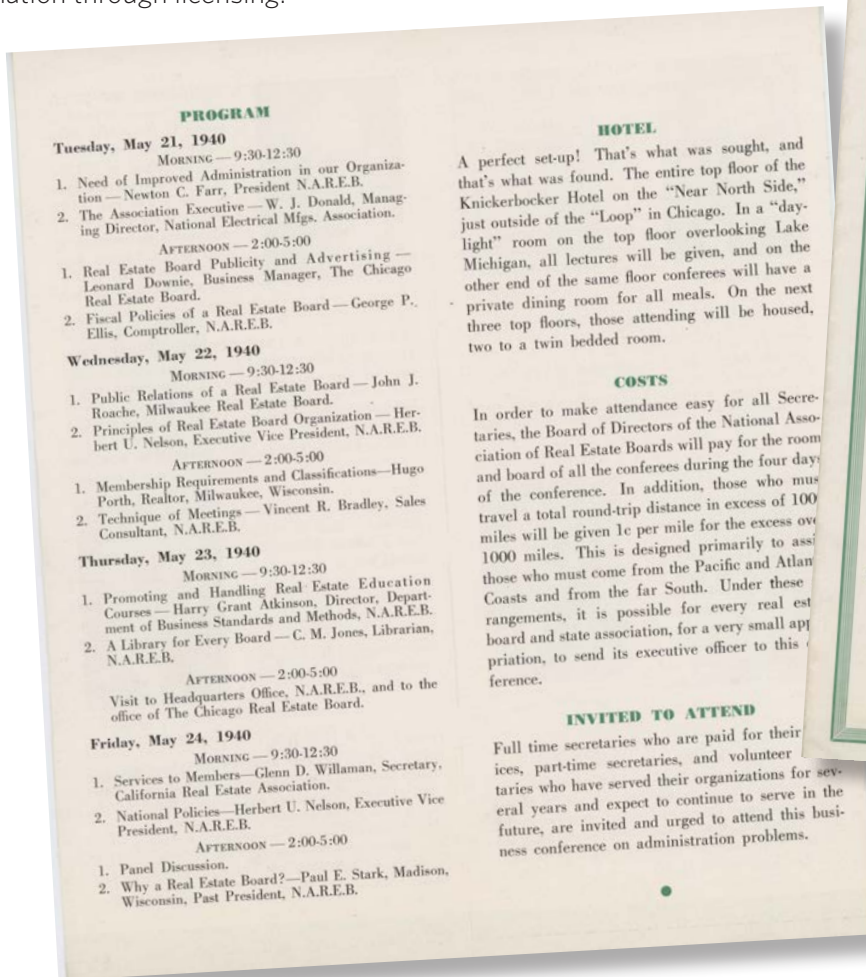


What a great way to build on your relationships with other AEs who are also just starting out in the business and are new to the Institute. Come network with a group whose faces will become familiar to you by the end of the Institute.

RPAC Major Investor Reception

4:30 p.m. – 6:00 p.m.

This special reception is for RPAC major investors.



Program Key



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Continental Breakfast
7:30 a.m. - 9:00 a.m.

RCE Overview and ADF Workshop
7:30 a.m. - 8:30 a.m.

General Session
9:00 a.m. - 10:00 a.m.

The AE Institute Advisory Board is excited to present Dr. Rick Rigsby, President and CEO of Rick Rigsby Communications. Through motivational speaking, corporate coaching, books and social media outlets, Rick encourages and empowers audience members to become great people who do great things.

Collaboration Skills for Success (lunch provided)
10:30 a.m. - 3:00 p.m.

Facilitator: Jerry Matthews, Advisor, Windermere, FL

This Ted Talk style session will share the best collaboration practices of REALTOR® associations across the country. Learn how successful associations collaborate with one another to gain the best results for their members.

CONFERENCE COMMITTEE

CHAIRMAN: *John J. Roache, Chairman of the Secretaries Council*

Newton C. Farr, President, National Association of Real Estate Boards.

