

Association  
Executives  
Institute



**ANNIVERSARY**

CHARLOTTE, NC • 2018

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*Official Sponsor of the 2018 Association Executives Institute*

FINAL PROGRAM



NATIONAL  
ASSOCIATION of  
REALTORS®





Visit the **NAR Resource Table** for tools and resources to help you communicate the value of membership! **Westin Charlotte Hotel, Grand Ballroom Promenade Foyer, Level 2**

## Stop by to learn about the following programs and resources!



### Fair Housing

Commemorate the 50th anniversary of the signing of the Fair Housing Act, and utilize the Communication Resources available from NAR.



[www.FairHousing.realtor](http://www.FairHousing.realtor)



### Association Resource Packet

Save 10% on REALTOR® Store purchases, including the 2018 Association Resource Packet, which includes 100 copies each of the *Top Benefits of NAR Membership* brochure and the *NAR Education, Publications and REALTOR Benefits® Program Catalog*.



[www.Store.realtor/Resource](http://www.Store.realtor/Resource)



### 2018 Orientation Resources

Access NAR's Orientation Toolkit and learn about the Online Orientation National Module.



[www.NAR.realtor/Orientation](http://www.NAR.realtor/Orientation)



### Member Center

Utilize the NEW AE system for the Member Center to update your Association's content and events so members can see benefits from their National, State and Local Associations.



[MemberCenter.NAR.realtor/Admin](http://MemberCenter.NAR.realtor/Admin)



### REALTOR® Safety

Download safety resources to share with your members, and apply for a 2018 REALTOR® Safety Reimbursement Grant.



[www.NAR.realtor/Safety](http://www.NAR.realtor/Safety)



## Dear Colleagues

It is time to celebrate! On behalf of the AEI Governors, we welcome you to the "Queen City!" This promises to be an exciting week of fun-filled education and networking.

This year we have the unique honor of several special activities. We look forward to celebrating and commemorating the AE Institute's 75th Anniversary. This includes a special venue for our Icebreaker Reception: the NASCAR Hall of Fame! We also look forward to welcoming the National Association of REALTORS® new CEO, Bob Goldberg. It is an exciting time for the organization as we not only reflect on our history, but look at what is to come in the future.

The Governors have worked hard to prepare programming around the following topic areas:

**Advocacy**

**Communication and Technology**

**Culture and Collaboration**

**Leadership**

**MLS**

Please take the time to review this final program and select the sessions that best fit your needs. Each session was carefully developed with all associations and association staff in mind.

Remember to download the AEI app to create your personalized schedule. The app also allows you to participate in the silent auction and stay current with any updates. (Search "2018 NAR AEI" in iTunes or the Google Store to download the app.)

Should you have any questions during the Institute, look for any of the Governors (those wearing the light blue name badges). We are here to make your experience the best it can be!

Again, we are glad you are here! Thank you for taking the time to invest in YOU! And thank you for supporting AEI!

My best,



**Angela Shields, RCE, CAE**

*Dean, 2018 Association Executives Institute*



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# Association Executives Institute Advisory Board



**Rebecca Grossman, RCE**  
 Chair, Association Executives Committee  
 Chief Executive Officer  
 Scottsdale Area Association of REALTORS®



**Mike Barnett, RCE**  
 Vice President/Chief Operating Officer  
 Texas Association of REALTORS®



**Duncan MacKenzie, RCE**  
 Vice Chair, Association Executives Committee  
 Chief Executive Officer  
 New York State Association of REALTORS®



**Matt Consalvo**  
 Chief Executive Officer  
 Arizona Regional MLS



**Angela Shields, RCE, CAE**  
 Chair, AE Institute Advisory Board  
 Chief Executive Officer  
 Tennessee Association of REALTORS®



**Carrie Kendall, RCE**  
 Chief Executive Officer  
 Lafayette Regional Association of  
 REALTORS® (IN)



**Ryan Conrad, RCE, CAE**  
 Vice Chair, AE Institute Advisory Board  
 Chief Executive Officer  
 Northern Virginia Association of REALTORS®



**Karyn Lindsey**  
 Director of Education  
 Charlotte Regional REALTOR®

## NAR Pavilion

**Saturday, March 24 10:30 a.m. – 5:00 p.m.**

**Sunday, March 25 9:30 a.m. – 4:00 p.m.**

Note:  
 REALTOR Benefits® Program Partners in **ORANGE**  
 NAR Strategic Investment Companies in *Italics*

**NAR  
 PAVILION**

Westin Charlotte  
 Grand Ballroom Foyer  
 Level Two

Be sure to visit the NAR Pavilion where you can learn about the latest products and services from the following NAR areas:

- Association Leadership Development (ALD) & Human Resources
- Commercial \*
- Information Services
- NAR Global \*
- NAR Resource (.REALTOR™, Member Center & MVP Program) \*
- RAMCO
- REALTORS® Insurance Marketplace \*
- *realtor.com*®
- Realtors Property Resource® (RPR®) \*
- REALTOR Team Store®
- REALTOR® University \*, REBAC - ABR®
- *SentriLock* \*
- *zipLogix*™

\* Available in Networking Roundtables over lunch





**Kevan Lyons, RCE, e-PRO**  
Chief Executive Officer  
REALTORS® of Central Colorado



**John Sebree, RCE**  
Chief Executive Officer  
Missouri REALTORS®



**Ali Mann, RCE**  
Association Executive  
New York State Commercial Association  
of REALTORS®



**Katie Shotts, RCE**  
Chief Operating Officer  
Pinellas Suncoast Association  
of REALTORS® (FL)



**Roger Nelson**  
Chief Executive Officer  
West Maricopa County Regional  
Association of REALTORS® (AZ)



**Cady Thomas**  
Senior Vice President of Government Affairs  
North Carolina REALTORS®



**Kim Pontius, RCE, CAE**  
Chief Executive Officer  
Traverse Area Association  
of REALTORS® (MI)



**Rachel Tristano, RCE, CAE**  
Chief Executive Officer  
Plymouth & South Shore Association  
of REALTORS® (MA)

## Registration Hours

### Westin Charlotte | Stonewall Boardroom Foyer, Level Two

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. – 5:00 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.*

## 2018 AE Institute App

The 2018 AEI App can be found in the iTunes and Google Store. Be sure to download the app and stay informed on session descriptions, speaker information, sponsors, and more. Use the interactive map feature to see exactly where your favorite sessions will take place. New this year! Message speakers and fellow attendees within the app. Use the app to view and bid on silent auction items as well.



#2018AEI75



[www.facebook.com/naraeinstitute](http://www.facebook.com/naraeinstitute)

# Congratulations 2017 RCEs!

**Donna Andrews, RCE**

Greater Providence Association of REALTORS®, RI

**Eric Berman, RCE**

Massachusetts Association of REALTORS®

**Andrea Booker, RCE**

Montcalm County Association of REALTORS®, MI

**Maria Brogan, RCE**

The Northeast Association of REALTORS®, MA

**Debra Brynoff, RCE**

Grand County Board of REALTORS®, CO

**Alice Clark, RCE**

Northeast Louisiana Association of REALTORS®

**Jessica Coates, RCE**

Birmingham Area Association of REALTORS®, AL

**Neil Collins, RCE**

Santa Clara County Association of REALTORS®, CA

**Andrew Cooper, RCE**

Arcadia Association of REALTORS®, CA

**Kent Cravens, RCE**

Greater Albuquerque Association of REALTORS®, NM

**Amanda Creel, RCE**

Prescott Area Association of REALTORS®, AZ

**Adam Davis, RCE**

Missouri REALTORS®

**Tina Dorward, RCE**

Ozaukee REALTORS® Association, WI

**Marisol Espinoza, RCE**

East Polk County Association of REALTORS®, FL

**Cynthia Fauth, RCE**

National Association of REALTORS®, IL

**Robert Gleason, RCE**

Greater Fort Worth Association of REALTORS®, TX

**Nicole Hagood, RCE**

New Smyrna Beach Board of REALTORS®, FL

**Sarah Hogan, RCE**

National Association of REALTORS®, IL

**Susan Holliday, RCE**

REALTOR® Association of Acadian, LA

**Lyle Irish, RCE**

Knoxville Association of REALTORS®, TN

**Laura Izzo, RCE**

Greater Tampa REALTORS®, FL

**Carlton Jackson, RCE**

Iowa City Area Association of REALTORS®, IA

**Edward Jekel, RCE**

Mohawk Valley Association of REALTORS®, NY

**Aubrie Kobernus, RCE**

REALTORS® Land Institute, IL

**Adam Majorie, RCE**

Collin County Association of REALTORS®, TX

**Josh McFall, RCE**

CAE, Huntsville Area Association of REALTORS®, AL

**Andrea Pennington, RCE**

Texas Association of REALTORS®

**John Petrack, RCE**

REALTORS® Association of Metropolitan Pittsburgh, PA

**Krista Pleiser, RCE**

Santa Barbara Association of REALTORS®, CA

**Jennifer Roche, RCE**

Knoxville Area Association of REALTORS®, TN

**Sonia Sanato, RCE**

Phoenix Association of REALTORS®, AZ

**Evelyn Schultz, RCE**

Conejo Simi Moorpark Association of REALTORS®, CA

**Kristyne Shelton, RCE**

Aiken Board of REALTORS®, SC

**Katie Shotts, RCE**

Pinellas Suncoast Association of REALTORS®, FL

**Suzanne Silva, RCE**

Greater Providence Board of REALTORS®, RI

**Andrew Sims, RCE**

Dayton Area Board of REALTORS®, OH

**Karen Swanbeck, RCE**

Royal Palm Coast REALTORS® Association, FL

**Richard Throop, RCE**

Corpus Christi Association of REALTORS®, TX

**Vani Ungapen, RCE**

National Association of REALTORS®, IL



# Special Events At-A-Glance

## AE Institute Welcome Lounge

**Friday, March 23, 4:00 p.m. – 6:00 p.m.**

Westin Charlotte | Grand Ballroom CD, Level Two

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

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

## AE Young Professional Network (YPN) Meet Up

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

Valhalla Pub & Eatery | 317 S. Church Street

Be a part of the AEC's Young Professional AE Network. Contribute to RPAC and help the AE YPN Advisory Board achieve its goal to raise RPAC awareness! Network with other YPNers and share how you can make a difference.

