

2015 Joint AE Institute



BEYOND BORDERS

Vancouver, BC, Canada



Official Sponsor of the 2015 Joint
Association Executives Institute

**FINAL
PROGRAM**

CREA THE CANADIAN
REAL ESTATE ASSOCIATION

 NATIONAL
ASSOCIATION *of*
REALTORS®

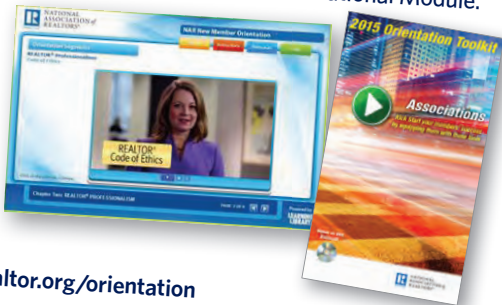
March 13-16, 2015

Hyatt Regency Vancouver Hotel
The Fairmont Hotel Vancouver
Vancouver, British Columbia

Welcome to Vancouver!

2015 Orientation Resources

Learn about NAR's Orientation Resources for Associations, including the Online Orientation National Module.



realtor.org/orientation

Member Value Plus (MVP) Program

Find out how many of your members are taking advantage of the Member Value Plus (MVP) program and get *The Little Blue Book: Rules to Live By for REALTORS®* for FREE.



mvp.realtor.org



Be sure to visit the **NAR Resource Table** for tools and resources to help you communicate the value of membership!

Member Center

This **FREE** and powerful place members can see benefits from all levels of their Association. **Reminder:** Update your Association's content and events.



membercenter.realtor.org/admin

REALTOR® Store

Browse publications for your members and board store, including the just-updated 2015 Association Resource Packet.

realtor.org/store



.REALTOR Domain

See how many of your members have claimed their .REALTOR domains.



about.realtor

REALTOR® Safety

Learn where you can download safety marketing resources for Associations and share the message of safety with your members.

realtor.org/safety



Visit the **NAR Resource Table** in the Regency Ballroom Foyer of the Hyatt Regency Vancouver.

 NATIONAL ASSOCIATION of REALTORS®

WHAT AN HONOR it is to serve as co-chairs of the Joint AE Institute. On behalf of the entire AE Institute Advisory Board, welcome to Vancouver! This fifth joint venture with our American and Canadian friends carries on the tradition of being a first-rate opportunity for professional development and updates on industry issues and trends. There is much we can learn from each other, and many of the sessions include perspectives from both sides of the border.

In addition to learning, we offer you numerous networking opportunities with the single largest gathering of REALTOR® AEs from both countries. We hope you take full advantage of this great opportunity to connect with longtime friends and make new ones. The AE community is invaluable for learning new perspectives on timeless topics and providing a sounding board for new ideas. If this is your first Institute, you will quickly see that we AEs know how to work, learn and play together.

The 2015 AE Institute Advisory Board developed courses and selected speakers who will aide in enhancing our members' success. This year's sessions will challenge us, keep us all current amidst the ongoing technology explosion, and motivate us to lead our associations to the next level.

During and between the sessions, take time to learn more about the REALTOR® association Certified Executive (RCE) and the Canadian REALTOR® Association Executive (CRAE) designations. The Institute is the perfect opportunity to earn points and learn more about what experiences you already have that can be included in your RCE applicant data form (ADF).

This program will assist you in selecting sessions to make the most out of your 2015 Joint AE Institute experience.

We're glad you're here, and we look forward to learning and networking with you these next few days.

Carol C Seal

Carol Seal, RCE
Dean, Joint Association
Executives Institute

Rob Philipp

Rob Philipp, CA, RI, CRAE
Dean, Joint Association
Executives Institute



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Registration Hours

Friday, March 13	7:30 a.m. – 5:30 p.m.
Saturday, March 14	7:30 a.m. – 4:00 p.m.
Sunday, March 15	8:00 a.m. – 3:00 p.m.

Information Desk

Monday, March 16	8:00 a.m. – 2:00 p.m.
Regency Foyer, Convention Level – Hyatt	

AE Institute Welcome Lounge

Friday, March 13, 4:00 p.m. – 6:00 p.m.

