



# aei

## Austin, Texas

2019 Association Executives Institute  
March 29 – April 1

## PROGRAM

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Creators of zipForm®

*Official Sponsor of the 2019  
Association Executives Institute*



NATIONAL  
ASSOCIATION of  
REALTORS®

# Welcome to Austin!



Visit **NAR's Resource Table** for tools and resources  
to help you communicate the value of membership!  
JW Marriott – 3rd Floor Foyer

Stop by to learn more about these exciting programs!

## Association Resource Packet at the REALTOR® Store

Save 10% on REALTOR® Store purchases, including the 2019 Association Resource Packet, which includes 50 copies each of the Top Benefits flyer and Catalog of Member Resources.  
[store.realtor/resource](http://store.realtor/resource)



## .realtor™ + .realestate Top Level Domains

Learn how your members can power their real estate business with .realtor™ and .realestate top-level domains—designed to support them and everything they do.  
[get.realtor](http://get.realtor)



## 2019 Orientation Resources

Access NAR's Orientation Toolkit, including the new member video, and learn about the Online Orientation National Module.  
[nar.realtor/orientation](http://nar.realtor/orientation)



## Consumer Ad Campaign

Hear about the new "That's Who We R®" consumer advertising campaign materials for members and associations, and pick-up a free poster for your office.  
[ThatsWhoWeR.realtor](http://ThatsWhoWeR.realtor)

THAT'S  
WHO  
WE



## REALTOR® Safety

Download safety resources to share with your members, and apply for a 2019 REALTOR® Safety Reimbursement Grant.  
[nar.realtor/safety](http://nar.realtor/safety)



## Commitment to Excellence

Give your members a competitive advantage with C2EX, a new program that empowers REALTORS® to evaluate, enhance and showcase their high level of professionalism.  
[C2EX.realtor](http://C2EX.realtor)



## Center for REALTOR® Financial Wellness

Help your members achieve financial security with this robust online program created specially to meet the financial planning needs of REALTORS®.  
[financialwellness.realtor](http://financialwellness.realtor)



NATIONAL  
ASSOCIATION of  
REALTORS®

## Dear Fellow Association Executives,

On behalf of the entire AE Institute Advisory Board, welcome to Austin, Texas – the “Live Music Capital of the World!” We couldn’t be more excited about what’s in store for you over the next few days. The Advisory Board and NAR staff team has been hard at work for the past nine months planning exciting professional development sessions and creating fun, engaging activities for you to enjoy. We are committed to delivering an enhanced attendee experience at this year’s event!

The future of the real estate industry and our ability to continually deliver exceptional member value is fully dependent on our collective ability to innovate and collaborate. That’s why we are introducing a brand-new session track called “Innovation and Collaboration.” In this track you’ll learn: how your peers are leveraging technology innovations to enhance member experiences; how your members can capitalize on global real estate opportunities through your association; how different brokerage business models impact the market and your members; and much, much more.

We are also offering exciting sessions on the topics you’ve come to expect at AEI, like leadership and professionalism, association governance, communications and advocacy, member engagement and customer service. For those newer AEs, or seasoned AEs who want a refresher, we have the “AE Fundamentals” track to sharpen your foundational knowledge, and we’re bringing back a live Legal Update with NAR General Counsel Katie Johnson.

And, for the first time, you’ll hear directly from members about how AEs can best serve them at our featured Broker Panel discussion facilitated by Stefan Swanepoel. We’re also thrilled to bring you our keynote speaker, Kat Cole, COO and President of FOCUS Brands North America (think Cinnabon, Auntie Anne’s Pretzels, Jamba Juice) to provide insight on what it takes to lead successful teams, drive innovation and growth, lead with the heart, and sustain excellence.

We’d like to give a special ‘shout out’ to the Texas REALTORS®’ outstanding commitment and support of AEI. When you see them in sessions and in the halls, please go out of your way to thank them.

We hope you are as excited as we are to be in Austin and to learn from and have fun with hundreds of your peers from across the country!

Sincerely,



Ryan T. Conrad, RCE, CAE, CIPS  
Dean, 2019 Association Executives Institute

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## Registration Hours

### JW Grand Ballroom Foyer, Level 4

Thursday, March 28	5:30 p.m. – 8:30 p.m.
Friday, March 29	7:30 a.m. – 5:30 p.m.
Saturday, March 30	7:30 a.m. – 5:30 p.m.
Sunday, March 31	8:00 a.m. – 3:00 p.m.

### Information Desk

Monday, April 1	8:00 a.m. – 12:00 p.m.
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# AE Institute Advisory Board



**Chip Ahlswede, RCE**  
Chief Executive Officer  
Beverly Hills/Greater Los  
Angeles Association of  
REALTORS® (CA)



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



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



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



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



**Kathy Condon**  
Chief Executive Officer  
MLS Property Information  
Network (MA)



**Katie Shotts, RCE**  
Chief Executive Officer  
Memphis Area Association of  
REALTORS® (TN)



**John Seebree, RCE**  
Vice Chair, Association  
Executives Committee  
Chief Executive Officer  
Missouri REALTORS®



**Dave Garrison, RCE,  
CAE, CIPS**  
Vice President, Finance,  
Professional Development,  
and Internal Operations  
Florida REALTORS®



**Andrew Sims, RCE**  
Chief Executive Officer  
Dayton REALTORS® (OH)



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



**Beth Hansen, RCE, CAE**  
Chief Executive Officer  
Mississippi Association of  
REALTORS®



**Shanna Terroso, RCE**  
Chief Executive Officer  
REALTORS® Association of  
York & Adams Counties (PA)



**Jim Haisler, RCE, CIPS**  
Vice Chair, AE Institute  
Advisory Board  
Chief Executive Officer  
Heartland REALTOR®  
Organization (IL)



**Jeff Lasky**  
Chief Executive Officer  
Midwest Real Estate Data (IL)



**Breanna Vanstrom, RCE**  
Chief Executive Officer  
Boise Regional REALTORS®  
(ID)

## NAR PAVILION

*Lone Star Foyer, Level Three*

**Saturday, March 30, 7:30 a.m. – 4:30 p.m.**  
**Sunday, March 31, 10:30 a.m. – 3:30 p.m.**

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

REALTOR Benefits® Program Partners in  
**Yellow**

NAR Strategic Investment Companies in  
*Italics*

Association Leadership Development (ALD)

Center for REALTOR® Development/REBAC

*DocuSign*

NAR Library and Archives

NAR Resources

(.realtor™, .realestate™, Commitment  
to Excellence, Center for REALTOR®  
Financial Wellness, and more)

NRDS & E-Commerce

REALTOR® Store & MVP

RAMCO

Real Estate Today Radio

**REALTORS® Insurance Marketplace**

*realtor.com®*

Realtors Property Resource® (RPR®)