## RCE Apparel Day

**Saturday, March 24**

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

## New AE Networking Breakfast

**Saturday, March 24, 7:45 a.m. – 8:45 a.m.**

Sheraton Charlotte | Mecklenburg Ballroom 3, First Floor

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 who will become a source of inspiration and ideas throughout your AE career.

## Continental Breakfast

**Saturday, March 24, 8:00 a.m. – 9:00 a.m.**

Sheraton Charlotte | Symphony Ballroom Foyer, First Floor

*Sponsored by: SEI/NAVICA MLS*

## Opening Session

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

Sheraton Charlotte | Symphony Ballroom, First Floor

This session is the official kick-off to the 2018 AE Institute. The keynote address from Jon Gordon, a best-selling author and speaker who is passionate about developing positive leaders, organizations and teams, will leave you exhilarated. His principles have been used by Fortune 500 companies, professional and college sports teams, schools, hospitals, and non-profits. 2018 NAR President Elizabeth Mendenhall will also offer some special remarks.

*Sponsored by: realtor.com®*

## Grab-and-Go Lunch

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

Westin Charlotte | Grand Ballroom Foyer, Level Two

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.

*Sponsored by: MMSI*

## NAR Dues Forum

**Saturday, March 24, 12:45 p.m. – 1:45 p.m.**

Westin Charlotte | Grand Ballroom C, Level Two

*Panelists: Elizabeth Mendenhall, President, NAR; John Smaby, President-Elect, NAR; Tom Riley, Treasurer, NAR; Bob Goldberg, CEO, NAR; Bill Malkasian, SVP, Chief Advocacy Officer, NAR; Laura Crowther, RCE, CEO, Coastal Carolinas Association of REALTORS®, SC; Bill Martin, RCE, CEO, Florida Association of REALTORS®; John Sebree, RCE, Missouri REALTORS®*

Hear first-hand from NAR leaders how they're leading the organization forward and how new initiatives will be funded. This is your chance to have your questions answered so you can take this information back to your members and help them be more informed when it's time to vote on these proposed changes.

*Note: This program will be repeated on Sunday from 1:00 p.m. - 2:00 p.m.*

## Networking Roundtables

**Saturday, March 24, 12:45 p.m. – 1:45 p.m.**

Westin Charlotte | Grand Ballroom AB, Level Two

Take some time to share tried and true solutions. These roundtables will help you connect with your peers and exchange different experiences and perspectives in the REALTOR® association management world and the real estate industry.

## AEI Charity Project - A Child's Place

**Saturday, March 24, 12:45 p.m. – 1:45 p.m.**

Westin Charlotte | Uptown Ballroom, Lobby Level

The AE Institute is partnering with a local organization, A Child's Place, whose mission is to eradicate the impact of homelessness on a child's education. A Child's Place serves more than 4,000 homeless students in the Charlotte/Mecklenburg, North Carolina area. During the lunch hour on Saturday and Sunday, join us to create personalized notes and bookmarks, and assemble treat and hygiene bags that will be donated to A Child's Place.

## Workshop: What Commercial Members Need from Their Association

**Saturday, March 24, 12:45 p.m. – 1:45 p.m.**

Westin Charlotte | Providence Ballroom II, Lobby Level

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

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.

# Special Events At-A-Glance

## **Workshop: From Red to Black: Professional Development Revenue Streams**

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

Westin Charlotte | Providence Ballroom III, Lobby Level

*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, appraisers, and commercial members, 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**

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

NASCAR Hall of Fame

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.

*Sponsored by: SUPRA*

## **State Chief Staff Meeting**

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

Westin Charlotte | Providence Ballroom I, Lobby Level

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

## **AE Institute Throwback Apparel Day**

**Sunday, March 25**

Show your AE Institute spirit and pay tribute to AE Institutes past with this AE Institute "Throwback" Apparel Day! Don your favorite piece of AEI wear from a past Institute, or sport this year's commemorative tie or scarf. A limited number of ties and scarves are available for purchase (\$45/each). Purchases benefit the AE Professional Development Fund, which supports programming for all association executives.

## **New Day Dawning: NAR in 2018 and Beyond; Breakfast with NAR CEO Bob Goldberg**

**Sunday, March 25**

**Breakfast 8:00 a.m. - 8:30 a.m.**

**Program 8:30 a.m. - 9:30 a.m.**

Sheraton Charlotte | Symphony Ballroom, First Floor

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.

*Sponsored by: NAR Office of the CEO*

## **Grab-and-Go Lunch**

**Sunday, March 25, 12:45 p.m. - 1:15 p.m.**

Westin Charlotte | Grand Ballroom Foyer, Level Two

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.

*Sponsored by: Rapattoni*

## **NAR Dues Forum**

**Sunday, March 25, 1:00 p.m. - 2:00 p.m.**

Westin Charlotte | Grand Ballroom C, Level Two

*Panelists: Elizabeth Mendenhall, President, NAR; John Smaby, President-Elect, NAR; Tom Riley, Treasurer, NAR; Bob Goldberg, CEO, NAR; Bill Malkasian, SVP, Chief Advocacy Officer, NAR; Laura Crowther, RCE, CEO, Coastal Carolinas Association of REALTORS®, SC; Bill Martin, RCE, CEO, Florida Association of REALTORS®; John Sebree, RCE, Missouri REALTORS®*

Hear first-hand from NAR leaders how they're leading the organization forward and how new initiatives will be funded. This is your chance to have your questions answered so you can take this information back to your members and help them be more informed when it's time to vote on these proposed changes.

## **Networking Roundtables**

**Sunday, March 25, 1:00 p.m. - 2:00 p.m.**

Westin Charlotte | Grand Ballroom AB, Level Two

Take some time to share tried and true solutions. These roundtables will help you connect with your peers and exchange different experiences and perspectives in the REALTOR® association management world and the real estate industry.

## **AEI Charity Project - A Child's Place**

**Sunday, March 25, 1:00 p.m. - 2:00 p.m.**

Westin Charlotte | Uptown Ballroom, Lobby Level

The AE Institute is partnering with a local organization, A Child's Place, which serves more than 4,000 homeless students in the Charlotte/Mecklenburg, North Carolina area. Join us to create personalized notes and bookmarks, and assemble treat and hygiene bags that will be donated to A Child's Place.

## **Workshop: Leverage Technology to Transform Association Offices for Members**

**Sunday, March 25, 1:00 p.m. - 2:00 p.m.**

Westin Charlotte | Providence Ballroom I, Lobby Level

*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, and see some of this technology in action with an onsite demonstration.



# Special Events At-A-Glance

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

**Sunday, March 25, 1:00 p.m. - 2:00 p.m.**

Westin Charlotte | Providence Ballroom III, Lobby Level  
*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.

## **RPAC Major Investor Reception**

**Sunday, March 25, 4:30 p.m. - 5:30 p.m.**

Westin Charlotte | JP Charlotte, Lobby Level

This special reception is for RPAC major investors.

## **General Session**

**Monday, March 26, 8:30 a.m. - 10:00 a.m.**

Westin Charlotte | Grand Ballroom, Level Two

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. Before Dr. Rigsby gets underway, we'll take some time to honor the 2017 RCE designees.

## **Collaboration Skills for Success**

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

**(lunch provided)**

Westin Charlotte | Grand Ballroom, Level Two

*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.

*Buffet lunch sponsored by CCIM.*



RCE

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.



@AEI

## **RCE Exams**

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

## **RCE Exam**

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

Westin Charlotte | Trade Room, Level Two

## **RCE CAE Plus Exam**

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

Westin Charlotte | Sharon Room, Level Two

## **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. - 8:00 a.m.**

Westin Charlotte | Providence Ballroom II, Lobby Level

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.

# AE Fundamentals Sessions



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.

## New AE Networking Breakfast

**Saturday, March 24, 7:45 a.m. - 8:45 a.m.**

Sheraton Charlotte | Mecklenburg Ballroom 3, First Floor

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 who will become a source of inspiration and ideas throughout your AE career.

## NRDS and E-Commerce

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

Westin Charlotte | Providence Ballroom II, Lobby Level

*Chris DeRosa, RCE, CAE, IOM, Managing Director Financial Info Systems, 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.**

Westin Charlotte | Providence Ballroom II, Lobby Level

*Rodney Gansho, RCE, Managing Director, Member Association and MLS Governance, NAR; Jeremy Green, Policy Consultant, Association and MLS Governance, NAR; Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Association and MLS Governance, 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.**

Westin Charlotte | Providence Ballroom II, Lobby Level

*John Pierpoint, CFO, SVP Finance & Buildings, 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.**

Westin Charlotte | Providence Ballroom II, Lobby Level

*John Seabee, 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 ensure 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, 2:15 p.m. - 3:15 p.m.**

Westin Charlotte | Providence Ballroom II, Lobby Level

*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.



# Pre-Institute Events

## CEO Program Featuring Jon Gordon (SOLD OUT)

**8:00 a.m. – 4:30 p.m.**

Sheraton Charlotte | Mecklenburg Ballroom, First Floor

The CEO Program, presented by best-selling author and speaker, Jon Gordon, will focus on developing positive leaders, organizations, and teams.