Stop by and meet the 2015 AE Institute Advisory Board while experiencing a uniquely Canadian start to your Joint Institute. The Welcome Lounge will feature a true “taste” of Canadian hospitality and you will discover all that Vancouver and its surrounding communities have to offer to make this Institute a memorable one. AE Institute Orientation will take place during the last half- hour of the Welcome Lounge.

Pacific Ballroom, Convention Floor – Fairmont

Sponsored by: The Canadian Real Estate Association and its provincial and local boards/associations



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2015 Joint Association Executives Institute Advisory Board



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Chair, Association Executives Committee
Chief Executive Officer
New Jersey Association of REALTORS®



David Bennett, CAE
Chief Executive Officer
Pinellas Suncoast Association of REALTORS® (FL)



Andrea Gagne, CRAE
Executive Officer
Sault Ste. Marie Real Estate Board (ON)



Lisa Noon, RCE, CAE
Chief Executive Officer
Oklahoma Association of REALTORS®



Marc Lebowitz, RCE, CAE
Vice Chair, Association Executives Committee
Chief Executive Officer
Tucson Association of REALTORS® (AZ)



Karen Bilodeau, CRAE
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Grande Prairie & Area Association of REALTORS® (AB)



Karen Gehle, RCE, CAE
Chief Executive Officer
Kansas Association of REALTORS®



Teresa Tilton, RCE
Director of Member Services
New Jersey Association of REALTORS®



Carol Seal, RCE
Co-Chair, Joint AE Institute Advisory Board
Chief Executive Officer
Greater Chattanooga Association of REALTORS® (TN)



Dwayne Carte
Education Director
Minneapolis Area Association of REALTORS® (MN)



Russell Hokanson, RCE
Chief Executive Officer
Seattle-King County Association of REALTORS® (WA)



Wes Wiggins
Chief Executive Officer
Jupiter Tequesta Hobe Sound Association of REALTORS® (FL)



Rob Philipp, CA, RI, CRAE
Co-Chair, Joint AE Institute Advisory Board
Chief Executive Officer
Fraser Valley Real Estate Board (BC)



Dave Corey, CRAE
Executive Officer
Victoria Real Estate Board (BC)



Michele Holen, RCE
Chief Executive Officer
Clark County Association of REALTORS® (WA)



Sally Young, RCE
Vice President of Member Services and Communications
Nevada Association of REALTORS®



Theresa Hatton, RCE, CAE
Vice Chair, Joint AE Institute Advisory Board
Chief Executive Officer
Greenwich Association of REALTORS® (CT)



Mark Epstein
Chief Executive Officer
Citrus Valley Association of REALTORS® (CA)



Ruth Link
Chief Executive Officer
Missoula County Association of REALTORS® (MT)



Lance Evans, RCE
Chief Executive Officer
Jefferson Lewis Board of REALTORS® (NY)



John Di Michele, CRAE
Chief Executive Officer
Toronto Real Estate Board (ON)



Congratulations 2014 RCEs and CRAEs!