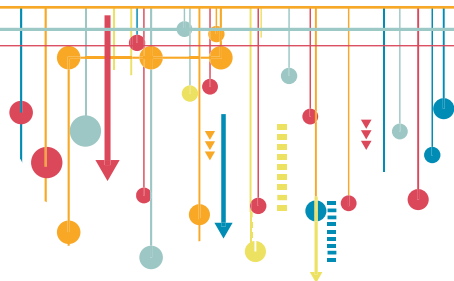
**REALTOR Team Store®**

*SentriLock*

Strategic Association Management

*zipLogix™*





## 2018 RCEs

### **Brendan Bailey, RCE**

Raleigh Regional Association of REALTORS®, NC

### **Kyla Barcus, RCE**

Kansas City Regional Association of REALTORS®, KS

### **Laurie Benner, RCE**

Maryland REALTORS®

### **David Bennett, RCE, CAE**

Pinellas Suncoast Association of REALTORS®, FL

### **Amanda Brewer, RCE**

Kansas City Regional Association of REALTORS®, KS

### **Page Browning, RCE, CAE**

Coastal Association of REALTORS®, MD

### **Lisa Calarco, RCE**

National Association of REALTORS®

### **Elizabeth Campbell-Hensley, RCE**

Burke County Board of REALTORS®, NC

### **Crystal Castle, RCE**

Yakima Association of REALTORS®, WA

### **Erin Corry, RCE**

West Volusia Association of REALTORS®, FL

### **Lauren Daniel, RCE**

Athens Area Association of REALTORS®, GA

### **Jessica Dietrich, RCE**

Oklahoma Association of REALTORS®

### **Frank Doyle, RCE, CAE**

Northern Virginia Association of REALTORS®

### **Lorri Edwards, RCE**

Columbus Board of REALTORS®, GA

### **Joe Farrell, RCE**

Pinellas Suncoast Association of REALTORS®, FL

### **Robert Friday, RCE**

Bay Area Association of REALTORS®, MD

### **Marta Golding Brown, RCE**

Ventura County Coastal Association of REALTORS®, CA

### **Deb Haines-Kulick, RCE**

Clarksville Association of REALTORS®, TN

### **Vicki Heebner, RCE**

Ocean City Board of REALTORS®, NJ

### **Elizabeth Hiett, RCE**

Newnan-Coweta Board of REALTORS®, GA

### **Sheree Higgins, RCE**

Carteret County Association of REALTORS®, NC

### **Beverly Hinkle, RCE**

Cullman Association of REALTORS®, AL

### **Kenneth Hogan, RCE**

Abilene Association of REALTORS®, TX

### **Steve Huffman, RCE**

Tucson Association of REALTORS®, AZ

### **Alan Jeffries, RCE**

Southwestern Michigan Association of REALTORS®

### **JoAnn Johnston, RCE**

Clark County Association of REALTORS®, WA

### **Beate Jones, RCE**

Royal Palm Coast REALTOR® Association, FL

### **David Kissinger, RCE**

South Bay Association of REALTORS®, CA

### **Leah Krnjaic, RCE, CAE**

Pennsylvania Association of REALTORS®

### **Kimberley Lambert, RCE**

Greater Lewisville Association of REALTORS®, TX

### **Justin Landon, RCE**

Lexington-Bluegrass Association of REALTORS®, KY

### **Shay Lawson, RCE**

Tuscaloosa Association of REALTORS®, AL

### **Debbie Leber, RCE**

Mid Shore Board of REALTORS®, MD

### **Shauna Marie Love, RCE**

Tuolumne County Association of REALTORS®, CA

### **Michael McGee, RCE, CAE**

Pennsylvania Association of REALTORS®

### **Misty Miller, RCE**

Ashland Board of REALTORS®, OH

### **Kendra Murray, RCE**

Incline Village REALTORS®, NV

### **Kristin Nash, RCE**

North Carolina REALTORS®

### **Miles Noennig, RCE**

Greater Springfield Board of REALTORS®, MO

### **Jesse Payne, RCE**

Solono Association of REALTORS®, CA

### **Sheila Rumsey, RCE**

REALTORS® of South Central Kansas

### **Heather Schiffman, RCE**

Contra Costa Association of REALTORS®, CA

### **Joe Schneider, RCE**

National Association of REALTORS®, IL

### **Jamie Sergen, RCE**

Lee County Association of REALTORS®, AL

### **Grace Smith, RCE**

Greater Tampa REALTORS, FL

### **Jarron Springer, RCE, CAE**

Greater Nashville REALTORS®, TN

### **Kelli Walker Starrett, RCE**

New Orleans Metropolitan Association of REALTORS®, LA

### **Brent Swander, RCE**

Columbus REALTORS®, OH

### **April Thomas, RCE**

Prince William Association of REALTORS®, VA

### **Caitlin Thompson, RCE**

North Carolina REALTORS®

### **Steve Trine, RCE**

Metrotex Association of REALTORS®, TX

### **Missy Vanderpool, RCE**

Henderson Audubon Board of REALTORS®, KY

### **Meghan Webber, RCE**

Greater Lansing Association of REALTORS®, MI

### **Liz Wolf, RCE**

Columbia Board of REALTORS®, MO

### **Jennifer Zeller, RCE**

Dayton REALTORS®, OH

# CONGRATULATIONS!

# Special Events

## At-A-Glance

### Friday, March 29

#### AE Institute Welcome Lounge

**5:00 p.m. – 6:30 p.m. | Lone Star Salon C, Level 3**

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

*Sponsored by: Texas REALTORS® and the Austin Board of REALTORS®, TX*

#### AE Young Professional Network (YPN) Meet Up

**6:30 p.m. – 8:00 p.m. | Iron Cactus, 606 Trinity Street**

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

### Saturday, March 30

#### RCE Apparel Day

**Saturday, March 30**

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

#### New AE Networking Breakfast

**7:45 a.m. – 8:45 a.m. | Lone Star Salon C, Level 3**

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

#### Continental Breakfast

**7:30 a.m. – 8:45 a.m. | Lone Star Foyer, Level 3**

*Sponsored by: SEI/NAVICA MLS*

#### Opening Session

**9:00 a.m. – 10:00 a.m. | JW Grand Ballroom, Level 4**

The Opening Session is the official kick-off to the 2019 AE Institute. Come and meet the AEI team, and learn a little more about what went into making the 2019 AE Institute. You'll also hear from 2019 NAR President John Smaby, who'll offer some special remarks.

*Sponsored by: realtor.com®*

#### REALTOR® Party Luncheon

**12:30 p.m. – 1:45 p.m. | JW Grand Ballroom, Level 4**

Come hear what's going on in the political arena and be entertained in the process. Join Matthew Dowd and Doug Sosnik as they share their perspectives on the state of American politics today and what lies ahead for the 2020 elections. Matthew Dowd, an American political consultant, was the chief strategist for the Bush-Cheney 2004 Presidential campaign. His political career has spanned from US Representative Dick Gephardt's office to Senator Lloyd Bentsen's campaign, to senior advisor to the Republican National Committee. Currently, he is an ABC political analyst. Doug Sosnik served as a senior advisor to President Bill Clinton for six years and played a key role in the policy, strategy and communication decisions made during the Clinton administration. His vast experiences allow him to advise prominent clients on leadership, adaptability, crisis management and strategic planning. Currently he serves as an NAR political consultant.

*Sponsored by: REALTOR® Party*

#### State Chief Staff Meeting

**2:00 p.m. – 3:30 p.m. | Brazos, Level 2**

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

#### Keynote Address with Kat Cole

**4:15 p.m. – 5:15 p.m. | JW Grand Ballroom, Level 4**

Join us as we welcome keynote speaker Kat Cole, COO and President, FOCUS Brands North America, a leading developer of iconic food service brands around the globe (think Cinnabon, Auntie Anne's Pretzels, Jamba Juice). She has made her mark in franchising, business leadership, and brand building with a servant leader mindset, approachable style, penchant for business model innovation, and ability to build flexible, entrepreneurial-minded teams that love what they do and drive strong financial results. Kat provides insight and perspective on what it takes to create and lead successful teams, drive innovation and growth, lead with the heart, and sustain excellence.

#### Icebreaker Reception

**5:30 p.m. – 8:30 p.m. | Austin City Limits**

Join your friends and colleagues for this special Institute welcome reception at Austin's very own Austin City Limits. Come and renew old friendships and create new ones in a unique environment that will entertain and show everyone a glimpse into Austin's passion — music!

*Sponsored by SUPRA, Texas REALTORS®, and the following local associations in Texas: Austin Board of REALTORS®, Central Texas MLS, Collin County Association of REALTORS®, HAR.com, Lubbock Association of REALTORS®, North Texas Real Estate Information Systems, Inc*



## Sunday, March 31

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### RCE Overview and ADF Workshop

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**8:00 a.m. – 8:45 a.m. | Lone Star Salon E, Level 3**

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

### The Member Experience Rocks Featuring Bob and His Band

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**9:00 a.m. – 10:30 a.m. | JW Grand Ballroom, Level 4**

Join NAR CEO Bob Goldberg and his senior leadership team, 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

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**12:30 p.m. – 1:15 p.m. | Griffin Hall Foyer, Level 2**

Grab a sandwich and a drink and head to a networking roundtable, offer some time to Caritas of Austin (the AEI charity project), 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 and Rapattoni*

### Networking Roundtables

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**12:45 p.m. – 2:00 p.m. | Griffin Hall, Level 2**

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

### AE Institute Charity Project – Caritas of Austin

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**12:45 p.m. – 2:00 p.m. | Griffin Hall, Level 2**

The AEI Advisory Board is working with a local organization, Caritas of Austin, to assemble first-aid kits and rice and bean kits. Caritas of Austin's mission is to prevent and end homelessness for people in Greater Austin. Caritas does this through a variety of programs including food services, educational sessions, job placement, veteran assistance and more, to "make homelessness rare, brief and nonrecurring in Central Texas."