## Certified Professional Standards Administration – (\$40)

**8:00 a.m. – 5:00 p.m.**

Sheraton Charlotte | Carolina Ballroom AC, First Floor

*Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®; Diane Mosley, RCE, Director, Training and Policy Resources, Association and MLS Governance, 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 X for full course description.



## e-PRO Day 1 (\$75 – includes lunch)

**8:30 a.m. – 4:30 p.m.**

Westin Charlotte | Providence Ballroom I, Lobby Level

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.



## CIPS Global Programs for Associations\* – (\$75)

**8:30 a.m. – 12:30 p.m.**

Westin Charlotte | Providence Ballroom II, Lobby Level

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](http://www.nar.realtor/ae_cips)



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

## Meet Your Core Standards Using REALTOR® Party Advocacy

**9:00 a.m. – 3:00 p.m.**

Westin Charlotte | Grand Ballroom AB, Level Two

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.



## CMLS Best Practices

**9:00 a.m. – 4:00 p.m.**

Westin Charlotte | Providence Ballroom III, Lobby Level

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.



## AEI Silent Auction

**Westin Charlotte**

**Grand Ballroom Foyer, Level Two**

Be sure to stop by the AEI Silent Auction and bid on some of the great prizes, including a variety of giftcards, smart home items, and a REBAC course licensing agreement. Proceeds from the silent auction benefit both the REALTORS® Relief Fund and the AE Professional Development Fund, which supports education and professional development for all AEs across the country. Follow along and bid on your favorite items with the 2018 AEI App. The silent auction closes at 4:00 p.m. on Sunday, March 25.

# Pre-Institute Events

## Commercial Membership by Design\* - (\$75)



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

Westin Charlotte | Providence Ballroom II, Lobby Level  
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.*

## Elevate Your RPAC Fundraising with the Online Fundraising Program

**2:00 p.m. - 2:45 p.m.**

**3:00 p.m. - 3:45 p.m.** (Repeat of 2:00 session)

Westin Charlotte | Trade Room, Level Two

New to your association or looking for a way to increase your RPAC participation and investments? The Online Fundraising Program is a great, free resource to state and local associations. The online tools are available to you through the PAC Management System and can work in conjunction with your other RPAC fundraising activities. Come learn more and see how easy it is to get started!

## Realtors Property Resource® — Game Changing Tools for REALTORS® and Associations



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

Westin Charlotte | Harris Room, Level Two

*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.

## AE Institute Welcome Lounge

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

Westin Charlotte | Grand Ballroom CD, Level Two

*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.**

Valhalla Pub & Eatery | 317 S. Church Street

## Association Investment Program (AIP)

The Association Investment Program was developed and negotiated by the National Association of REALTORS® to help state and local associations manage their investment reserves. Through your relationship with NAR, your organization can access investment management services which include investment policy development or review, varying portfolio allocations with different risks and returns, and appropriate investment vehicles, all under a pre-negotiated fee. While you’re here in Charlotte, drop in and meet with an advisor or schedule a one-on-one consultation.

### AIP/One-on-One Sessions

**Saturday, March 24**

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

Westin Charlotte  
Park Room, Level Two

### AIP/Investment Process and Strategy

**Sunday, March 25**

**10:30 a.m. - 11:30 a.m.**

Westin Charlotte  
Park Room, Level Two

### AIP/One-on-One Sessions

**Sunday, March 25**

**11:30 a.m. - 2:00 p.m.**

Westin Charlotte Z  
Park Room, Level Two



# Daily Schedule

Saturday, March 24 – RCE Apparel Day

## 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.

### New AE Networking Breakfast

**7:45 a.m. – 8:45 a.m.** | Sheraton Charlotte | Mecklenburg Ballroom 3, First Floor

### Continental Breakfast

**8:00 a.m. – 9:00 a.m.** | Sheraton Charlotte | Symphony Ballroom Foyer, First Floor

*Sponsored by: SEI/NAVICA MLS*

### Opening Session

**9:00 a.m. – 10:30 a.m.** | Sheraton Charlotte | Symphony Ballroom, First Floor

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.

*Sponsored by: realtor.com®*

### Build Culture and Build Success

**11:30 a.m. – 12:30 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two

*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.** | Westin Charlotte | Grand Ballroom C, Level Two

*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.** | Westin Charlotte | Grand Ballroom AB, Level Two

*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 membership.



#### Program Key



Advocacy



Association Culture & Collaboration



Leadership



AE Fundamentals



Communications & Technology



MLS

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# HELP YOUR MEMBERS MAKE MORE MONEY!

---



**Enhance the success of your membership.**

Your members already have access to the valuable NAR Transaction Management Benefit, so why not ensure they're taking full advantage of this great time-saving tool?

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**zipLogix™**



NATIONAL  
ASSOCIATION of  
REALTORS®



75  
YEARS

OF SUPPORTING OUR PROFESSION

1940

CHICAGO

1941

CHICAGO

1946

CHICAGO

John J. Roache

Wisconsin Association of Real Estate Brokers and Milwaukee Real Estate Board

1947

CHICAGO

A.R. Saunders

Michigan Real Estate Association

1948

CHICAGO

A.R. Saunders

Michigan Real Estate Association

1949

CHICAGO

Ray Hofford

Massachusetts Real Estate Association and Boston Real Estate Board

1950

CHICAGO

Ray Hofford

Massachusetts Real Estate Association and Boston Real Estate Board

1951

CHICAGO

Wesley P. Stevens

New Jersey Association of Real Estate Boards

# Daily Schedule

Saturday, March 24 - RCE Apparel Day

## MLS Boot Camp

MLS

**11:30 a.m. - 12:30 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

*Facilitator: Nobu Hata, Director of Member Engagement, Member Experience Group, NAR*

*Panelists: Maren Leigh Brisson-Kuester, Broker, Cottingham Chalk Hayes REALTORS®, Charlotte, NC; Caitlin McCrory, MLS Manager, Association and MLS Governance, 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.

## NRDS and E-Commerce

AEF

**11:30 a.m. - 12:30 p.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

*Chris DeRosa, RCE, CAE, IOM, Managing Director Financial Info Systems, 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

**12:30 p.m. - 1:00 p.m.** | Westin Charlotte | Grand Ballroom Foyer, Level Two

Grab a sandwich and a drink and head to a networking roundtable or workshop, drop in on the NAR Dues Forum, or help with the charity project (A Child's Place).

*Sponsored by: MMSI*

## NAR Dues Forum

**12:45 p.m. - 1:45 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

*Panelists: Elizabeth Mendenhall, President, NAR; John Smaby, President-Elect, NAR; Tom Riley, Treasurer, NAR; Bob Goldberg, CEO, NAR; Bill Malkasian, SVP, Chief Advocacy Officer, NAR; Laura Crowther, RCE, CEO, Coastal Carolinas Association of REALTORS®, SC; Bill Martin, RCE, CEO, Florida Association of REALTORS®; John Sebree, RCE, Missouri REALTORS®*

Hear first-hand from NAR leaders how they're leading the organization forward and how new initiatives will be funded. This is your chance to have your questions answered so you can take this information back to your members and help them be more informed when it's time to vote on these proposed changes.

*Note: This forum will be repeated on Sunday from 1:00 p.m. - 2:00 p.m. in the Westin, Grand Ballroom C.*

## Networking Roundtables

**12:45 p.m. - 1:45 p.m.** Westin Charlotte | Grand Ballroom AB, Level Two

Take some time to share tried and true solutions. These roundtables will help you connect with your peers and exchange different experiences and perspectives in the REALTOR® association management world and the real estate industry.