2014 RCEs

Wyndi Austin, RCE

Southeast Valley Regional Association of REALTORS®, AZ

Karen Becker, RCE

Southeast Minnesota Association of REALTORS®

Gavin Blair, RCE

Dayton Area Board of REALTORS®, OH

Susan Blumhoefer, RCE

West Central Association of REALTORS®, MN

Byron Bogaard, RCE

Paul Cardus, RCE

Silicon Valley Association of REALTORS®, CA

Sharon Carlson, RCE

Quad City Area Association of REALTORS®, IA

Annette Marie Coffey, RCE

East Valley Association of REALTORS®, CA

Joseph Croce, RCE

Southside Virginia Association of REALTORS®

Pamela Croke, RCE

Bucks County Association of REALTORS®, PA

Tonya Deskins, RCE

Southeast Valley Regional of REALTORS®, AZ

Wendy DiVecchio, RCE

Greater Las Vegas Association of REALTORS®, NV

Brian Doherty, RCE

The Northeast Association of REALTORS®, MA

Amanda Sue Piltz Ebersson, RCE

Scottsdale Area Association of REALTORS®, AZ

Angela Emerson, RCE

Sussex County Association of REALTORS®, DE

Amanda Erickson, RCE

Durango Area Association of REALTORS®, CO

Cindi Ferguson, RCE

Wichita Area Association of REALTORS®, KS

David Freitag, RCE

Firelands Association of REALTORS®, OH

Janet Gallagher, RCE

REALTOR® Association of Martin County, FL

Laura Halverson, RCE

Tri-Counties Association of REALTORS®, CA

Bob Hart, RCE

Santa Barbara Association of REALTORS®, CA

Peggy Hill, RCE

Western Upstate Association of REALTORS®, SC

Michele Holen, RCE

Clark County Board of REALTORS®, WA

Myron Larimer, RCE

Greater South Bend-Mishawaka Association of REALTORS®, IN

Mona LeBleu, RCE

Kerrville Board of REALTORS®, TX

Miguel Legarreta, RCE

Ada County Association of REALTORS®, ID

Mary Leidy, RCE

Collin County Association of REALTORS®, TX

Ann Londrigan, RCE, CAE

Illinois Association of REALTORS®

Cliff Long, RCE

Birmingham Area Association of REALTORS®, AL

Peggy Lynch, RCE

Richmond Association of REALTORS®, VA

Dennis MacDonald, RCE

REALTORS® Association of the Palm Beaches, FL

Duncan MacKenzie, RCE

New York State Association of REALTORS®

Jean Maday, RCE

National Association of REALTORS®, IL

Celeta McClamma, RCE

Northeast Florida Association of REALTORS®

Joseph McClary, RCE, CAE

Kentucky Association of REALTORS®

Kim McCoy, RCE

Mainstreet Organization of REALTORS®, IL

Paul McLaughlin, RCE, CAE

Iowa Association of REALTORS®

Paula Nash, RCE

Pinehurst-Southern Pines Area Association of REALTORS®, NC

Amy Ritsko-Warren, RCE

Greater Capital Area Association of REALTORS®, MD

Cheryl Smith, RCE

Shelley Specchio, RCE

Northern Nevada Regional MLS Inc.

Deborah Talley, RCE, CAE

Richmond Association of REALTORS®, Central Virginia Regional MLS

Stephanie White, RCE

Bay County Association of REALTORS®, FL

Kimberly Wiggins, RCE

Northeast Florida Association of REALTORS® and MLS, FL

2014 CRAEs

Cyndi Amodeo

The Oakville, Milton and District Real Estate Board, ON

Patti Bartolucci

The Oakville, Milton and District Real Estate Board, ON

Cheryle Becker

Alberta Real Estate Association, AB

Dolores Bragagnolo

Toronto Real Estate Board, ON

Melinda Entwistle

British Columbia Real Estate Association, BC

Judy Ferguson

Central Alberta REALTORS® Association, AB

Steve Francis

The Oakville, Milton and District Real Estate Board, ON

Christiane Guerette

Association of Saskatchewan REALTORS®, SK

Von Jeppesen

The Oakville, Milton and District Real Estate Board, ON

Janette Laffin

Northumberland Hills Association of REALTORS®, ON

Jill McKenzie

Manitoba Real Estate Association, MB

Norma Miller

British Columbia Real Estate Association, BC

Megan Platts

REALTORS® Association of Hamilton-Burlington, ON

Christian Probst

The Canadian Real Estate Association, ON

Trudy Rees

Association of Saskatchewan REALTORS®, SK

Trevor Schmidt

Saskatoon Region Association of REALTORS®, SK

Andrea Snow

REALTORS® Association of Edmonton, AB

Marta Sponder

The Oakville, Milton and District Real Estate Board, ON

Annette Wiebe

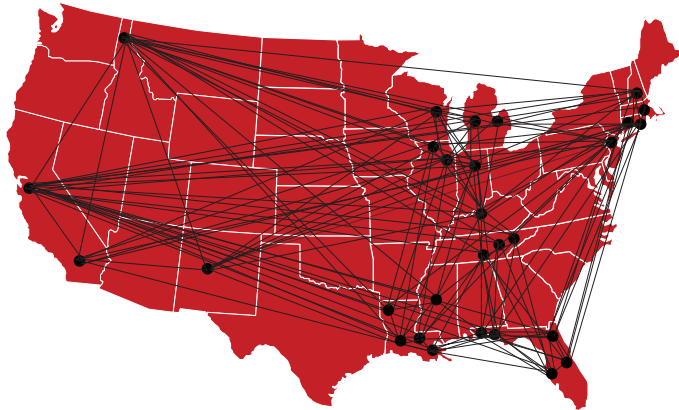
Brandon Real Estate Board, MB

Also, a round of applause goes out to all U.S. and Canadian AEs who are currently completing their RCE and CRAE designation requirements here at the 2015 Joint AE Institute!