## NAR Issues Update

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**3:30 p.m. – 4:30 p.m. | JW Grand Ballroom, Level 4**

Come hear updates on the latest NAR initiatives, including what's happening with membership data, the Governance PAG, Commitment to Excellence (C2EX), and more. NAR subject matter experts will make sure you have the latest information to share with your members in advance of the REALTORS® Legislative Meetings in May.

## Monday, April 1

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### Continental Breakfast

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**7:30 a.m. – 8:45 a.m. | JW Grand Ballroom Foyer, Level 4**

*Sponsored by: Real Safe Agent*

### A Broker's Perspective

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**9:00 a.m. – 10:30 a.m. | JW Grand Ballroom, Level 4**

Facilitator: Stefan Swanepoel, Chairman & CEO, T3 Sixty LLC, San Juan Capistrano, CA

Panelists: Jonathan Boatwright, CEO, Realty Austin, Austin, TX; Mark Choey, Co-Founder, Climb Real Estate, San Francisco, CA; Sherry Chris, President and CEO, Better Homes and Gardens Real Estate, Madison, NJ

Industry legend, Stefan Swanepoel, moderates a panel to dig deep into the minds of brokers to learn the secret to their success and how REALTOR® associations and MLSs can be a trusted partner in their continued success. Stefan will ask the tough questions to uncover what our members really think in this hard-hitting approach to finding our value.

### Lunch and Legal Update

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**12:00 p.m. – 1:30 p.m. | JW Grand Ballroom, Level 4**

Katie Johnson, General Counsel and Chief Member Experience Officer, NAR

Join NAR General Counsel Katie Johnson for an update on the legal issues impacting REALTOR® associations across the country. There will also be time for Q&A.

*Buffet lunch service is sponsored by CCIM.*

### Economic Update

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**1:30 p.m. – 2:30 p.m. | JW Grand Ballroom, Level 4**

Lawrence Yun, Chief Economist and Senior Vice President, Research, NAR

Join NAR Chief Economist Lawrence Yun for a look into real estate's economic future. There will also be time for Q&A.

# AE Fundamentals Sessions

## Saturday, March 30

### Crash Course for New AEs

**11:30 a.m. - 12:15 p.m. | Room 303/304, Level 3**

Tessa Hultz, RCE, CAE, CIPS, SRES, CEO, Long Island Board of REALTORS®, NY

There is a lot for new AEs to know in their first year on the job, but it doesn't have to be overwhelming. Take a high-speed tour of tips, tricks, and resources to help AEs make their first year in REALTOR® association management a success!

### NAR Policy 101

**2:00 p.m. - 3:00 p.m. | Room 303/304, Level 3**

Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Member Experience, 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 compliance with NAR policy, Code of Ethics training, online resources, and other "need-to-know" information to understand this key component of REALTOR® association management.

### Core Standards 101

**3:15 p.m. - 4:00 p.m. | Room 303/304, Level 3**

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

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 2019 certification, and take away a few tips and tricks to make the certification process run smoothly for you and your association.

## Sunday, March 31

### NAR Dues Policies and Dues Remittance Procedures

**10:45 a.m. - 11:30 a.m. | Room 303/304, Level 3**

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Director, Dues Compliance and REALTORS® Relief Foundation Services, 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.

### NRDS and E-Commerce

**2:15 p.m. - 3:15 p.m. | Room 303/304, Level 3**

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

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

*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.*

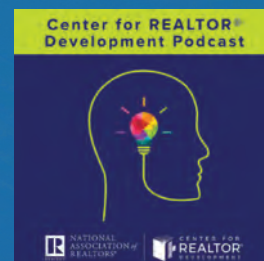
## 2019 AE Institute App

The 2019 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. Use the app to view and bid on silent auction items, submit questions during sessions labeled with a "Q&A" feature, and NEW this year - earn points by performing in-app tasks for a chance to win a Tundra 35 YETI® Hard Cooler! Tap "Earn Points" in the app for more information.

#NARAEI2019 [www.nar.realtor/AElapp](http://www.nar.realtor/AElapp)

The 2019 AE Institute App  
is sponsored by:





# Educational And Special Events

## Friday, March 29

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

**8:00 a.m. - 5:00 p.m. | Lone Star Salon F, Level 3**

Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, RCE, Director, Training and Policy Resources, Member Experience, 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.

### Data Privacy: Protecting Your Clients and Your Business - (\$75 - includes lunch)

**8:30 - 4:30 p.m. | Room 303/304, Level 3**

Terry Watson, Speaker, Trainer, Coach, Easify, Inc., Chicago, IL

Data privacy and security are changing at an accelerated pace. Are you and your members up to speed? This course addresses the importance of data privacy and security as well as how to develop data policies and procedures. It also examines legal responsibilities created by a data breach. After taking this course, attendees will receive a discount on the online version of the full course in order to complete NAR's e-PRO® certification.

### Global Programs for Associations - (\$75)

**8:30 a.m. - 12:30 p.m. | Room 307, Level 3**

Lisa Calarco, Manager, Global Programs & Outreach, Engagement, NAR

Gain in-depth education on developing and growing global member programs to help your members succeed in the global marketplace, and learn how to connect your association to the larger global business community. This course earns points toward the RCE designation and Core Standards, as well as being a required course for staff wanting to earn the CIPS designation. To learn more about global councils, visit <https://www.nar.realtor/global/global-business-councils>

### Develop Your Association's Advocacy Plan and Meet Your Core Standards (includes lunch)

**9:00 a.m. - 3:00 p.m. | JW Grand Ballroom 3 - 4, Level 4**

NAR Advocacy Staff Experts

Do you have limited staff time and resources? Does meeting your Advocacy Core Standards requirements seem daunting? Join NAR Advocacy staff as they demystify the process by identifying programs, tools, and services that will help you reach your association advocacy goals. Lunch is provided. This session awards credit toward your Core Standards.

### CMLS Best Practices

**9:00 a.m. - 4:00 p.m. | Brazos, Level 2**

Provided by the Council of Multiple Listing Services (CMLS), this one-day workshop opens with the recently published "CMLS Leadership and Governance Survey" and features how this data and other best-practice documents are shaping improvements in the MLS industry. Take the challenge to adopt the recently updated *CMLS Best Practices* to assess and enhance your organization.

### CEO Program (\$225 - pre-registration required)

**1:00 p.m. - 5:00 p.m. | Lone Star Salon E, Level 3**

Robert Richman, former culture strategist at Zappos and leader of its Insights Division (the Zappos company that trains other companies on world class customer service and culture) will share insights that cover your role as a CEO and as a team player. He'll talk about the culture-driven way to implement outcomes and key results; the way values actually work beyond words on a wall; the agile way to form and organize teams; and more.

### Commercial Resources for Associations 101 - (\$75)

**1:00 p.m. - 4:30 p.m. | Room 308, Level 3**

Jean Maday, Director of Engagement & Commercial Strategy, Engagement, NAR

This course will educate you on how to identify your commercial practitioners, what they want from your association, and how you can engage and serve them. Come away with tools to implement commercial services, grow membership and serve your entire real estate community.

Learn about software exclusively  
for Real Estate Associations.



Chris Philen, Account Executive | 800.825.9171 ext. 273



## AE Institute Programming Tracks

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

### INNOVATION AND COLLABORATION

Sponsored by



### LEADERSHIP/PROFESSIONALISM/ ASSOCIATION GOVERNANCE

Sponsored by



### MARKETING/COMMUNICATION/ ADVOCACY

Sponsored by



### MEMBER ENGAGEMENT AND CUSTOMER SERVICE

Sponsored by



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.