## AEI Charity Project - A Child's Place

**12:45 p.m. - 1:45 p.m.** | Westin Charlotte | Uptown Ballroom, Lobby Level

### Program Key



Advocacy



Association Culture & Collaboration



Leadership



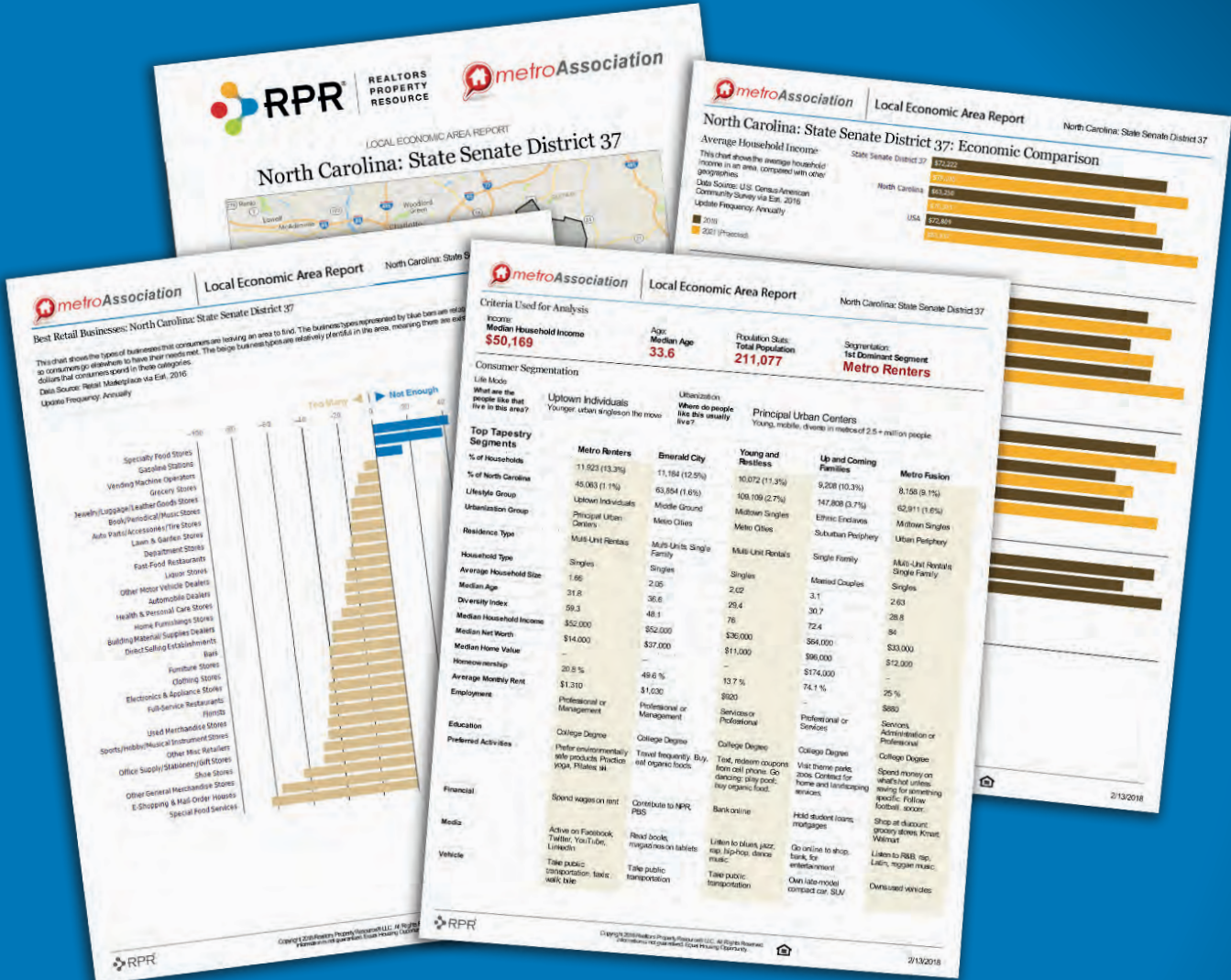
AE Fundamentals



Communications & Technology



MLS



# Economic Reports for Enterprising AEs

Register your Association for the RPR Dashboard and Economic Area Reports today!  
[rpr.me/rprdashboard](http://rpr.me/rprdashboard)







# Daily Schedule

Saturday, March 24 - RCE Apparel Day

1952

CHICAGO

Wesley P. Stevens  
New Jersey Association of Real Estate Boards

1953

CHICAGO

Phil E. Berg  
Colorado Association of Real Estate Boards and Denver Board

1954

CHICAGO

Phil E. Berg  
Colorado Association of Real Estate Boards and Denver Board

1955

CHICAGO

James J. Spatz  
Dayton Real Estate Board (OH)

1956

CHICAGO

Robert Schott  
San Jose Real Estate Board (CA)

1957

CHICAGO

Robert Schott  
San Jose Real Estate Board (CA)

1958

CHICAGO

Bill Hammond  
Real Estate Board of Greater Baltimore (MD)

1959

CHICAGO

W.J.B. Schimfessel  
Arizona Association and Phoenix Real Estate Board

## Workshop: What Commercial Members Need from Their Association

**12:45 p.m. - 1:45 p.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level  
*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: From Red to Black: Professional Development Revenue Streams

**12:45 p.m. - 1:45 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level  
*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, appraisers, and commercial members, while increasing revenue. Explore how establishing and building partnerships, marketing and pricing, and thinking outside the box can help you increase education revenue streams.

## AIP/One-on-One Sessions

**1:00 p.m. - 4:00 p.m.** | Westin Charlotte | Park Room, Level Two

## State Chief Staff Meeting

**1:30 p.m. - 3:00 p.m.** | Westin Charlotte | Providence Ballroom I, Lobby Level  
An opportunity for state association chief staff executives to discuss issues and share insights. Attendance is limited to state chief staff only.

## Beyond the Planning Retreat Bubble: Create Alignment through Collaboration



**2:00 p.m. - 3:00 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two  
*Evan Fuchs, ABR, AHWD, CRS, e-PRO, GRI, RENE, RSPS, SFR, SRS, Broker, Trainer, Speaker, Real Success Concepts, Bullhead City, AZ*

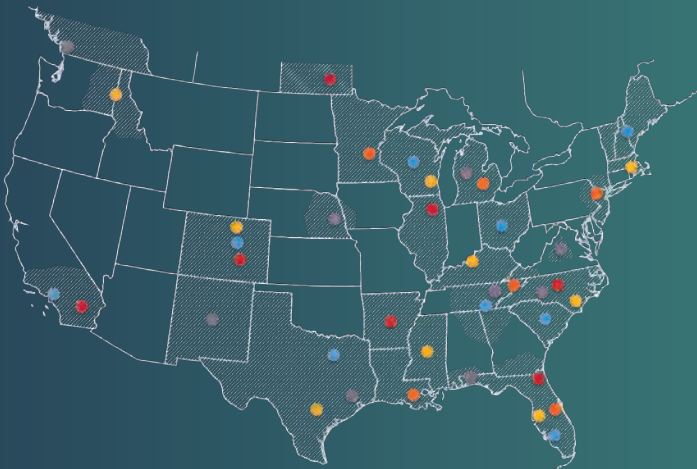
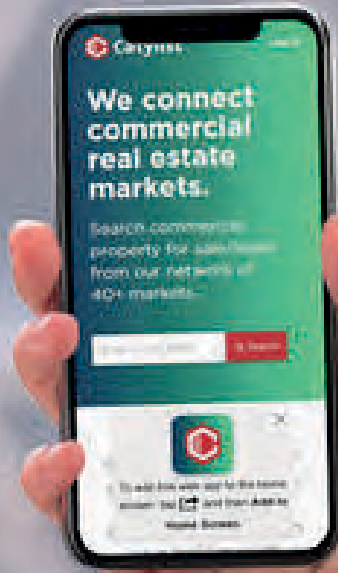
For associations to succeed, staff and volunteers must work together with a clear purpose, and an understanding of evolving member business needs. Learn how to create alignment among your members and build on existing strengths by implementing a collaborative process that incorporates input from various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

### Program Key

- Advocacy
- Association Culture & Collaboration
- Leadership
- AE Fundamentals
- Communications & Technology
- MLS



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Commercial Association of REALTORS® New Mexico  
Commercial Board of REALTORS® Michigan  
Florida Gulfcoast Commercial Association of REALTORS®  
Greater Baton Rouge Association of REALTORS®  
Greater Chattanooga Association of REALTORS®  
**NEW** - Greensboro Regional REALTORS® Association  
Greater Louisville Association of REALTORS®  
**NEW** - High Point Regional Association of REALTORS®  
Knoxville Area Association of REALTORS®  
Maine Commercial Association of REALTORS®  
Mobile Area Association of REALTORS®  
My Florida Regional MLS  
New Hampshire Commercial Investment Board of REALTORS®  
New Orleans Metropolitan Association of REALTORS®  
Pensacola Association of REALTORS®  
**NEW** - Real Estate Board of Greater Vancouver  
REALTOR® Association of Acadiana  
**NEW** - REALTORS® Association of Lincoln  
Royal Palm Coast REALTOR® Association  
South Carolina Commercial MLS  
Statewide MLS Rhode Island  
**NEW** - Tallahassee Board of REALTORS®  
**NEW** - Winnipeg REALTORS®  
**NEW** - Winston-Salem Regional Association of REALTORS®

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75  
YEARS

OF SUPPORTING OUR PROFESSION

1960

CHICAGO

John Baswell

Alabama Real Estate  
Association and Birmingham  
Real Estate Board

1961

CHICAGO

Marjorie Miller

Des Moines Real Estate Board  
(IA)

1962

CHICAGO

Robert S. Elwell

Real Estate Board of Rochester  
(NY)

1963

CHICAGO

Charles Welch

Louisville Real Estate Board  
(KY)

1964

CHICAGO

**We've Come of Age!**

Kenneth L. Sampson  
Toledo Board (OH)

1965

DENVER

**On to New Heights of  
Education**

Robert E. Cook

Illinois Association of Real  
Estate Boards

1966

CHICAGO

Lee Doucette

Minneapolis Board (MN)

1967

ALBUQUERQUE

Milton Strouse

Pennsylvania Realtors  
Association

# Daily Schedule

Saturday, March 24 - RCE Apparel Day

## Be the Informed, Social and Connected AE

CT

**2:00 p.m. - 3:00 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

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!

L

**2:00 p.m. - 3:00 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two

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?

MLS

**2:00 p.m. - 3:00 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

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

Panelists: Brad Bjelke, CEO, UtahRealEstate.com, Sandy, UT; Holly Mabery, ABR, GRI, RSPS, SRS, Chief Instigator, Real Chaos Solutions, LLC, Cottonwood, AZ; Shelley Specchio, RCE, e-PRO, CMLX3, CEO, MIBOR REALTOR® Association, Indianapolis, IN

The MLS is evolving into a complex and innovative landscape that can be a challenge to manage. From policy changes to technology trends, this session will help make sense of the newest MLS initiatives. Learn strategies and best practices to elevate customer service, increase engagement and further collaboration with your members. MLS users want services and tools that allow their business to grow. Listen closely to this panel of experts and hear how you can help your MLS move into the future.

## NAR Policy 101

AEF

**2:00 p.m. - 3:00 p.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

Rodney Gansho, RCE, Managing Director, Member Policy, Association and MLS Governance, NAR; Jeremy Green, Policy Consultant, Association and MLS Governance, NAR; Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Association and MLS Governance, 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.