Your **Commercial** Members will Thank You

- » Locally-branded Commercial Information Exchange (CIE) or Commercial MLS (CMLS) completely controlled and operated by your association.
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Greater Chattanooga Association of REALTORS®
Greater Louisville Association of REALTORS®
Indiana Commercial Board of REALTORS®
Knoxville Area Association of REALTORS®

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New Orleans Metropolitan Assn. of REALTORS®
Northwest Louisiana Association of REALTORS®
Pensacola Association of REALTORS®
REALTOR® Association of Acadiana
Rockford Area Association of REALTORS®
Statewide MLS of Rhode Island
And more!

Conference Contact:

Richard Maxson, Catylist SVP
920.605.7590 / richard@catylist.com
www.CATYLIST.com

NAR Pavilion

Saturday, March 14

**7:00 a.m. – 1:30 p.m. &
4:00 p.m. – 5:00 p.m.**

Sunday, March 15

7:00 a.m. – 1:30 p.m.

Regency Ballroom Foyer, Convention Level – Hyatt



NAR Pavilion Hosted Continental Breakfast

Sunday, March 15, 7:00 a.m. – 8:00 a.m.

Take some time to see all that NAR has to offer your association and enjoy your morning coffee and breakfast at the same time. The NAR Pavilion is hosting breakfast on Sunday morning and will feature mini presentations about the various NAR products and services. You'll have a dedicated block of time to see what NAR has been up to and what will benefit your members going forward.

Sponsored by: NAR Pavilion

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)
- Commercial
- The Canadian Real Estate Association
- *DocuSign®*
- Information Central
- NAR HR/Business Consulting Services
- NAR Global
- NAR Resource (& MVP Program) Table
- Consumer Advertising Campaign
- RAMCO
- Real Estate Today Radio
- RPAC
- *realtor.com®*
- REALTOR® Party & RPAC
- *Realtors Property Resource® (RPR®)*
- *REALTORS® Federal Credit Union, a Division of Northwest Federal Credit Union*
- *REALTOR Team Store®*
- REALTOR® University
- *REBAC - ABR® and e-PRO®*
- *SentriLock, LLC*
- *zipLogix*



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NAR Strategic Investment Companies in *Italics*



SPECIAL EVENTS AT-A-GLANCE

AE Institute Orientation

Friday, March 13, 5:30 p.m. – 6:00 p.m.

Learn how to select the right Institute sessions so you make the most out of your Institute experience. Orientation is a great opportunity to meet your peers.

Vancouver Island Room, Convention Floor – Fairmont

AE Young Professional Network (YPN) Meet-Up

Friday, March 13, 6:00 p.m. – 7:00 p.m.

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

Check the AEI event app, aei.barcoderealty.com, for location details.

State AEC Chair/Vice Chair Session

Saturday, March 14, 7:15 a.m. – 8:00 a.m.

A gathering for state AEC chairs and vice chairs to share ideas and learn more about NAR resources at their disposal.

Georgia Room B, Plaza Level – Hyatt

Opening Session

Saturday, March 14, 8:00 a.m. – 9:30 a.m.

The Opening Session is the official kick-off to the 2015 Joint AE Institute. Come and meet the 2015 AEI team, and leave exhilarated by a keynote address from Robyn Benincasa. Benincasa launched World Class Teams and its sister company, Flashover Seminars, to bring her unique and inspiring perspective on teamwork to the corporate world via keynotes, seminars and team-building programs. Her unforgettable presentations have taught countless high-performance leaders all over the world about "Building World Class Teams" and the 'followership' skills necessary for dynamic role shifting and true teamwork. You'll also hear from 2015 NAR President Chris Polychron and incoming 2015 CREA President Pauline Auger, who'll offer some special remarks.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: realtor.com®

"Taste of AEI" Sponsor Walk-Around Lunch

Saturday, March 14, 12:15 p.m. – 1:30 p.m.

The AE Institute's sponsoring vendors will host lunch in the various hospitality rooms. Participants can enjoy their lunch while learning about different products available to them and their members.