## Daily Schedule

Friday, March 29

### Certified Professional Standards Administration

**8:00 a.m. - 5:00 p.m. | Lone Star Salon F, Level 3**

### Data Privacy: Protecting Your Clients and Your Business

**8:30 a.m. - 4:30 p.m. | Room 303/304, Level 3**

### Global Programs for Associations

**8:30 a.m. - 12:30 p.m. | Room 307, Level 3**

### Develop Your Association's Advocacy Plan and Meet Your Core Standards

**9:00 a.m. - 3:00 p.m. | JW Grand Ballroom 3 - 4, Level 4**

### CMLS Best Practices

**9:00 a.m. - 4:00 p.m. | Brazos, Level 2**

### CEO Program (pre-registration required)

**1:00 p.m. - 5:00 p.m. | Lone Star Salon E, Level 3**

### Commercial Resources for Associations 101

**1:00 p.m. - 4:30 p.m. | Room 308, Level 3**

### AE Institute Welcome Lounge

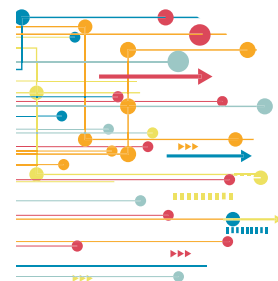
**5:00 p.m. - 6:30 p.m. | Lone Star Salon C, Level 3**

*Sponsored by: Texas REALTORS® and the Austin Board of REALTORS®, TX*

### AE Young Professional Network (YPN) Meet Up

**6:30 p.m. - 8:00 p.m. | Iron Cactus, 606 Trinity Street**

*Thank you to all who donated from the Amazon Wish List to Caritas of Austin. Join us Sunday, March 31<sup>st</sup>, from 12:45 - 2 p.m., to compile the donated items to be handed out to those that Caritas of Austin serves.*



# Daily Schedule

Saturday, March 30



RCE Apparel Day

## Continental Breakfast

**7:30 a.m. - 8:45 a.m. | Lone Star Foyer, Level 3**

*Sponsored by: SEI/NAVICA MLS*

## New AE Networking Breakfast

**7:45 a.m. - 8:45 a.m. | Lone Star Salon C, Level 3**

## Opening Session

**9:00 a.m. - 10:00 a.m. | JW Grand Ballroom, Level 4**

*Sponsored by: realtor.com®*

## Virtual Classrooms: Educate Members Beyond the Association Walls

*INNOVATION AND COLLABORATION*

**10:15 a.m. - 11:15 a.m. | Lone Star Salon C, Level 3**

Facilitator: Jon Houser, RCE, Associate Director of Professional Development, Texas REALTORS®

Panelists: Brent Lancaster, ABR, AHWD, BPOR, e-PRO, GRI, MRP, SRS, President, Brent Lancaster & Associates, Baton Rouge, LA; Candy Cooke, ABR, AHWD, BPOR, CIPS, CRB, e-PRO, GAA, GREEN, GRI, MRP, RENE, RSPS, SFR, SRES, SRS, Senior Instructor, Real Property Counselors, Inc., Round Rock, TX

Discover how to reach members who live in hard-to-reach places and how to collaborate with other associations to offer high-quality professional development opportunities that may otherwise be unobtainable. Explore two existing and successful models that can be easily implemented anywhere. Embrace new technology to provide a classroom experience in a cost-efficient manner and change your association's education culture.

## No Hitting Allowed! Negotiate Anything With Anyone at Any Time

*LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE*

**10:15 a.m. - 11:15 a.m. | Lone Star Salon D, Level 3**

Joanne Chando, ABR, AHWD, BPOR, CIPS, GREEN, GRI, MRP, RSPS, SFT, SRES, SRS, Chief Edutainment Officer, Joanne Chando Productions, Fort Myers, FL

This lively and interactive program will teach you to understand your dominant personality type, quickly identify it in others, and effectively manage any situation to a successful outcome.

## From Hurricanes to Daily Fires: Power Productivity for AE Leaders

*MARKETING/COMMUNICATION/ADVOCACY*

**10:15 a.m. - 11:15 a.m. | Lone Star Salon E, Level 3**

Beth Ziesenis, Author/Speaker, Your Nerdy Best Friend, San Diego, CA

You love your work as an AE leader, but keeping on top of everything is exhausting! The right technology can give you back your time and your sanity. This critical session will share

apps and technology strategies to help your REALTOR® association work through everything from natural disasters to personal safety and health concerns. This is not a risk assessment session; it's a nerd-preparedness conversation. Let your Nerdy Best Friend impart the perfect tools upon you to manage it all.

## The Power of Experience

*MEMBER ENGAGEMENT AND CUSTOMER SERVICE*

**10:15 a.m. - 11:15 a.m. | Lone Star Salon F, Level 3**

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

Create exceptional service experiences that are tailored to your members and build loyalty. We operate in an experiential economy where providing excellent customer service is dependent upon our ability to create delightful service experiences. Learn how to gather and analyze relevant membership data that you can turn into the foundation of systemic excellence at all levels of the association.

## What Is the RESO Web API and What's in It for Me?

*INNOVATION AND COLLABORATION*

**11:30 a.m. - 12:15 p.m. | Lone Star Salon C, Level 3**

Troy McCasland, CEO, AgentSquared, La Jolla, CA

Gain an understanding of the RESO Web API and the benefits it creates for everyone touched by our industry -- consumers, REALTORS®, associations, and MLSs. Learn how MLSs around the country have implemented the Web API for data distribution and understand the value of real-time updates, faster and cheaper website property searches, risk reduction, and cost savings for MLSs.

## Succeed With the Seven Leadership Prescriptions for Success

*LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE*

**11:30 a.m. - 12:15 p.m. | Lone Star Salon D, Level 3**

Mary Kelly, PhD, CSP, Commander, US Navy (ret), CEO of Productive Leaders, Monument, CO

What do employees and association members need that they are not getting from their leadership? In this highly entertaining, high-energy, and high-content program, Mary shares how we can succeed in leading our associations, chapters, and members. Using real estate and military scenarios as examples, Mary shows audiences how to be even better leaders. Best-selling author of *Master Your World*, *15 Ways to Grow Your Business in Every Economy*, *Money Smart*, and *Why Leaders Fail* and *The 7 Prescriptions for Success*, Mary Kelly knows the challenges we have today and can help us succeed through them.



## Advance Members' Online Presence and Build Their Success

MARKETING/COMMUNICATION/ADVOCACY

### 11:30 a.m. - 12:15 p.m. | Lone Star Salon E, Level 3

Shawn Hanna, Senior Director of Technology Initiatives, Northern Virginia Association of REALTORS®, VA

Now more than ever, members must understand what building and nurturing their online presence really means, so that consumers can find them, like them, and eventually trust them. Many members don't realize that they can improve their online presence through an entire set of benefits and free services available through their REALTOR® association membership. Learn about these valuable tools and how you can best share them with your members.

## Say It With a Picture!

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

### 11:30 a.m. - 12:15 p.m. | Lone Star Salon F, Level 3

Michele Sloan, ABR, AHWD, CRS, e-PRO, SRES, SRS, Owner, Michele Sloan, O'Fallon, MO

They are cute and fun to use, but don't be fooled. Emoji is changing the way we communicate. With 90% of social media users interacting with emojis, it's time to climb on board and discover ways emoji can increase member engagement. Get ready for emoji-mania!

## Crash Course for New AEs

### 11:30 a.m. - 12:15 p.m. | Room 303/304, Level 3

Tessa Hultz, RCE, CAE, CIPS, SRES, CEO, Long Island Board of REALTORS®, NY

See page 8 for session description.

## REALTOR® Party Luncheon

### 12:30 p.m. - 1:45 p.m. | JW Grand Ballroom, Level 4

Sponsored by: REALTOR® Party

## NAR's Association Investment Program - One on One Sessions

### 1:00 p.m. - 4:00 p.m. | Room 401, Level 4

## State Chief Staff Meeting

### 2:00 p.m. - 3:30 p.m. | Brazos, Level 2

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

## Perception vs. Reality: Real Results of Going Global

INNOVATION AND COLLABORATION

### 2:00 p.m. - 3:00 p.m. | Lone Star Salon C, Level 3

Facilitator: Steve McDonald, Director of Professional Development, Tennessee REALTORS®

Panelists: Andrea Bushnell, RCE, CEO, North Carolina REALTORS®; Donna Wilson, Director, Global & Commercial Business, Mainstreet Organization of REALTORS®, IL

Global isn't a niche anymore; it's a major economic driver in all size markets. In this session, Global Council representatives from Tennessee, North Carolina, and Illinois share how adopting a global mindset brought new business opportunities to their associations, members, and communities.