## SNACK BREAK

**3:00 p.m. - 3:30 p.m.** | Westin Charlotte | Grand Ballroom Foyer, Level Two

### Program Key



Advocacy



Association Culture & Collaboration



Leadership



AE Fundamentals



Communications & Technology



MLS



Supra is proud to sponsor the AE Institute Icebreaker Reception on March 24

## Opening doors is just the beginning



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# Daily Schedule

Saturday, March 24 - RCE Apparel Day

1968  
**CHICAGO**  
**A Quarter Century of Education**  
 William Magel  
 New York State Association of Real Estate Boards

1969  
**ATLANTA**  
 The Changing Times  
 John Mosely  
 Southern Alameda County Board (CA)

1970  
**CHICAGO**  
 The Decade of Change  
 Robert Ferguson  
 New Jersey Association of Realtor Boards

1971  
**SAN DIEGO**  
**Dialogue and Decision**  
 Frank Rogers  
 Cincinnati Real Estate Board (OH)

1972  
**CHICAGO**  
 James L. Bichsel  
 North Carolina Association

1973  
**ORLANDO**  
 Gardner Dougherty  
 Greater Hartford Board (CT)

1974  
**CHICAGO**  
 Norman Chappel  
 Fort Lauderdale Area Board (FL)

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

**3:45 p.m. - 5:00 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level  
*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 Core Standards, and communicate your advocacy successes so everyone (consumers, elected officials, and members) are engaged.

## Stay Relevant in the Digital Information Age CC

**3:45 p.m. - 5:00 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two  
*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.

## Technology Tools Your Team Will Actually Love CT

**3:45 p.m. - 5:00 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two  
*Craig Grant, e-PRO, CEO, The Real Estate Technology Institute, Stuart, FL*

How would you like to eliminate a lot of time and cost from your daily activities? This includes reducing operational costs such as printing certificates and course manuals, and learning some time-saving technological tricks and tools. Wouldn't you like to get some of your valuable time back to do other things, such as member outreach? Then get ready to love this session as Craig shares some awesome tools to accomplish all that and more.

## The Power of Synergy - How to Work with Volunteers L

**3:45 p.m. - 5:00 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two  
*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

**5:30 p.m. - 8:30 p.m.** | NASCAR Hall of Fame

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!

*Sponsored by: SUPRA*

### Program Key

- Advocacy
- Association Culture & Collaboration
- Leadership
- AE Fundamentals
- Communications & Technology
- MLS



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75  
YEARS

OF SUPPORTING OUR PROFESSION

1975

PHOENIX

Jerry Kraus  
San Diego Board (CA)

1976

CHICAGO

Almon "Bud" Smith  
Ohio Association

1977

ALBUQUERQUE

**How to Do It Better**

Charles Staro  
New York State Association

1978

CHICAGO

**Professional  
Perspective**

Jess Olivan  
Contra Costa Board (CA)

1979

ATLANTA

**Tomorrow's Challenges  
Today**

Michael Whalen  
Greater Boston Real Estate  
Board (MA)

1980

CHICAGO

**Passport to the 80's**

Barbara Lindquist  
Fort Collins Board (CO)

1981

SAN DIEGO

**On the Crest of the  
Wave**

William Cozart  
Nevada Association

# Daily Schedule

Sunday, March 25 - AEI Throwback Apparel Day

## New Day Dawning: NAR in 2018 and Beyond; Breakfast with NAR CEO Bob Goldberg

**Breakfast 8:00 a.m. - 8:30 a.m. | Program 8:30 a.m. - 9:30 a.m.**

Sheraton Charlotte | Symphony Ballroom, First Floor

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.

*Sponsored by: NAR Office of the CEO*

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



**10:30 a.m. - 11:30 a.m.** | Westin Charlotte | Grand Ballroom D, Level Two

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. 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.** | Westin Charlotte | Grand Ballroom C, Level Two

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.** | Westin Charlotte | Grand Ballroom AB, Level Two

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.** | Westin Charlotte | Providence Ballroom III, Lobby Level

Facilitator: Cady Thomas, Senior Vice President of Government Affairs, North Carolina REALTORS®

Panelists: 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.

### Program Key



Advocacy



Association Culture & Collaboration



Leadership



AE Fundamentals



Communications & Technology



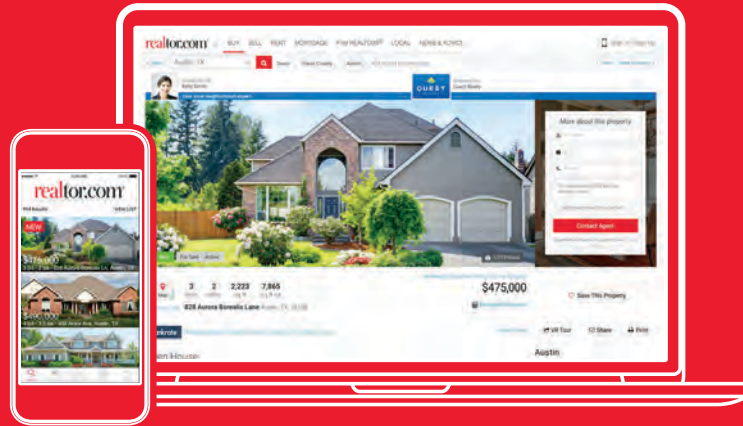
MLS



# realtor.com®

## WHY REALTOR.COM®?

- ✓ NO for sale-by-owner listings
- ✓ NO computer estimates on active listings - real estate professionals determine the home's market value
- ✓ FREE global listings exposure



## BRAND ADVANTAGES

- ✓ 68% increase in average monthly traffic over the last three years. 55 million unique monthly users<sup>3</sup>
- ✓ #1 real estate site for engagement; realtor.com® #1 for engagement in real estate websites and even above many leading consumer sites, such as Amazon, LinkedIn, Google and Twitter<sup>1</sup>

## REALTOR.COM® BUILDS BUSINESS

- ✓ Consumers ranked realtor.com® #1 in terms of how they found their agent and in helping to sell their home<sup>2</sup>

## INNOVATIVE MEMBER OPPORTUNITIES

- ✓ **Real Connections Webinar Series - APRIL 10th @ 11:00 am PST**  
A monthly webinar for State and Local Association marketers, communicators and social media staff featuring industry experts on topics such as “Marketing to Millennial’s”, “Integrated Marketing”, “Cryptocurrency” and other current issues.

**Visit [rltr.cm/realcon](http://rltr.cm/realcon) to register**

The focus of realtor.com is keeping the REALTOR® at the heart of the real estate journey. Reach out and contact us for more realtor.com® advantages.

<sup>1</sup>Based on the most recent ComScore report (Oct. 2017)

<sup>2</sup>According to addendum questions in the 2017 NAR Profile of Buyers and Sellers

<sup>3</sup>Internal metrics: Quarter ended Sept. 30, 2017

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75  
YEARS

OF SUPPORTING OUR PROFESSION

1982

CHICAGO

**Exploring New Horizons**

John F. Osta

Greater Syracuse Board (NY)

1983

ARLINGTON

**Capital Experience**

G. Bradford Johnson

Columbus Board (OH)

1984

CHICAGO

**The Executive Connection**

Lynda M. Blacque

Greater Hartford Board (CT)

1985

RENO

**Pursuit of Excellence**

Patricia Huebner

LaGrange Board (IL)

1986

PHILADELPHIA

**Past Perspective/Future Focus**

Raymond Blair

Illinois Association

1987

PHOENIX

**Pioneers to Professionals**

George Patt

Oklahoma Association

1988

LEXINGTON

**The Winning Tradition**

C. Susan Black

Scottsdale Board (AZ)

# Daily Schedule

Sunday, March 25 - AEI Throwback Apparel Day

## NAR Dues Policies and Dues Remittance Procedures



**10:30 a.m. - 11:30 a.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

*John Pierpoint, CFO, SVP Finance & Buildings, 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.

## AIP/Investment Process and Strategy

**10:30 a.m. - 11:30 a.m.** | Westin Charlotte | Park Room, Level Two

## AIP/One-on-One Sessions

**11:30 a.m. - 2:00 p.m.** | Westin Charlotte | Park Room, Level Two

## Collaboration: The By-Product of a Healthy Culture



**11:45 a.m. - 12:45 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two

*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!

## Get Inked! How to Earn Media Coverage



**11:45 a.m. - 12:45 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

*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!

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



**11:45 a.m. - 12:45 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two

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

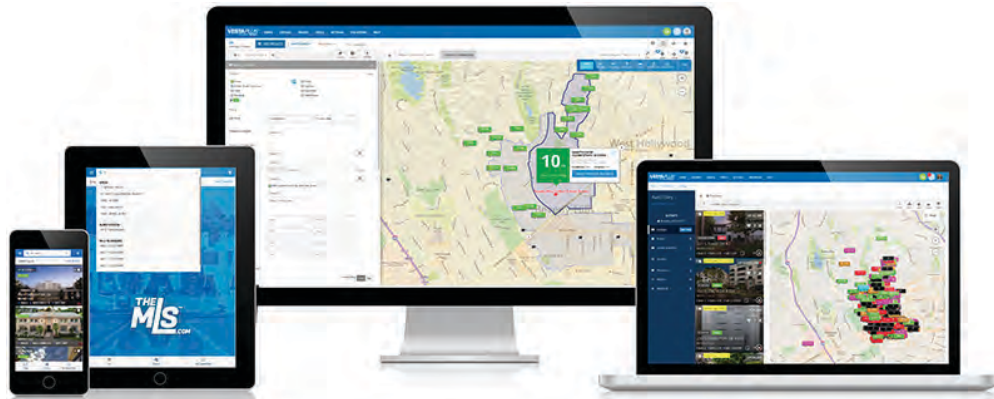
Each day we brave a new wilderness. We live in interesting times as humans; both seeking approval and trying to rebel from authority. True leadership doesn't require us to *change* who we are. It requires us to *be* who we are. This session invites you to Be - YOU - to a full. This session shares case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

### Program Key

- Advocacy
- Association Culture & Collaboration
- Leadership
- AE Fundamentals
- Communications & Technology
- MLS

# Your Next Generation MLS System

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**310.358.1100 ext. 163**  
or email  
[marketing@themls.com](mailto:marketing@themls.com)





1989

BOSTON

**The Learning Revolution**

Carole Badger  
Greater Madison Board (WI)

1990

SAN DIEGO

**Chart Your Course**

Jesse Livesay  
Dayton Area Board (OH)

1991

MINNEAPOLIS

**Excellence by Design**

Marilyn Moran, RCE  
Plymouth County Board (MA)

1992

ORLANDO

**The Magic of Learning**

Roy Currie  
Charlotte Association (NC)

1993

SAN FRANCISCO

**Golden Anniversary by the Golden Gate**

James Link  
San Fernando Valley Association (CA)

1994

NASHVILLE

**Shine With the Stars**

Diane Ruggiero, RCE  
Burlington County Board (NJ)

1995

CHICAGO

**Beyond Borders**

Michelle Brown and Scott Macivor  
Colorado Association and Toronto Real Estate Board (Ontario, Canada)

# Daily Schedule

Sunday, March 25 – AEI Throwback Apparel Day

MLS

## MLS Cybercrime and Cybersecurity Best Practices

**11:45 a.m. – 12:45 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

*Chloe Hecht, Senior 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.