Plaza/Georgia Foyer – Hyatt

ShowingTime – Georgia Ballroom A

A.R. Richburg, LLC (MMSI) – Georgia Ballroom B

Centralized Showing Service – Plaza Ballroom A

CoreLogic – Plaza Ballroom B

RCE/CRAE Designee "Early Access Pass" to Icebreaker Reception

Saturday, March 14, 4:15 p.m. – 5:00 p.m.

A special opportunity for RCE and CRAE designees to network and renew old friendships before the rest of the Institute registrants arrive at the Icebreaker. This special pre-Icebreaker reception is just for RCE and CRAE designees.

Regency Ballroom, Convention Level – Hyatt

Icebreaker Reception

Saturday, March 14, 5:00 p.m. – 6:30 p.m.

Join your friends and colleagues for this special reception where there will be good food and good company at this official Institute welcome gala.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: SUPRA

Joint AE Institute Apparel Day

Sunday, March 15

Show your Joint AE Institute spirit by sporting your commemorative 2015 AE Institute jacket. (Price: \$60)

NAR AE Forum

Sunday, March 15, 8:00 a.m. – 9:00 a.m.

This special open forum allows U.S. AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

Regency Ballroom, Convention Level – Hyatt



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SPECIAL EVENTS AT-A-GLANCE

CREA AE Network Forum

Sunday, March 15, 8:00 a.m. – 9:00 a.m.

This special open forum allows Canadian AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

Plaza Ballroom, Plaza Level – Hyatt

REALTOR® Party Luncheon

Sunday, March 15, 12:00 p.m. – 1:30 p.m.

As a REALTOR® association executive, you know that politics plays an important role in your members' profession. Come enjoy lunch and sharpen your political insights with a special keynote address from Charlie Cook, publisher of *The Cook Political Report*, and widely regarded as one of the nation's leading authorities on U.S. elections and political trends.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: REALTOR® Party

RPAC Major Investor Reception

Sunday, March 15, 4:00 p.m. – 5:00 p.m.

This special reception is for RPAC major investors, by invitation only.

The Roof (15th Floor) – Fairmont

General Session

Monday, March 16, 8:00 a.m. – 9:00 a.m.

The 2015 AE Institute Advisory Board invites you to hear keynote speaker Mike Walsh, a global authority on 21st century business. He's a leading authority on the intersection of emerging technologies, consumer behavior and fast growth markets, and brings unique insights into the growing influence of new markets on breakthrough innovation and business transformation. Mike scans the near horizon for disruptive technologies and consumer innovations on the verge of hitting critical mass - then translates these into usable business strategies. You will walk away from this keynote with a reinvigorated spirit for what you do and a realization that you can shape your future.

Regency Ballroom, Convention Level – Hyatt

NAR Update Lunch

Monday, March 16, 11:45 a.m. – 1:15 p.m.

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

Regency Ballroom, Convention Level – Hyatt

Sponsored by: NAR Office of the CEO

CREA Update Lunch

Monday, March 16, 11:45 a.m. – 1:15 p.m.

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

Plaza Ballroom, Plaza Level – Hyatt

Joint Legal Update

Monday, March 16, 1:30 p.m. – 2:30 p.m.

Join NAR General Counsel Katie Johnson and CREA General Counsel Bill Harrington for an update on the legal issues impacting REALTOR® associations in both countries.

Regency Ballroom, Convention Level – Hyatt

Closing Session

Monday, March 16, 2:30 p.m. – 2:45 p.m.

Regency Ballroom, Convention Level – Hyatt



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REAL Trends is the trusted source for data and information on brokers and top agents. Use our 30 years of experience to your advantage.

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

RCE Exam

Friday, March 13, 8:00 a.m. – 11:45 a.m.

Cortes Island Room, Discovery Floor – Fairmont

RCE Study Session – (\$149)

Friday, March 13, 8:30 a.m. – 4:00 p.m.

Join fellow RCE designation candidates and work together to prepare for the RCE designation exam. This day-long study session will put you in your comfort zone and help confirm all that you know so you're ready to sit for the exam.

Boardroom, Convention Floor – Fairmont

RCE/CRAE Designee “Early Access Pass” to Icebreaker Reception

Saturday, March 14, 4:15 p.m. – 5:00 p.m.

A special opportunity for RCE and CRAE designees to network and renew old friendships before the rest of the Institute registrants arrive at the Icebreaker. This special pre-Icebreaker reception is just for RCE and CRAE designees.