## After the Honeymoon: Overcome the Challenges of MLS Consolidation

LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE

### 2:00 p.m. - 3:00 p.m. | Lone Star Salon D, Level 3

Facilitator: Bill Lublin, CEO, Social Media Marketing Institute, Philadelphia, PA

Panelists: Carl DeMusz, RCE, e-PRO, President and CEO, Yes-MLS, Independence, OH; Dionna Brahs Hall, RCE, CEO, REALTOR® Association of the Palm Beaches and Ft. Lauderdale, FL; Brian Donnellan, Interim CEO, Bright MLS, Rockville, MD

As MLS mergers remain the focus of MLS executives and members around the country, it is important to look at the unexpected issues that the merged MLS entities face. This panel of well-known and respected MLS executives will share the challenges that arose after the decision to merge, how those challenges impacted the merger, and how the new MLS met those challenges, or possibly fell short.

## RPR's Game-Changing Tools for Associations

MARKETING/COMMUNICATION/ADVOCACY

### 2:00 p.m. - 3:00 p.m. | Lone Star Salon E, Level 3

Karen France, Senior Vice President, Market Engagement, RPR; Karen Becker, RCE, AHWD, CIPS, CEO, Southeast Minnesota REALTORS®; Andrew Sims, RCE, CEO, Dayton REALTORS®, OH

Learn how RPR's market data tools and economic area reports equip AEs with invaluable market information to get a seat at the table for economic development activities in their communities. This session includes case studies from two local associations and a tutorial that demonstrates how to access and set these resources up for yourself.

# Daily Schedule

**Saturday, March 30** (continued)

## Members Beyond REALTORS®

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

### 2:00 p.m. – 3:00 p.m. | Lone Star Salon F, Level 3

Facilitator: Cynthia DeLuca, ABR, CIPS, GRI, SFR, SRS, President, TRC, DeLand, FL

Panelists: Dave Stefanides, CEO, Orange County REALTORS®, CA; Eliezer Rodriguez, CEO, Bronx Manhattan North Association of REALTORS®, NY; David Bennett, RCE, CAE, President and CEO, Pinellas REALTOR® Organization, FL

As the local association feels the heat of MLS changes, it's time to embrace other areas of membership growth and sustainability. If you haven't tapped into your affiliate members lately, maybe it's time you do. Diversify with an expanded affiliate outreach program that shows them you care and why their association dues offer such a high return on their investment.

## NAR Policy 101

### 2:00 p.m. – 3:00 p.m. | Room 303/304, Level 3

Christopher Harrigan, RCE, e-PRO, Manager, Policy Information, Member Experience, NAR

See page 8 for session description.

## Collaborate to Create Economic Vitality in Your Community

INNOVATION AND COLLABORATION

### 3:15 p.m. – 4:00 p.m. | Lone Star Salon C, Level 3

Christopher Reese, Associate Vice-President, University Affairs and Government Relations, California State University, Long Beach, CA

Students are graduating from local colleges with a desire to stay in those communities, but can't afford to do so. Workers at all levels are struggling to meet the qualifications necessary to purchase homes near their jobs. A lack of available housing options prevents expanding businesses from attracting top talent. Come see how your association can adopt creative models to tie business, education, and public-sector leaders together to ensure economic vitality, and at the same time turn them into your biggest housing-issue advocates.

## Association Direction: Be BOLD or Be Forgotten

LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE

### 3:15 p.m. – 4:00 p.m. | Lone Star Salon D, Level 3

Justin Schlegel, Owner/REALTOR®, RHP Real Estate - Team Schlegel, Peoria, AZ

Dig deep internally to define what got your association to where it is at today. Determine what's missing from the team, find the fun again, and dare to dream about what could be. Then challenge the status quo to realize an association vision that's closer than you think.

## REALTOR® Party: What's in It for Me?

MARKETING/COMMUNICATION/ADVOCACY

### 3:15 p.m. – 4:00 p.m. | Lone Star Salon E, Level 3

John Smaby, President, NAR; Tracy Kasper, Vice President of Advocacy, NAR; Christine Hansen, REALTOR® Party Director, NAR

Have your members have ever asked, "How does the association impact my business?" The REALTOR® Party can be your most effective answer! Learn from veteran REALTOR® leaders how the REALTOR® Party is changing the conversation to help associations better engage in their community, affect public policy, and elect candidates who support our issues.

## Get Butts in the Seats With a Solid Business Plan

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

### 3:15 p.m. – 4:00 p.m. | Lone Star Salon F, Level 3

Adorna Carroll, ABR, ABRM, AHWD, CRB, C-RETS, e-PRO, GRI, RENE, SFR, SRS, President, Dynamic Directions, Inc., Newington, CT

Getting butts in the seats and creating a profit center doesn't have to be a challenge if you have a solid business plan for your professional and career development department. When you recognize that this business is not one-size-fits-all, that continuing education is not a destination but rather a by-product, and that some programs are best delivered privately while others are suited for mass consumption, you can restructure and re-energize your association cash flow.

## Core Standards 101

### 3:15 p.m. – 4:00 p.m. | Room 303/304, Level 3

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

See page 8 for session description.

## Keynote Address with Kat Cole

### 4:15 p.m. – 5:15 p.m. | JW Grand Ballroom, Level 4

## Icebreaker Reception

### 5:30 p.m. – 8:30 p.m. | Austin City Limits

Sponsored by SUPRA, Texas REALTORS®, and the following local associations in Texas: Austin Board of REALTORS®, Central Texas MLS, Collin County Association of REALTORS®, HAR.com, Lubbock Association of REALTORS®, North Texas Real Estate Information Systems, Inc.

# Daily Schedule

Sunday, March 31

## RCE Overview and ADF Workshop

**8:00 a.m. – 8:45 a.m. | Lone Star Salon E, Level 3**

## Innovating MLS Data Distribution

**8:00 a.m. – 8:45 a.m. | Lone Star Salon C, Level 3**

Facilitator: Rene Galicia, Director of MLS Engagement, NAR

Panelists: Brad Bjelke, CEO UtahRealEstate.com, Sandy, UT; Chris Carillo, CEO, Multiple Listing Service, Inc., Milwaukee, WI; Anne Marie DeCatsye, CEO, Charlotte Regional REALTOR® Association and Carolina MLS, Inc., Charlotte, NC; Stan Martin, Director of MLS, Austin Board of REALTORS®, TX

Managing the distribution of MLS data feeds, multiple licensing requests and agreements, compliance and standards can be overwhelming. Hear about two innovative solutions designed to streamline these tasks for the MLS while working to improve the experience for brokers, agents, and vendors.

## The Member Experience Rocks Featuring Bob and His Band

**9:00 a.m. – 10:30 a.m. | JW Grand Ballroom, Level 4**

*Sponsored by: NAR Office of the CEO*

## Not Invented Here – Acceleration of Technology in the Real Estate Industry

INNOVATION AND COLLABORATION

**10:45 a.m. – 11:30 a.m. | Lone Star Salon C, Level 3**

Facilitator: Todd Carpenter, Director, Strategic Investments, Strategic Business, Innovation, & Technology, NAR

Panelists: Walt Baczkowski, RCE, CAE, CEO, San Francisco Association of REALTORS®, CA; Mike Feller, Chief Revenue Officer, Active Pipe, Austin, TX; Jessica Hickok, RCE, CAE, GRI, CEO, Oklahoma Association of REALTORS®; Sebastian Tonkin, CEO, Glide, San Francisco, CA

Like it or not, technology startups are rapidly advancing the real estate industry. Consumers have more resources and technology available to them as they consider their next real estate transaction. Take a look at the role accelerator programs play in the success of startups, and how the REALTOR® organization works to align with startups and add to the REALTOR® value proposition.