AEF

## Core Standards 101

**11:45 a.m. – 12:45 a.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

*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 ensure 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.

## Grab-and-Go Lunch

**12:45 p.m. – 1:15 p.m.** | Westin Charlotte | Grand Ballroom Foyer, Level Two

Grab a sandwich and a drink and head to a networking roundtable or workshop, drop in on the NAR Dues Forum, or help with the charity project (A Child's Place).

*Sponsored by: Rapattoni*

## NAR Dues Forum

**1:00 p.m. – 2:00 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

*Panelists: Elizabeth Mendenhall, President, NAR; John Smaby, President-Elect, NAR; Tom Riley, Treasurer, NAR; Bob Goldberg, CEO, NAR; Bill Malkasian, SVP, Chief Advocacy Officer, NAR; Laura Crowther, RCE, CEO, Coastal Carolinas Association of REALTORS®, SC; Bill Martin, RCE, CEO, Florida Association of REALTORS®; John Sebree, RCE, Missouri REALTORS®*

Hear first-hand from NAR leaders how they're leading the organization forward and how new initiatives will be funded. This is your chance to have your questions answered so you can take this information back to your members and help them be more informed when it's time to vote on these proposed changes.

## Networking Roundtables







**1:00 p.m. – 2:00 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two

Take some time to share tried and true solutions. These roundtables will help you connect with your peers and exchange different experiences and perspectives in the REALTOR® association management world and the real estate industry.

## AEI Charity Project – A Child's Place

**1:00 p.m. – 2:00 p.m.** | Westin Charlotte | Uptown Ballroom, Lobby Level

### Program Key

 Advocacy	 Association Culture & Collaboration	 Leadership
 AE Fundamentals	 Communications & Technology	 MLS

**FAIR HOUSING**  
**MAKES U.S.**  
**STRONGER**

# COMMEMORATE THE 50<sup>TH</sup> ANNIVERSARY OF THE FAIR HOUSING ACT

- ✓ Showcase the “Bug” and utilize these Communications Resources created by NAR to underscore how **Fair Housing Makes Us Stronger**
- ✓ Use the hashtag: **#FairHousingMakesUSStronger**
- ✓ Share your story and read examples of how other Associations are joining the commemoration at **www.FairHousing.realtor**

## Campaign “Bug”



## Articles



## Poster



## Association Co-op Print Ads



## Banner Ads



Visit NAR Resource Table for more information:  
 Westin Charlotte Hotel, Grand Ballroom Promenade Foyer, Level 2





1996

ATLANTA

**A World Class Experience**

Claire Shahzad

*Northeast Tarrant County Board (TX)*

1997

LOS ANGELES

**Dream It... Do It!**

Deborah van Eersel

*Charlottesville Area Association (VA)*

1998

DENVER

**Summit '98 - A Peak Experience**

Dianne McMillan

*North San Diego County Association (CA)*

1999

BANFF

(ALBERTA, CANADA)

**Nations Achieving Results, Canadian Rockies Educational Adventure**

Peter Cornell and Dan Russell

*Ann Arbor Board (MI) and Alberta Real Estate Association (Canada)*

2000

BOSTON

**Ivy League Institute**

Foster Edwards, RCE

*Corpus Christi Association (TX)*

# Daily Schedule

Sunday, March 25 - AEI Throwback Apparel Day

## Workshop: Board Orientation Toolkit Overview

**1:00 p.m. - 2:00 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two

*Presented by the AE YPN Advisory Board*

*Michele Holen, RCE, Chief Operating Officer, Portland Metropolitan Association of REALTORS®; OR; Katie Shotts, RCE, e-PRO, Chief Operating Officer, Pinellas REALTOR® Organization, FL*

Giving your board of directors an overview of their duties just got a lot easier. Join Michele Holen, RCE, chair of the 2017 Board Orientation Work Group and 2018 AE YPN Advisory Board chair, and Katie Shotts, RCE, member of the 2017 Board Orientation Work Group and 2018 AE Institute Advisory Board, as they walk you through the new Board Orientation Toolkit and share how to customize it for your board of directors.

## Workshop: Leverage Technology to Transform Association Offices for Members

**1:00 p.m. - 2:00 p.m.** | Westin Charlotte | Providence Ballroom I, Lobby Level

*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. Learn how easy it can be to meet members' technology needs right in your association office, and see some of this technology in action with an onsite demonstration.

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

**1:00 p.m. - 2:00 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

*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.

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



**2:15 p.m. - 3:15 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

*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!

### Program Key

Advocacy	Association Culture & Collaboration	Leadership
AE Fundamentals	Communications & Technology	MLS



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Get started at [BoxMLS.com](https://www.BoxMLS.com)

The screenshot shows the BoxMLS web application interface. At the top, there is a search bar with the placeholder text "Address, Street, Area, City, Zip, Building" and a "Search" button. To the right of the search bar are navigation links for "Pricing", "Brokerages", "MLS", "Create an account", "Sign In", and a help icon. Below the search bar is a map of the San Francisco Bay Area with various neighborhoods labeled. A "Search Options" panel is open on the right side of the map, containing a "Select Areas" button, a "Save Search" button, and a "Status" section with checkboxes for "Active", "In Contract", "Pending", "Sold", "Off Market", "Price Reduction", and "Has Open House". Below the "Status" section are dropdown menus for "Type", "Price", and "Beds & Baths". At the bottom of the map, it says "265 Results" and "Reset Search". Below the map is a table of search results with columns for "Type", "Address", "Area", "Price", "Status", "Beds", "Baths", "Sq Ft", "\$/Sq Ft", "Days", and "Agent".

Type	Address	Area	Price	Status	Beds	Baths	Sq Ft	\$/Sq Ft	Days	Agent	
	63 Bulkley Ave... Sausalito, CA 94965	Sausalito	\$4,200,000	Active	3	4	2	4,137	\$1,015...	7 ho...	Christina M McN... Golden Gate Sothe...
	1070 Green Str... San Francisco, CA 94133	Russian Hill	\$3,200,000	Active	2	2	1	1,616	\$1,980...	8 ho...	Nina Hatvany Pacific Union Intern...



2001

NEW ORLEANS

**2001: A Learning Odyssey**

Ginger Downs, RCE  
Seattle King County Association (WA)

2002

ST. LOUIS

**This Institute's For You**

Henry DiGiacomo, RCE  
Cape Cod & Islands Association (MA)

2003

CHICAGO

**Color & Light: The Picture of Professionalism**

R. Scott Brunner, RCE  
Mississippi Association

2004

CINCINNATI

**Dare to Dance the Tide**

Helen Carter, RCE  
Williamson County Association (TN)

2005

VANCOUVER

(BRITISH COLUMBIA, CANADA)

**Beyond Borders: 2005**

Terry Penza, RCE and Brad Scott  
North Shore-Barrington Association (IL) and Real Estate Board of Greater Vancouver (British Columbia, Canada)

# Daily Schedule

Sunday, March 25 - AEI Throwback Apparel Day

## Work Together for a Better Community



**2:15 p.m. - 3:15 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two

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

*Panelists: Laura D. Belcher, President & 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



**2:15 p.m. - 3:15 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two

*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.

## Develop and Launch a REALTOR® Value Campaign



**2:15 p.m. - 3:15 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

*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 Julianano, 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 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 it will come together if you focus on your audience.

## I'm a New AE, Now What?



**2:15 p.m. - 3:15 p.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

*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.

### Program Key

- Advocacy
- Association Culture & Collaboration
- Leadership
- AE Fundamentals
- Communications & Technology
- MLS



2018  
ENTRY  
DEADLINE  
MAY 4

I am so grateful  
our story was told.

REALTOR® Kay Wilson-Bolton serves hot meals to 600 people in need each week. Because she was selected as a 2017 Good Neighbor Award winner, her nonprofit received \$10,000 and national publicity so that she can do even more good.



**Nominate a REALTOR® to Win \$10,000.**

Visit [nar.realtor/gna](http://nar.realtor/gna). Click "Nominate" for entry form and "For Media and AEs" for the Media Kit.