Regency Ballroom, Convention Level – Hyatt

RCE Overview and ADF Workshop

Monday, March 16, 7:15 a.m. – 8:00 a.m.

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

AEI Event App

Visit aei.barcoderealty.com or scan the QR code to access the AEI Event app. Pick your favorite sessions, read up on speakers, and view and bid on silent auction items all on your mobile device!



1 707-8We Scan (893-7226) info@barcodepublicity.com



Friday, March 13, 2015

The Canadian REALTOR® Association Executive (CRAE) designation offers a series of comprehensive and practical courses designed for executive officers and senior staff of real estate boards and associations. The courses will help you increase your professional knowledge and skill development surrounding association management and industry issues, all while positively impacting collaboration and engagement among real estate executives and their associations. Join the growing community of high-performing and successful real estate board and association executives in Canada and embark on the path to the CRAE designation.

Module 1: Perspectives – Real Estate Associations Yesterday, Today and Tomorrow**8:00 a.m. – 12:00 p.m.**

Hugh Foy, CRAE, Director Commercial Member Development, Toronto Real Estate Board, Toronto, ON

Ever wonder how organized real estate came to be? This course will look at the evolution of the three-way agreement in organized real estate, the MLS® system, the REALTOR® Code, Competition Act and more. Investigate the leadership role of association executives and the impact you can make in the industry. This course will help participants understand how the history of organized real estate has shaped the current environment, and the impact it has on the future roles of real estate boards/associations and their leaders.

Weddington Room, Convention Floor – Fairmont

Module 3: Operations – Identifying Real Estate Association Options & Opportunities**1:00 p.m. – 4:30 p.m.**

John DiMichele, CRAE, CEO, Toronto Real Estate Board, Toronto, ON

Association executives play a strong leadership role in the success of the association and its members. This interactive course is designed to help you expand your knowledge of the support services available to the real estate association. Gain insights into the various available technology products that assist both the association and its REALTORS® to excel and investigate operational best practices.

Weddington Room, Convention Floor – Fairmont

Module 4: Leadership – Real Estate Association Executives Out Front**9:00 a.m. – 3:30 p.m.**

Theresa Kane, B.A. Sc, MBA, President, Piper and Company, Toronto, ON

An exciting case-based course that requires participants to draw on the knowledge and skills acquired throughout the CRAE designation program. Working in groups, participants will assess various situations, conduct research on provided business documents, build consensus and present their outcomes to their peers. Course materials are provided in advance to all participants to address complex problems/opportunities and promote informed decision making. (Pre-requisites: Modules 1, 2 & 3)

Tweedsmuir Room, Convention Floor – Fairmont



NAR CORE STANDARDS AT-A-GLANCE

REALTOR® associations must certify compliance with the Organizational Alignment Core Standards by June 30, 2015, and by June 30 of each subsequent year, or be subject to charter revocation. While at the Institute, take advantage of these classes, designed to touch upon the different aspects of the Core Standards and help ensure you're on the path to compliance.

REALTOR® Party Immersion Day Training

Friday, March 13, 8:30 a.m. – 4:30 p.m.

Looking to meet the Core Standards requirements? The REALTOR® Party will help you reach your goals in the areas of advocacy and community outreach. Join us for this only opportunity during AEI to break down what “advocacy” really means for REALTOR® associations. In this interactive workshop, using association scenarios, attendees will simulate building an advocacy plan. Choose from the programs, tools and services highlighted in this training to create your plan for 2015 and on. Lunch provided.

British Ballroom, Convention Floor – Fairmont

Financial Planning and the NAR Core Standards

Saturday, March 14, 7:00 a.m. – 8:00 a.m.

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR

Every association must adopt policies to ensure the fiscal integrity of their financial operations. This includes submitting an annual report from a CPA that includes an audit opinion or an accountant's review report, or a compilation report also prepared by a CPA. Attend this session and learn more about meeting this requirement and other aspects of the financial solvency core standard.

Georgia Room A, Plaza Level – Hyatt

Ace the NAR Mandatory Core Standards

Saturday, March 14, 3:00 p.m. – 4:00 p.m.