## Words Matter

LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE

**10:45 a.m. – 11:30 a.m. | Lone Star Salon D, Level 3**

John Gormley, RCE, CAE, CIPS, CEO, Mainstreet Organization of REALTORS®, IL

Few other industries have more specialized jargon than real estate. We are swimming in alphabet soup with all of our designations and acronyms. That's not necessarily a good thing when we're trying to make stronger connections with consumers. Learn how to become a translator and get skinny with your message to tell stories that motivate and inspire.

## Maximize Communication for Association Leadership

MARKETING/COMMUNICATION/ADVOCACY

**10:45 a.m. – 11:30 a.m. | Lone Star Salon E, Level 3**

Juanita McDowell, e-PRO, CEO, InMotion Consulting, LLC, Peachtree City, GA

Effective communication doesn't happen by accident. From sharing your culture and vision to addressing issues that creep up within your organizations, there are many nuances to communicating as a leader. Acquire ten tips to strengthen your association by improving your ability to communicate with staff and members.

## Engage Future Leaders

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

**10:45 a.m. – 11:30 a.m. | Lone Star Salon F, Level 3**

Kathy Whitfield, ABR, GRI, RENE, SRS, Trainer/Instructor/Professional Coach, Compass Consulting, LLC, Madison, MS

The ongoing engagement and development of emerging leaders is critical to the future success of REALTOR® associations. This session offers essential yet simple steps to identify, recruit, and develop untapped talent to create future leaders.

## NAR Dues Policies and Dues Remittance Procedures

**10:45 a.m. – 11:30 a.m. | Room 303/304, Level 3**

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Director, Dues Compliance and REALTORS® Relief Foundation Services, NAR

See page 8 for session description.

## NAR's Association Investment Program – Investment Process & Strategy

**10:45 a.m. – 11:45 a.m. | Room 401, Level 4**



# Daily Schedule

**Sunday, March 31** (continued)

## Do You Really Know Your Members?

INNOVATION AND COLLABORATION

**11:45 a.m. - 12:30 p.m. | Lone Star Salon C, Level 3**

Steve Francks, RCE, CAE, CEO, Washington REALTORS®; Aleksandar Velkoski, DBA, Data Scientist, Research, NAR

You know your members – it's your job. But do you really know them? Learn how NAR's new Member Insight Datalab, also known as MinD, can provide insights into your members and help your association better serve them according to their own experiences and interests. Washington REALTORS® is working with NAR's Research team to better leverage insights about members to enhance outcomes, and will share how your association can move in a similar direction.

## MLS 101

LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE

**11:45 a.m. - 12:30 p.m. | Lone Star Salon D, Level 3**

Facilitator: Rene Galicia, Director of MLS Engagement, NAR  
Panelists: Cathy Faulkner, RCE, e-PRO, Director of Multiple Listing Services, MetroTex Association of REALTORS®, TX; Brad Bjelke, CEO, UtahRealEstate.com, Sandy, UT

Are you a new MLS exec? An experienced association exec new to the MLS world? Join us for an overview of general MLS policies and how to best implement them in your local marketplace. Learn some tricks of the trade from these experienced individuals who are not only implementing NAR policies, but also making their markets work, adding in some of the CMLS Best Practices. Hear about initiatives they have put into action to engage their broker owners and subscribers, and how they've collaborated with other MLS organizations to better serve their customers and the buying and selling public.

## Advocacy on a Budget (MCA)

**11:45 a.m. - 12:30 p.m. | Lone Star Salon E, Level 3**

Seth Palmer, Political Communications Director, Tennessee REALTORS®

Learn how to build a comprehensive, annual advocacy plan to successfully manage recurring events and handle unexpected challenges. Develop your draft plan using programs and services from the REALTOR® Party, and by collaborating with other local or state associations.

## Signed, Sealed, Delivered, I'm Yours! Seven Non-negotiables of Customer Service

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

**11:45 a.m. - 12:30 p.m. | Lone Star Salon F, Level 3**

Gail Alofsin, President, Authentic Measurable Performance, Newport, RI

What customers don't tell you is just as important, if not more important, than what they do. While advanced communication both streamlines and complicates our lives, you can use it to your advantage when you let these seven "non-negotiables" transport you and your team to a new level of service, and keep your internal and external customers coming back for more.

## Grab-and-Go Lunch

**12:30 p.m. - 1:15 p.m. | Griffin Hall Foyer, Level 2**

Sponsored by: MMSI and Rapattoni

## Networking Roundtables

**12:45 p.m. - 2:00 p.m. | Griffin Hall, Level 2**

## AE Institute Charity Project - Caritas of Austin

**12:45 p.m. - 2:00 p.m. | Griffin Hall, Level 2**

## NAR's Association Investment Program - One on One Sessions

**1:00 p.m. - 4:00 p.m. | Room 401, Level 4**

## Go Beyond the Business Model

INNOVATION AND COLLABORATION

**2:15 p.m. - 3:15 p.m. | Lone Star Salon C, Level 3**

Facilitator: Nobu Hata, Director, Member Engagement, NAR  
Panelists: Koki Adasi, ABR, CRS, SRS, Senior Vice President, Compass, Chevy Chase, MD; Holly Mabery, ABR, GRI, RSPS, SRS, State Administrative Broker, EXP Realty, Cottonwood, AZ; Kerry Melcher, Head of Brokerage & Industry, Opendoor, Scottsdale, AZ

Some leaders and members can get "into the weeds" when it comes to the commission/inventory/human resources issues that dominate a brokerage business model. Is that where association executives should focus their time and energy? Learn to think beyond policies and about the long-term trends that these big brokerages are influencing and shaping, and how they are changing the way consumers buy and sell real estate.

## Sanctions, Citations, Appeals, Oh My!

LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE

**2:15 p.m. - 3:15 p.m. | Lone Star Salon D, Level 3**

Facilitator: Leigh York, ABR, AHWD, CRS, GRI, MRP, RSPS, SFR, SRES, REALTOR®, Leigh Speaks, Fort Worth, TX

Panelists: Diane Mosley, RCE, Director, Training and Policy Resources, Member Experience, NAR; Carole Ridley, Professional Standards Administrator, Arizona REALTORS®; Corie Chase, Chief Administration Officer, Naples Area Board of REALTORS®, FL

You are part of the evolution of professional standards enforcement. Do you have questions about ombudsman, citation, or other procedures? Would you like a checklist? Flowchart? Training ideas? Do you have a great idea or best practice that you want to share? Join us for a peer-to-peer panel discussion and see how to exercise your voice and influence the future direction of professional standards enforcement.

## Grow Strategic Alliances Digitally With Industry Partners

MARKETING/COMMUNICATION/ADVOCACY

**2:15 p.m. - 3:15 p.m. | Lone Star Salon E, Level 3**

Marki Lemons Ryhal, ABR, CRS, SRS, Speaker, Marki Lemons Unlimited, Inc., Chicago, IL

Leverage free online tools and implement social media best practices to increase the digital presence and public awareness of your association and related industry partners, such as AREAA, WCR, NAHREP, and others. Promote the successes of the REALTOR® Party in your community and beyond, while adhering to guidelines that will keep your communications in line with campaign finance rules.

## Stop Conflict in Its Tracks

MEMBER ENGAGEMENT AND CUSTOMER SERVICE

**2:15 p.m. - 3:15 p.m. | Lone Star Salon F, Level 3**

Donna Garcia, RCE, MSHR, SPHR, SHRM-SCP, SWP, Director, Compensation, Benefits and Strategic Association Management Services, Talent Development & resources, NAR; Carole Kaptur, Director, Strategic Association Management, Talent Development & Resources, NAR

There are various underlying reasons why conflict in the workplace happens. The average day can be filled with issues that make it difficult to manage your reputation and maintain dignity as a team leader. Learn to identify the root causes, triggers and how to minimize conflict through strategic responses.

## NRDS and E-Commerce

**2:15 p.m. - 3:15 p.m. | Room 303/304, Level 3**

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

See page 8 for session description.

## NAR Issues Update

**3:30 p.m. - 4:30 p.m. | JW Grand Ballroom, Level 4**

# AEI Silent Auction

**Grand Ballroom Foyer, Level 4**

Be sure to stop by the AEI Silent Auction displays and bid on some of the great prizes via the app! Items include a variety of gift cards, smart home items, NAR offerings, and more! 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 2019 AEI App. The silent auction closes at 4:00 p.m. on Sunday, March 31<sup>st</sup>.