Herbert U. Nelson, Exec. Vice President, National Association of Real Estate Boards.

Harry Grant Atkinson, Director, Department of Business Standards & Methods, N.A.R.E.B.



JOHN J. ROACHE

CONFERENCE CHAIRMAN — John J. Roache, as Chairman of the Secretaries Council for 1940, will preside throughout the conference.

NEED OF AN IMPROVED ADMINISTRATION IN OUR ORGANIZATION — Newton C. Farr, President, National Association of Real Estate Boards, has had wide and varied experience in dealing with and directing the affairs of many types of organizations, including local, state and national real estate associations.



NEWTON C. FARR

PUBLIC RELATIONS — John J. Roache, as Executive Secretary of the Milwaukee Real Estate Board, of the Wisconsin Association of Real Estate Brokers, and of the Milwaukee Home Show, has had much experience in dealing with community and state problems as they affected his own board and state association, making him a logical choice to outline the need for sound public relations, and to point out the dangers of ill-considered participation in all public undertakings.

THE ASSOCIATION EXECUTIVE — W. J. Donald, Managing Director, National Electrical Manufacturers Association and author of *Trade Associations*, is an outstanding authority on the duties, responsibilities, and qualifications of trade association executives.



W. J. DONALD

PRINCIPLES OF REAL ESTATE BOARD ORGANIZATION — Herbert U. Nelson, Executive Vice President, National Association of Real Estate Boards, will discuss the duties and prerogatives of officers, executives, committees, and employees in a real estate board. Mr. Nelson also will outline the policies of the National Association and explain their formulation, execution, and results.

HOST COMMITTEE

Composed of all members of the Executive and Advisory Committees of the Secretaries Council.

JOHN J. ROACHE
Milwaukee, Wis.

RICHARD F. HARDING
Salt Lake City, Utah

LOUISE H. PEACOCK
Atlanta, Georgia

PHIL W. McMAHON
Tulsa, Oklahoma

URBAN K. WILDE
Indianapolis, Ind.

WALTER T. MILLIS
Houston, Texas

ARTHUR W. GELSTON
Brooklyn, N. Y.

C. PHILIP PITT
Baltimore, Md.

GLENN D. WILLAMAN
Los Angeles, Cal.

CHARLES J. RUSH
Washington, D. C.

HARRY J. MOHLMAN
Cincinnati, Ohio

EDWARD A. SANDLER
Kansas City, Mo.

CLARENCE C. LANG
St. Louis, Mo.

CHARLES E. LEE
Boston, Mass.

JOHN N. D. GRIFFITH
San Diego, Cal.

PURPOSES OF THE CONFERENCE

Efficiency of administration in a real estate board or a state association of real estate boards often makes the difference between a strong and influential, or a weak and ineffectual organization. Good administration as to finance, public relations, committee work, and procedure is essential if success is to be assured. It can be said that an organization is no better than the manner in which it is administered. Recognizing this fact, the Secretaries Council and the Board of Directors of the National Association have jointly arranged this conference, to be devoted solely to the problems of making a real estate board or a state association a stronger and more smoothly working mechanism.

The conference will be run along the lines of a school—not a convention. Conferees will be asked to attend every session, be on time, and remain throughout the lecture and discussions. Lectures will cover the whole field of real estate organization activity, and in four full days, real estate association executives, whether serving a large or a small membership, will be given training that will prove valuable to the local board or state association for years to come.

Lectures will be compiled in booklet form for distribution to those who attend the sessions. In addition, the National Association will distribute to those in attendance a handbook for secretaries of real estate boards and state associations.

Certified Professional Standards Administration

Friday, March 23, 8:00 a.m. – 5:00 p.m.



Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, RCE, Director, Training and Policy Resources, Board Policy & Programs, NAR; Patrick Reilly, RCE, Vice President, Member Services, New York State Association of REALTORS®

Professional Standards Certificate Requirements

All attendees must attend all day and pass 75% of the comprehensive exam conducted at the end of the program. Those who pass the test are awarded a certificate of completion. The test is distributed at the end of classroom instruction on Friday, March 23. Students complete the exam in class and receive their grade and certificate before leaving. Attendance is worth 10 points on the RCE Applicant Data Form.

History and Introduction

Become familiar with the history and fundamentals of the Code of Ethics. You'll learn the major categories of Articles in the Code, its structures, and supporting materials. Gain a clear understanding of the commonly cited Articles of the Code.

Due Process and the Function of the Grievance Committee

Understand the components of due process. Learn the role of the grievance committee as it relates to ethics complaints and arbitration requests, and the importance of confidentiality in the professional standards process.

The Hearing Process

Learn the steps required for providing a properly formatted hearing. Understand the difference between an ethics hearing and an arbitration proceeding and the practices common to both. Find out how to write an ethics decision and the authorized disciplines.

Article 17 and Arbitration

What constitutes a violation of Article 17? What is the role of legal counsel and staff? Understand the appeal process, directors' actions, procedural reviews, the difference between mandatory and voluntary arbitration, and why mediation is the preferred method of dispute resolution.

Procuring Cause and Policy Resources

Gain a better understanding of procuring cause. Learn about the importance of checklists, timelines, forms, and adoption of the Code of Ethics and Arbitration Manual.

Expediting Professional Standards

Explore the National Association's ethics mediation, ombudsman, and citation policies.

Final Exam (open book)

Don't worry, you'll pass!



Registration Made Easy

Tuition

AE Institute tuition is \$560 and includes attendance at courses and general sessions, Friday's Welcome Lounge, Saturday night's Icebreaker Reception, breakfast Saturday through Monday mornings, lunch Saturday through Monday. Extra fees are required for the CEO Program (\$325), Certified Professional Standards Certification (\$40), CIPS Global Programs for Associations (\$75), Commercial Membership by Design (\$75), and e-PRO courses (\$75).

Note: Tuition increases to \$590 after January 31, 2018.

Hotel Accommodations

Hotel accommodations are available to all attendees at the following hotels:

Sheraton Charlotte Hotel

Standard \$168 single/double

Le Meridien Charlotte

Standard \$190 single/double

The Westin Charlotte

Standard \$190 single/double

Attendees will book their hotel reservations on-line, as they register for the AE Institute. Do not contact these hotels directly to secure hotel accommodations. The only way to book a hotel room at the group rate is via the on-line AE Institute registration process. The deadline to confirm your housing is February 23, 2018.

If you have any questions regarding registration and/or housing, please contact:

Andra Zarins - Housing Manager azarins@realtors.org

Charlotte Wroblewski - Registration Manager
cwroblewski@realtors.org

NAR Discounts Mean Lower Airfares To Charlotte!

United Airlines



To purchase your ticket, visit www.united.com/meetingtravel and enter **ZYYQ512088** in the Offer Code box.

Tickets may also be booked by calling United Meetings Reservations at 800-426-1122 Mon-Fri 8am - 10pm ET and Sat-Sun 8am - 6pm ET. Booking fees are waived for Meetings.

Delta Air Lines



To purchase your ticket, visit www.delta.com/booking and enter your Meeting Event code - **NMQRV** - and continue with the booking process.

Or, you can call Delta Meeting Network® Reservations at 800-328-1111, Monday through Friday, 7:00 a.m.-7:00 p.m. Central Time, and refer to Meeting Code: **NMNUK**.

Time Zone

Eastern time zone

Temperature

Charlotte in mid-March averages a low around 45 degrees Fahrenheit and a high temperature around 65 degrees Fahrenheit. As in any location, the weather can change at a moment's notice. Be prepared for inclement weather on any given day.

QUESTIONS?

Call 800/874-6500.