Facilitator: Andrea Bushnell, RCE, CEO, North Carolina Association of REALTORS®

Panelists: Gavin Blair, RCE, CEO, Dayton Area Board of REALTORS®; OH; Marc Lebowitz, RCE, CEO, Tucson Association of REALTORS®, AZ; Christine Todd, RCE, CAE, CEO, Northern Virginia Association of REALTORS®, VA

Hear from members of the NAR presidential advisory group that crafted the Organizational Alignment Core Standards as they discuss implementation best practices. Understand how to implement the Code of Ethics core standard; maximize participation in political advocacy, including PAC fundraising; and own the elements of community outreach with consistent statistics and a professional presence.

Pacific Ballroom, Convention Floor – Fairmont

Five Website Must-Haves

Sunday, March 15, 2:00 p.m. – 2:45 p.m.

Brian Copeland, ABR, CIPS, CRS, GRI, REALTOR®, Village Real Estate Services, Nashville, TN

The association website should be members' first point of contact. If it's not, you may be doing something wrong. Discover how to draw members into the association through your website. Learn five website must-haves that will save staff time and increase membership participation and satisfaction.

Saturna Island Room, Discovery Floor – Fairmont



Strategic Planning Implementation Workshop

Monday, March 16, 9:30 a.m. – 10:30 a.m.

Facilitator: Jerry Matthews, Advisor, Windermere, FL

Panelists: Ryan Conrad, RCE, CAE, e-PRO, CEO, Greater Lehigh Valley REALTORS®, Inc., PA; Clint Skutchan, RCE, e-PRO, CEO, Ft. Collins Board of REALTORS®, CO; Tricia Thomas, RCE, CEO, Bay East Association of REALTORS®, CA

Now that you have a new strategic plan that is in compliance with the Core Standards, what are some best practices to implement its goals and objectives? How do you make it a practical part of the budget or business plan? Listen as AEs who have successfully implemented a plan share their approaches, challenges, and solutions. Ask questions in this interactive format.

British Ballroom, Convention Floor – Fairmont

Consumer Outreach – Meet the NAR Core Standards Mandate

Monday, March 16, 10:45 a.m. – 11:30 a.m.

Panelists: Perry Crume, RCE, ABR, CIPS, Membership Director/Vice President, Kansas City Regional Association of REALTORS®, KS; Randall McCauley, Vice President of Government and Public Relations, The Canadian Real Estate Association; Shari Olefson, Director, The Carnegie Group, Fort Lauderdale, FL; Kimberly Pontius, RCE, CEO, Traverse Area Association of REALTORS®, MI

The wave of the future is consumer outreach. To comply with the Core Standards, every association will annually engage in at least four meaningful consumer engagement activities. Discover some peer-to-peer consumer engagement success stories, delivered TED-style, that you can share, discuss and bring home.


British Ballroom, Convention Floor – Fairmont

AEI SILENT AUCTION

British/Columbia Foyer – Fairmont

Be sure to stop by the Silent Auction and bid on some of the great prizes. Visit aei.barcoderealty.com to view items and bid on your favorites! All proceeds from the silent auction benefit the AE Professional Development Fund, which supports education and professional development for all AEs across the country.

The silent auction closes at 3:30 p.m. on Sunday, March 15.

2015 Joint AE Institute

BEYOND BORDERS

Commercial Real Estate and Residential Real Estate are not the same.

Help your members understand why.



New Course! Discovering Commercial Real Estate

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Sign up for a course license at NAR's Commercial Services table and receive a special thank you gift!

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NATIONAL
ASSOCIATION *of*
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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.

NAR Dues Policies and Dues Remittance Procedures

Saturday, March 14, 3:00 p.m. – 4:00 p.m.

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR; Patty Garcia, Managing Director, Credit and Revenue Processing 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.

Saturna Island Room, Discovery Floor – Fairmont

New AE Networking Breakfast

Sunday, March 15, 7:00 a.m. – 7:45 a.m.

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

Georgia Room B, Plaza Level – Hyatt

I'm a New AE, Now What?

Sunday, March 15, 10:45 a.m. – 11:30 a.m.

Cindy Butts, RCE, CAE, CEO, Connecticut Association of REALTORS®

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.

British Ballroom, Convention Floor – Fairmont

New EO/Association Staff Session (Canadian Session)

Sunday, March 15, 10:45 a.m. – 11:30 a.m.