# Daily Schedule

**Monday, April 1**

## Continental Breakfast

**7:30 a.m. - 8:45 a.m. | JW Grand Ballroom Foyer, Level 4**

*Sponsored by: Real Safe Agent*

## Help Brokers Hire the Right Agents

**8:00 a.m. - 8:45 a.m. | Lone Star Salon F, Level 3**

Jess Biller, President, Paramount Consulting Group, LLC, Columbus, OH

There may be no faster way for a brokerage to grow than by hiring top performing agents. But how can your members tell the difference between those candidates that look good from those that will perform good? Learn how you can help your brokers identify three key characteristics that all top agents have in common and how to uncover these in the hiring process. Receive industry-based research that gives you the exact criteria for top-performing agents that can also provide valuable insight into the staff hiring decisions at state and local associations.

## A Broker's Perspective

**9:00 a.m. - 10:30 a.m. | JW Grand Ballroom, Level 4**

Facilitator: Stefan Swanepoel, Chairman & CEO, T3 Sixty LLC, San Juan Capistrano, CA

Panelists: Jonathan Boatwright, CEO, Realty Austin, Austin, TX; Mark Choey, Co-Founder, Climb Real Estate, San Francisco, CA; Sherry Chris, President and CEO, Better Homes and Gardens Real Estate, LLC, Madison, NJ

## Consolidation Is NOT the Only Way!

*INNOVATION AND COLLABORATION*

**10:45 - 11:45 a.m. | Lone Star Salon C, Level 3**

Facilitator: Marilyn Wilson Lund, Founding Partner, WAV Group & President, RETechnology.com

Panelists: Lauren Hansen, CEO, IRES LLC, Loveland, CO ; Stephanie White, RCE, CEO, Mobile Area Association of REALTORS®, AL; Jim Yockel, RCE, CEO, Greater Rochester Association of REALTORS®, NY

There's so much hype these days that makes every MLS believe the only way to better serve the needs of brokers is to consolidate. The truth is that there are tons of practical and achievable ways to help your members save money and make it easier for them to be successful. Join Marilyn Wilson Lund and other experts to learn how you can serve your brokers better.

## Lighten Your Load While Getting Your Om On

*LEADERSHIP/PROFESSIONALISM/ASSOCIATION GOVERNANCE*

**10:45 a.m. - 11:45 a.m. | Lone Star Salon D, Level 3**

Scott Oser, President, Scott Oser Associates, North Potomac, MD; KiKi L'Italien, CEO and Founder, Amplified Growth, Alexandria, VA

Do you feel like there are never enough hours in a day to do everything you need to do? Take a deep breath and join us for an hour of productivity strategies to put calm back in your mind and hope back in your heart. Bring mind, body and technology together for tools and practices to make you happier and more productive.

## Your Brand Is More than a Logo

*MARKETING/COMMUNICATION/ADVOCACY*

**10:45 a.m. - 11:45 a.m. | Lone Star Salon E, Level 3**

Facilitator: Karen Bebart, Director, Project Management, NAR

Panelists: Susanne Harrington, Principal, Asterisk Group Design, Austin, TX; Phil Newman, e-PRO, Communications Director, Tennessee REALTORS®; Betty Oltremari, CEO, East Mississippi REALTORS®, Meridian, MS

Learn from peers and advertising industry professionals how to evaluate your brand. Panelists will share their experiences from evaluating the health of a brand, to a new brand roll-out, including research, design, cultivating member support, and implementation. Attendees will leave with actionable steps and best practices to implement in their own associations.

## Create Your Customer Comfort Zone

*MEMBER ENGAGEMENT AND CUSTOMER SERVICE*

**10:45 a.m. - 11:45 a.m. | Lone Star Salon F, Level 3**

Brian Blasko, Speaker/Author/REALTOR®, Brian Blasko, Youngstown, OH

Effective communication is the key to success. In this fun-filled program, you'll discover and examine the four unique personality styles that we communicate with daily, and you'll recognize how to distinguish between these styles and tailor your member messages accordingly. This high-energy session will take you on an unforgettable journey into the mind of the 4x4, Volvo, sports car and minivan. Discover which vehicle you are!

## Plan Today for an Unexpected Tomorrow - Facing Disaster Recovery

**10:45 - 11:45 a.m. | Room 303/304, Level 3**

Andrea Bushnell, RCE, CEO, North Carolina REALTORS®; Cynthia Walsh, Brunswick County Association of REALTORS®, NC; Nicole Arnold, Director of Community Outreach, North Carolina REALTORS® Housing Foundation

"Where do I begin - no I mean really, where do I begin??"

Power is out everywhere, roads are blocked, homes and offices destroyed, cars drowning in flood waters... no idea if members are safe in their homes, safely evacuated or desperately in need of well, everything! You have to dig deep emotionally and get ready for a long, long slog. But before disaster strikes, get ready! Three veterans of 2016's Hurricane Matthew and 2018's Hurricane Florence will provide you with tools and ideas to help you prepare in advance of the disaster. Learn what to do in the event that the worst strikes first, and what it takes to survive and eventually thrive again.

## Lunch and Legal Update

**12:00 p.m. - 1:30 p.m. | JW Grand Ballroom, Level 4**

Katie Johnson, General Counsel and Chief Member Experience Officer, NAR

*Buffet lunch sponsored by CCIM*

## Economic Update

**1:30 p.m. - 2:30 p.m. | JW Grand Ballroom, Level 4**

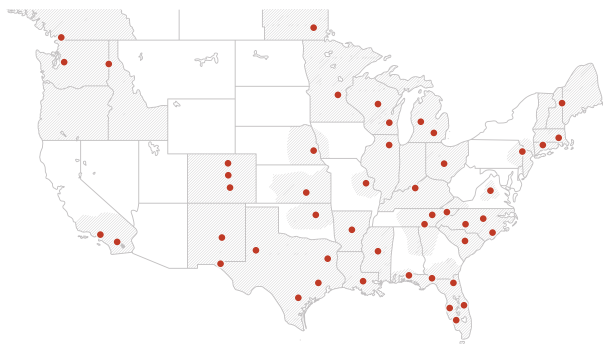
Lawrence Yun, Chief Economist and Senior Vice President, Research, NAR



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# Guide To Sponsor's Products And Services

*We wish to thank the following companies for their generous sponsorship of the 2019 AE Institute.*

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

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REBAC.net

The ABR® designation is designed for REALTORS® who represent buyers in residential real estate transactions. REALTORS® with this designation demonstrate commitment to protecting buyers' interests, experience in representing buyers and professionalism by completing the ABR® designation program.

## **Austin Board of REALTORS®**

4800 Spicewood Springs Road  
Austin, TX 78759  
512-454-7636  
Abor.com

At the Austin Board of REALTORS®, we use technology, education, and advocacy to build connections that strengthen the careers of our members and improve the lives of Central Texas families.

## **Black Knight MLS Solutions**

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

## **BoxBrownie.com**

30 / 13 Norval Court  
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Australia  
213-337-8681  
www.boxbrownie.com

BoxBrownie.com offers high-quality photo editing, virtual staging, floor plan redraws, and renders for residential and commercial real estate. The service is affordable, and pay as you go with no subscriptions and edits returned within 24 hours.

## **Commitment to Excellence (C2EX)**

430 N. Michigan Avenue  
Chicago, IL 60611  
800-874-6500  
C2Ex.realtor

Give your members a competitive advantage with C2EX, a new program that empowers REALTORS® to evaluate, enhance and showcase their high level of professionalism.

## **Catylist**

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

Catylist is the #1 commercial listing and research service for REALTOR® associations in North America, and is the premier solution for associations seeking to better serve commercial members.

## **CCIM Institute**

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

CCIM Institute is commercial real estate's value creation organization. CCIM educates and connects the world's leading experts in investment strategy, financial analysis, and market analysis.