**AEs: Do you have your own Good Neighbor Awards?** NAR can help! We provide all the materials, one-on-one counseling, and possible grant money to make it turn-key for state and local boards. Contact Sara Geimer at [sgeimer@realtors.org](mailto:sgeimer@realtors.org)

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75  
YEARS

OF SUPPORTING OUR PROFESSION

2006

RENO

**Find Your Winning Combination**

Dave Phillips, RCE  
Charlottesville Area Association (VA)

2007

SAN DIEGO

**Navigate to Success**

Tracy Huotari, RCE  
Duluth Area Association (MN)

2008

BOSTON

**Innovate, Educate, Celebrate**

Patrick Reilly, RCE  
New York State Association

2009

COLORADO SPRINGS

**Reach Your Peak**

Bob Hamilton, RCE  
Georgia Association

2010

QUEBEC CITY  
(QUEBEC, CANADA)

**Beyond Borders: 2010**

Jenny Pakula, RCE and Ed Barisa  
Oregon Association and Ontario Real Estate Association (Canada)

2011

DALLAS

**Big, Bold, Breakthrough**

Rebecca Grossman, RCE  
Virginia Peninsula Association

# Daily Schedule

Sunday, March 25 - AEI Throwback Apparel Day

## Fundraising - RPAC and Beyond

**3:30 p.m. - 4:30 p.m.** | Westin Charlotte | Grand Ballroom C, Level Two

*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

**3:30 p.m. - 4:30 p.m.** | Westin Charlotte | Grand Ballroom D, Level Two

*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 Productive and Balanced Life

**3:30 p.m. - 4:30 p.m.** | Westin Charlotte | Grand Ballroom AB, Level Two

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

Squeezing more hours out of your day is not always possible. If your workload is growing and you constantly feel overwhelmed and stressed, then this is the right talk for you. Learn how to manage your time and energy to lower your stress, increase your productivity, and find more balance in your life.

## How MLS Data Moves

**3:30 p.m. - 4:30 p.m.** | Westin Charlotte | Providence Ballroom III, Lobby Level

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

*Panelists: Matt Fowler, Vice President of Portals, FBS Creators of Flexmls, Huntsville, AL; Mitchell Skinner, Managing Attorney, Larson Skinner PLLC, Minneapolis, MN; 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, and the three ways brokers disseminate data, and the role the MLS plays to safeguard the information through licensing.

## RPAC Major Investor Reception

**4:30 p.m. - 5:30 p.m.** | Westin Charlotte | JP Charlotte, Lobby Level

*This special reception is for RPAC major investors.*

### Program Key

 Advocacy	 Association Culture & Collaboration	 Leadership
 AE Fundamentals	 Communications & Technology	 MLS

# Can't decide which sessions to attend at AEI?

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Regular Pricing	<del>\$295</del>	<del>\$349</del>	<del>\$395</del>
<b>NEW!</b> Playback Now APP Player	✓	✓	✓
39 Recorded Sessions	✓	✓	✓
Immediate Streaming Access to Recorded Sessions**	✓	✓	✓
Video MP4 Files of Sessions	✓	✓	✓
Audio MP3 Files of Sessions		✓	✓
Online Access to Available Presenter Reference Material		✓	✓
Unlimited Downloads of All Sessions For 12 Months		✓	✓
All MP3+MP4 Files on USB Flash Drive Free Domestic Shipping			✓



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\*\*Conference content available for access within 24 to 48 hours after the session.



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**Playback Now**

**NARAEI.PLAYBACKNOW.COM | 800.241.7785**



# Daily Schedule

Monday, March 26

2012

LOUISVILLE

## The Triple Crown: It All Starts Here

Mary Cano, RCE  
North Central Jersey Association

2013

SAN DIEGO

## A New Perspective

Marc Lebowitz, RCE  
Ada County Association (ID)

2014

BALTIMORE

## The Future: Own It!

Steve Volkodav, RCE  
North Shore-Barrington Association (IL)

2015

VANCOUVER (BRITISH COLUMBIA, CANADA)

## Beyond Borders: 2015

Carol Seal, RCE and Rob Philipp  
Greater Chattanooga Association (TN) and Fraser Valley Real Estate Board (British Columbia, Canada)

2016

SAN ANTONIO

Teresa Hatton, RCE  
Greenwich Association (CT)

2017

DENVER

Laura Crowther, RCE  
Coastal Carolinas Association (SC)

2018

CHARLOTTE

Angela Shields, RCE  
Tennessee Association

## RCE Overview and ADF Workshop

**7:00 a.m. - 8:00 a.m.** | Westin Charlotte | Providence Ballroom II, Lobby Level

## Continental Breakfast

**7:30 a.m. - 8:30 a.m.** | Westin Charlotte | Grand Ballroom Foyer, Level Two

## General Session

**8:30 a.m. - 10:00 a.m.** | Westin Charlotte | Grand Ballroom, Level Two

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. Before Dr. Rigsby gets underway, we'll take some time to honor the 2017 RCE designees.

## Collaboration Skills for Success (lunch provided)







**10:30 a.m. - 3:00 p.m.** | Westin Charlotte | Grand Ballroom, Level Two

*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.

*Buffet lunch sponsored by CCIM.*

### Program Key

 Advocacy	 Association Culture & Collaboration	 Leadership
 AE Fundamentals	 Communications & Technology	 MLS



# Guide To Sponsor's Products And Services

We wish to thank the following companies for their generous sponsorship of the 2018 AE Institute.

## **ABR® (Accredited Buyer's Representative)**

430 N. Michigan Avenue  
Chicago, IL 60611  
800 648-6224  
REBAC.net

The ABR® designation is designed for REALTORS® who represent buyers in residential real estate transactions. REALTORS® who have earned the ABR® designation demonstrate commitment to buyers, as well as a high standard of professionalism.

## **Black Knight MLS Solutions**

4400 College Blvd.  
Suite 300  
Overland Park, KS 66211  
913 693-0000

[www.BlackKnightMLSolutions.com](http://www.BlackKnightMLSolutions.com)

Black Knight MLS Solutions offers comprehensive systems and value added services for MLS Associations/Boards and their members. Find out why Paragon is the right choice!

## **BoxMLS**

1400 Castro Street  
San Francisco, CA 94114  
415 997-9964  
boxmls.com

BoxMLS leverages the power of traditional MLS tools in an intelligent, user-friendly interface. Agents and their clients can search data across MLSs to match their individual needs, streamlining agent-client collaboration.

## **Catylist**

2360 East Stadium  
Ann Arbor, MI 48104  
920 605-7590  
www.catylist.com

Catylist offers the #1 commercial listing service for REALTOR® associations in North America and the #1 fully-researched service for REALTOR® associations nationwide.

## **CCIM Institute**

430 N. Michigan Avenue  
Suite 700  
Chicago, IL 60611  
312 321-4460  
www.ccim.com

CCIM created the language of global real estate investment. Our courses and worldwide community deploy commercial real estate investment methodologies and tools that speed the pathway between opportunity, a go/no go decision, and success for an asset, taught by instructors who are themselves industry leaders.

## **Center for REALTOR® Development**

430 North Michigan Avenue  
Chicago, IL 60611  
www.onlinelearning.realtor

The Center for REALTOR® Development is the exclusive provider of online designation and certification courses for the National Association of REALTORS®. Join the Affiliate Partner Program and receive non-dues revenue for your association.

## **Centralized Showing Service**

11225 College Blvd.  
Suite 450  
Overland Park, KS 66210  
913 851-8405  
www.Showings.com

Centralized Showing Service works with agents to simplify the showing appointment process by providing one number to schedule home showing appointments. CSS benefits entire boards, offices, and individual agents.

## **Charlotte Regional REALTOR® Association**

1201 Greenwood Cliff  
Suite 200  
Charlotte, NC 28204  
704-372-0911  
www.carolinahome.com

The Charlotte Regional Realtor® Association provides its more than 10,000 Realtor® members with the resources and services they need to conduct ethical, professional, successful and profitable businesses. The association is dedicated to being the region's primary resource for residential real estate information.

## **CoreLogic**

40 Pacifica  
Suite 900  
Irvine, CA 92618  
866 221-9291  
www.corelogic.com  
www.clareity.com

CoreLogic Real Estate Solutions offers a full line of real estate technology products and services for multiple listing organizations, brokers, and agents.

## **dynaConnections**

1101 S. Capital of Texas Hwy.  
H-130  
Austin, TX 78746  
512 306-9898  
www.dynaconnections.com

dynaConnections is the developer of connectMLS, a top-rated MLS solution built intuitively with responsive design. Industry leader in connecting members to their data while on-the-go, across platforms, browsers and devices.

## **FBS-Creators of Flexmls®**

3415 39th Street South  
Fargo, ND 58104  
701 235-7300  
www.flexmls.com

The most powerful MLS software available, Flexmls® connects 220,000 real estate professionals and consumers to the most accurate property information on any device.

## **Form Simplicity/Tech Helpline**

7025 Augusta National Drive  
Orlando, FL 32822  
888 784-5404  
www.formsimplicity.com  
www.techhelpline.com

Form Simplicity is a paperless transaction solution available to associations and brokerages. U.S.-based tech support, Tech Helpline, provides REALTORS® technical support on behalf of associations, MLSs or brokerages.

# Guide To Sponsor's Products And Services

## Lone Wolf Technologies

717 N. Harwood St.  
Suite 2200  
Dallas, TX 75201  
866 279-9653  
[www.lwolf.com](http://www.lwolf.com)

"Lone Wolf Technologies-where Real Estate and Technology meet. We enjoy making software for real estate brokerages to help with their back office and accounting, transaction management and websites."

## Member Value Plus (MVP) Program

430 N Michigan Avenue  
Chicago, IL 60611  
800-874-6500  
[www.NAR.realtor/MVPAE](http://www.NAR.realtor/MVPAE)

Visit the Member Value Plus (MVP) Program resource table to find out how you and your members can take part in simple actions and earn real rewards curated for your business. Take action with MVP at AEI to start earning non-dues revenue for your association, plus receive a free copy of the "Little Book" Series 4 Pack.

## MMSI

Severna Park, MD  
800 987-3636  
[GoMMSI.com](http://GoMMSI.com)

MMSI offers the most intuitive, accurate, and customizable membership and accounting system on the market for REALTOR® associations and MLSs. Celebrating 33 years of providing first-class customer service. We offer an industry leading, full responsive, and ADA-compliant Member Portal, SSO Dashboard, Identity Management, and much more. Contact Scott Quinn at 443 949-3877/[scott@GoMMSI.com](mailto:scott@GoMMSI.com) for more information. Don't Compromise, Customize.

## NATIONAL ASSOCIATION OF REALTORS®

430 North Michigan Avenue  
Chicago, IL 60611  
800 874-6500  
[www.nar.realtor](http://www.nar.realtor)

Visit the NAR Resource Table to learn about the latest tools and resources from NAR to help you communicate the value of membership! Stop by to learn how your Association can commemorate the 50th anniversary of the Fair Housing Act.

Learn about NAR's Orientation resources for Associations, including the Online Orientation National Module, and the Association Resource Packet, available from the REALTOR® Store. Hear details about the 2018 REALTOR® Safety Reimbursement Grant Program. This is the place to learn about the NEW AE Admin system for the Member Center where you can update your Association's content and events.

## NAR Fair Housing Commemoration Commemorating 50 Years of the Fair Housing Act

[www.FairHousing.realtor](http://www.FairHousing.realtor)

NAR's yearlong commemoration of the 50th Anniversary of the Fair Housing Act will raise awareness about the significance of this law and create opportunities for advocacy and involvement. NAR has provided a variety of communication resources to help you share with your members the importance fair housing plays in our industry. We encourage you to join NAR in this commitment. Visit the website to learn about the commemoration, to find materials and resources you can use, and to share what you are doing to commemorate the anniversary.

## NC REALTORS®

4511 Weybridge Lane  
Greensboro, NC 27407  
336 294-1415  
[www.ncrealtors.org](http://www.ncrealtors.org)

NC REALTORS® is the 8th largest REALTOR® association in the nation and one of the largest and most influential trade associations in North Carolina, representing 42,000 members and 48 local associations.

## Rapattoni Corporation

98 West Cochran Street  
Simi Valley, CA 93065  
800 722-7338  
[www.rapattoni.com](http://www.rapattoni.com)

Rapattoni Corporation has been serving the real estate industry for over 47 years with products and services including a dynamic MLS with customer -branded mobile apps, association management software plus membership API, and Integrated website services.

## Realtor.com®

3315 Scott Blvd.  
Santa Clara, CA 95054  
800 878-4166  
[www.realtor.com](http://www.realtor.com)

Realtor.com® is the trusted resource for all things home by offering more for-sale listings than any competing national site, insightful information for home seekers, owners and dreamers, and connections to real estate professionals when the time is right. Realtor.com® provides professionals with the services and technology to help better serve clients and be more successful.

## .realtor™

430 N. Michigan Avenue  
Chicago, IL 60611  
866 361-3029  
[www.get.realtor/AEI18](http://www.get.realtor/AEI18)

Encourage your members to increase their visibility in 2018 with easy-to-use online tools from .realtor™ including personalized domains, professional Gmail and free website options. Make sure to remind your members that their first .realtor™ web address is FREE for the first year! Resources are available for you to download and share with your members. Visit the .realtor™ resource table in the Grand Ballroom Promenade Foyer, Level 2 of the Westin Charlotte Hotel, for more information on how your members can benefit from a .realtor™ web and email address.

## REALTOR® Store

430 N Michigan Avenue  
Chicago, IL 60611  
800-874-6500  
[www.NAR.realtor/Store](http://www.NAR.realtor/Store)

The online REALTOR® Store offers hundreds of business-boosting products to help you succeed. Purchase publications, research reports and more for you and your members, including the new *Little Purple Book: International Rules to Live By for REALTORS®* and *Housing Point: Fair Housing Act Video Download*. Visit us at AEI and spin the digital prize wheel to earn REALTOR® Store discounts, free products and even a \$150 REALTOR® Store coupon.

# Guide To Sponsor's Products And Services

## **REALTOR® University Graduate School of Real Estate**

430 N. Michigan Ave  
Chicago, IL 60611  
855 786-6546 x1  
[www.RealtorU.edu](http://www.RealtorU.edu)

REALTOR® University is the only accredited institution of higher education focused exclusively on real estate. REALTOR® University has two programs tailored to Association Executives. Students can choose to earn a Master of Real Estate (MRE) Degree in the Real Estate Association Management concentration, or earn the Graduate Certificate.

## **Realtors Property Resource® (RPR®)**

430 N. Michigan Avenue  
Chicago, IL 60611-4087  
877 977-7576  
[www.narrpr.com](http://www.narrpr.com)  
[blog.narrpr.com](http://blog.narrpr.com)

RPR provides REALTORS® and Associations exclusive access to unparalleled property data, analytical tools, local market trends, customizable reports, and much more. Plus, the power of RPR's app puts every agent in the driver's seat when working with clients.

## **SEI/NAVICA MLS**

P.O. Box 8709  
Greensboro, NC 27419  
800 367-8756  
[www.seisystems.com](http://www.seisystems.com)

NAVICA is the premier online browser based MLS system. Usable with Windows PC, MAC, iPhone and iPad. Now offering NAVICA Streamline Association Management System, with Real-Time NRDS Sync and QuickBooks integrations.

## **ShowingTime**

550 W. Jackson Blvd.  
Suite 800  
Chicago, IL 60661  
312 568-8000  
[www.showingtime.com](http://www.showingtime.com)

ShowingTime removes inefficiencies in the showing appointment scheduling, showing feedback and market stats reporting process for associations, MLSs, offices and agents, resulting in more showings and quicker sales.

## **Supra**

4001 Fairview Industrial Drive  
Salem, OR 97302  
800 547-0252  
[www.supraekey.com](http://www.supraekey.com)

Supra is a leading electronic key and keybox provider, delivering real-time showing notifications, mobile productivity tools, and activity reports that help create sales opportunities.

## **Training4RE.com**

430 North Michigan Avenue  
Chicago, IL 60611  
312 329-8488  
[www.training4RE.com](http://www.training4RE.com)

Developed exclusively for REBAC course providers, training4RE.com serves as the online resource for real estate professionals looking for NAR designation or certification courses in their area. Earn non-dues revenue by hosting courses such as the Accredited Buyer's Representative (ABR®) Designation Course or NAR'S Green Designation Course.

## **VESTAPLUS™, Powered By The MLS™**

8350 Wilshire Blvd.  
1st Floor  
Beverly Hills, CA 90211  
310 358-1100

VESTAPLUS™ is the groundbreaking new MLS system, designed based on the feedback of thousands of agents and brokers.

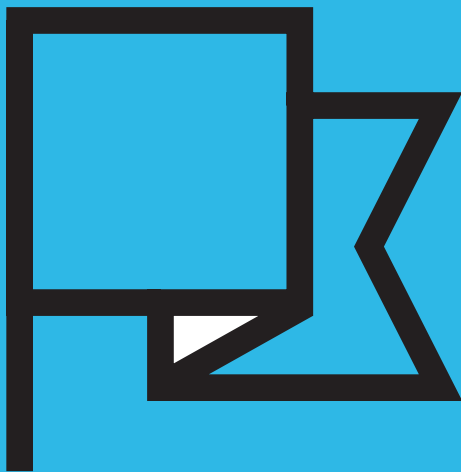
## **zipLogix™**

18070 15 Mile Road  
Fraser, MI 48026  
866 693-6767  
[www.zipLogix.com](http://www.zipLogix.com)

The NAR Transaction Management Benefit provided to REALTORS® nationwide through zipLogix™ includes zipTMS® robust transaction management system, unlimited zipVault® document storage and the industry-standard zipForm® Plus forms engine.



# Empower your members to succeed online.



Most home buyers start their search online, that's why a strong digital presence is crucial. Encourage your members to increase their visibility online with a **.realtor™** web and email address.

**Stop by for more information on how your members can benefit from a .realtor™ web and email address!**

## OUR LOCATION

The .realtor™ Resource Table  
Westin Charlotte Hotel  
Grand Ballroom Promenade Foyer, Level 2



### **FREE\* for Members for Their First Year**

Promote **.realtor™** to your members in newsletters and internal communications through ready-to-download email templates and digital banners. With their **.realtor™** domain, members receive access to free website options and digital tools for their business.

Learn more at [www.get.realtor/AE118](http://www.get.realtor/AE118)

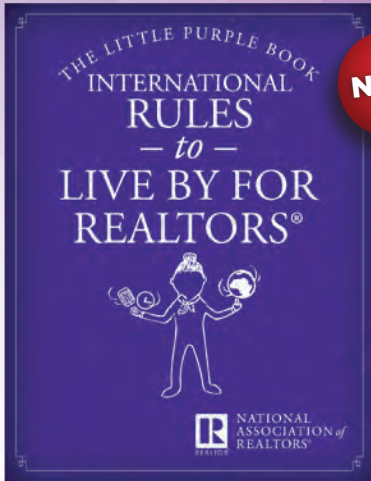
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\*Free for the first year one per member.

 NATIONAL ASSOCIATION of REALTORS®

# NEW PRODUCTS

TO HELP YOUR MEMBERS LEARN & THRIVE



**NEW!**

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Part of the "LITTLE BOOK" Series.  
Buy all four together and **save 10%**

**Housing Point:  
Fair Housing Act Video Download**

Commemorate the 50th Anniversary of the Fair Housing Act (FHA) with this updated video.

**NEW!**



**SPIN TO WIN!**



STOP BY THE REALTOR® STORE RESOURCE TABLE TO SPIN OUR DIGITAL PRIZE WHEEL — YOU COULD WIN A FREE PRODUCT OR A \$150 REALTOR® STORE COUPON!

[WWW.NAR.REALTOR/STORE](http://WWW.NAR.REALTOR/STORE)

**EARN NON-DUES REVENUE WITH MVP AT AEI**

Visit our resource table to join the Association Revenue Track (ART) Program and start earning non-dues revenue for your association, plus other rewards that benefit you and your members.



[WWW.NAR.REALTOR/MVPAE](http://WWW.NAR.REALTOR/MVPAE)