## **Center for REALTOR® Development**

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

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

## **Center for REALTOR® Development Podcast**

430 N. Michigan Avenue  
Chicago, IL 60611  
CRDpodcast.com

The Center for REALTOR® Development Podcast aims to educate and increase professionalism in the real estate industry. It highlights formal education programs from NAR and its Affiliates, as well as informal learning sources. Our engaging host is award-winning instructor, speaker, and REALTOR®, Monica Neubauer. The podcast is sponsored by NAR's online learning platform, Center for REALTOR® Development. Subscribe wherever you listen to your podcasts.

## **Centralized Showing Service**

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Overland Park, KS 66210  
614-378-8513  
www.Showings.com

CSS provides a service to real estate agents through a combination of contact center representatives and easy-to-use technology. We organize and simplify the showing process for REALTORS® 24/7/365.

## **CoreLogic**

40 Pacifica  
Irvine, CA 92618  
www.corelogic.com  
Phone: 949-214-1000

CoreLogic (NYSE: CLGX) is a leading property information, analytics and solutions provider. The company's combined public, contributory and proprietary data sources include over 4.5 billion records spanning more than 50 years. The company helps clients identify and manage growth opportunities, improve performance and mitigate risk. For more information visit [www.corelogic.com](http://www.corelogic.com).

## **dynaConnections**

1101 S. Capital of Texas Hwy., Building H, Suite 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.

### **eCommission**

11612 Bee Cave Rd., Bldg 2, Suite 200  
Austin, TX 78738  
[www.ecommission.com](http://www.ecommission.com)  
877-882-4368

eCommission is the #1 provider of commission advance services to real estate professionals. Nearly every agent experiences cash flow challenges while selling real estate. eCommission gives agents immediate access to working capital allowing them to focus on what matters most – growing their business.

### **FBS-Creators of Flexmls®**

3415 39th Street South  
Fargo, ND 58104  
701-235-7300  
[www.flexmls.com](http://www.flexmls.com)

Trusted for 40 years, employee-owned FBS delivers a powerful real estate technology product suite connecting brokers, agents, developers, and consumers with accurate, comprehensive property information. See [www.flexmls.com](http://www.flexmls.com) for more.

### **FOREWARN, LLC**

2650 N. Military Trail, Suite 300  
Boca Raton, FL 33431  
561-757-4550  
[www.forewarn.com](http://www.forewarn.com)

FOREWARN allows agents to have instant due diligence on prospects, leading to safer and more productive interactions. With a phone number or name, agents can verify identity and records such as criminal, properties, bankruptcies, and liens.

### **Form Simplicity/Tech Helpline**

7025 Augusta National Drive  
Orlando, FL 32822  
888-784-5404  
[www.formsimplicity.com](http://www.formsimplicity.com)  
[www.techhelpline.com](http://www.techhelpline.com)

Form Simplicity is a paperless transaction solution available to associations and brokerages. Tech Helpline provides more than 600,000 REALTORS® with technical support on behalf of their associations, MLSs or brokerages.

### **GrowthZone AMS**

24400 Smiley Road, Suite 4  
Nisswa, MN 56468  
800-825-9171 x273  
[www.GrowthZone.com](http://www.GrowthZone.com)

GrowthZone AMS helps associations grow, retain, inform, and engage membership. The cloud-based system is powerful, easy to use, and designed to streamline tedious tasks. Guaranteed. Schedule a product tour: [www.GrowthZone.com](http://www.GrowthZone.com)

### **MMSI**

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

MMSI delivers the most intuitive, accurate, and customizable membership and accounting system for REALTOR® associations and MLSs. Celebrating 34 years of providing first-class customer service. We offer an industry leading, full responsive, and ADA-compliant Member Portal, with integrated SSO Dashboard, optional Identity Management, and much more. [www.GoMMSI.com](http://www.GoMMSI.com) Don't Compromise, Customize.

### **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 the Center for REALTOR® Development Affiliate Program to earn your next reward!

### **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 for the latest tools and resources from NAR to help you communicate the value of membership! This is the place to learn about orientation resources, including the Association Resource Packet, available from the REALTOR® Store. Learn how to apply for the 2019 REALTOR® Safety Reimbursement Grant Program, and how your members can benefit from .realtor™ and .realestate web addresses. Hear details about the new Commitment to Excellence(C2EX) and the Center for REALTOR® Financial Wellness programs, and pick up a free poster for your office, which highlights the new "That's Who We R®" consumer advertising Campaign.

### **Rapattoni Corporation**

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

With over 45 years of experience serving the real estate industry, Rapattoni Corporation offers a suite of innovative software products and services including a dynamic MLS with customer-branded mobile apps, association management software plus membership API, and integrated website services. All Rapattoni products include seamless integration, support for the latest industry standards, and technical support.

### **Real Estate Today**

500 New Jersey Avenue, NW  
Washington, DC 20001  
[radio.realtor](http://radio.realtor)

Real Estate Today, the official radio show and podcast of the National Association of REALTORS®, offers trustworthy and timely information on the real estate market. It's fast-paced and fact-packed with experts, interviews, call-ins, field reports, and timely market conditions. On radio stations, Siri, Echo, Google Home and Spotify, Real Estate Today promotes and supports the American Dream. Go to [radio.realtor](http://radio.realtor) to find out how you, as an NAR member can put the show on your website-for free!

### **Real Safe Agent**

7801 N. Capital of Texas Hwy., Suite 390  
Austin, TX 78731  
828-391-3081  
[www.realsafeagent.com](http://www.realsafeagent.com)

Real Safe Suite includes Real Safe Agent, Wire, and Chat, combining true crime prevention for agents, wire fraud prevention (up to \$1,000,000), and generates non-dues revenue for Associations/MLS.



# Guide To Sponsor's Products And Services

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800-878-4166  
[www.realtor.com](http://www.realtor.com)

Realtor.com® is the trusted resource for all things home with the most comprehensive for-sale listings than any other site. With insightful information, valuable tools, and professional expertise, realtor.com® makes finding the perfect home easy, while the new My Home experience allows you to track your home's value, view neighborhood market trends, and even get helpful tips and inspiration for remodeling or redecorating. Realtor.com® is your one stop shop for home buyers, sellers, and dreamers.

## **REALTOR® Party**

500 New Jersey Avenue NW  
Washington, DC 20001  
202-383-1209  
[www.realtorparty.realtor](http://www.realtorparty.realtor)

The REALTOR® Party is a powerful alliance of REALTORS® and REALTOR® associations working to advance public policies and candidates that build strong communities, protect property interests, and promote a vibrant business environment. REALTOR® Party resources, grants, and other tools are available to your association to help meet the Core Standards advocacy requirements while taking your advocacy operations to the next level.

## **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 Little Blue Book: Rules to Live By for REALTORS®* and *Real Estate Brokerage Essentials®*.

## **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 SE  
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.

## **Texas REALTORS®**

1115 San Jacinto Blvd.  
Austin, TX 78730  
512-480-8200  
[www.texasrealestate.com](http://www.texasrealestate.com)

Representing 120,000 members, Texas REALTORS® is committed to advocating for a strong real estate industry, advancing a culture of continued learning, and staying ahead of issues concerning members and clients.

## **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 and help your members increase their opportunities by becoming a REBAC course provider.

## **VESTAPLUS™ MLS Software Solutions**

8350 Wilshire Blvd.  
1st Floor  
Beverly Hills, CA 90211  
[www.vestaplus.net](http://www.vestaplus.net)

VESTAPLUS™ is a Powerful & Versatile MLS Software, designed based on the feedback of thousands of agents and brokers. Experience a simple, yet comprehensive listing search using in-depth criteria or an Interactive map. Intuitive Search Management helps you stay organized as you save searches and notify prospects. Explore a wide variety of easy-to-read report formats and utilize powerful dashboards to track and manage your client's viewing history. VESTAPLUS™ mobile capability provides a seamless experience. Pick up where you left off on-the-go with your phone with access to Saved Searches, Listings, Search and Contacts anytime, anywhere.

## **zipLogix™**

18070 15 Mile Road  
Fraser, MI 48026  
586-840-0140  
[www.ziplogix.com](http://www.ziplogix.com)

zipLogix™ is a technology company owned by REALTOR® Associations working to improve productivity and efficiency industry wide. Its transaction management software is available as a National Association of REALTORS® Transaction Management Benefit.



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spread the word. Ask about adding your forms to zipForm® Plus to  
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