Betty Doré, CRAE, Executive Officer, London and St. Thomas Association of REALTORS®, London, ON

Are you new to the job? It can seem overwhelming, right? Well, it doesn't have to be that way. This session will provide you with an overview of what to look out for and what resources are available to make the transition into your new role easier. Although geared to new AEs, all are welcome. It's also a great opportunity to meet colleagues in the same position and make connections that will last beyond the Institute.

Weddington Room, Convention Floor – Fairmont

NAR Policy 101

Monday, March 16, 9:30 a.m. – 10:30 a.m.

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR

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

Pacific Ballroom, Convention Floor – Fairmont

NAR NRDS and E-Commerce

Monday, March 16, 10:45 a.m. – 11:30 a.m.

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

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com® and the Action Center. Discover additional tools available in NRDS that will help you with the new Core Standards for associations. Bring your questions and Chris will supply the answers.

Columbia Ballroom, Convention Floor – Fairmont

PRE-INSTITUTE EVENTS – FRIDAY, MARCH 13

Certified Professional Standards Administration Program – (\$35)

8:00 a.m. – 5:00 p.m.

Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY; Diane Mosley, Director, Training and Policy Resources, NAR; Cliff Niersbach, RCE, Associate General Counsel of Board Policy, 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 their legal ramifications. If you attend all of the day's classes and complete and pass the professional standards exam, you will be certified as a Professional Standards Administrator.

Columbia Ballroom, Convention Floor – Fairmont

REALTOR® Party Immersion Day Training

8:30 a.m. – 4:30 p.m.

Looking to meet the Core Standards requirements? The REALTOR® Party will help you reach your goals in the areas of advocacy and community outreach. Join us for this only opportunity during AEI to break down what "advocacy" really means for REALTOR® associations. In this interactive workshop, using association scenarios, attendees will simulate building an advocacy plan. Choose from the programs, tools and services highlighted in this training to create your plan for 2015 and on. Lunch provided.

British Ballroom, Convention Floor – Fairmont

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

8:30 a.m. – 4:30 p.m.

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

Saturna Island Room, Discovery Floor – Fairmont

CIPS Global Programs for Associations – (\$95 – includes lunch)

8:30 a.m. – 4:30 p.m.

Janet Branton, CIPS, SRES, Senior Vice President, Commercial and Global Services, NAR, and Carol Kairis, AHWD, CIPS, e-PRO, RCE, RSPS, SRES, Managing Director, Professional Development, Commercial and Global Services, NAR

Interested in developing or growing global programs in your association? This course will help guide you through the development of a business and governance model that best fits your association structure. Learn strategies, discover creative sources for funding and use NAR resources and support to educate members on the global marketplace and its local advantages.

Plaza Ballroom B, Plaza Level – Hyatt

CMLS Best Practices Manual Overview

9:00 a.m. – 4:00 p.m.

Provided by the Council of Multiple Listing Services (CMLS) and based on the recently published *CMLS Best Practices*, which were created to improve professional standards in the MLS industry, these courses will help you honestly assess your organization. Take the challenge to adopt the CMLS best practices. Your customers will be happier, your employees will improve, your volunteers will step up, and your organization will thrive.

Plaza Ballroom A, Plaza Level – Hyatt

Commercial Membership by Design – (\$75)

1:00 p.m. – 4:30 p.m.

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

Georgia Room A, Plaza Level – Hyatt



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April 1-2

Foundations for Success in
Commercial Real Estate

LOS ANGELES

April 6-10

CI 101: Financial Analysis
for Commercial Investment
Real Estate

CHARLOTTE, N.C.

April 27

Commercial Real Estate
Negotiations

ONLINE

April 1

Communication Skills for
Business Professionals

April 7-16

High-Tech Marketing for
Commercial Real Estate

April 15

Real Estate Applications
of Time Value of Money
Concepts

May 4-6

Feasibility Analysis for
Commercial Real Estate

May 5-7

Advanced Market Analysis
for Commercial Real Estate

May 12-26

Real Estate Financial
Analysis Using Excel



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- BP Best Practices in REALTOR® Association Management:** It's true. The best learning comes from our peers. Let these peer-to-peer "how to" sessions keep you on your toes and at the forefront of what's working at REALTOR® associations across the country. These sessions will showcase the best of the best from amongst the industry, and leave you with implementation tools to get you started.
- IR Industry Relationships:** REALTOR® association management is a people business, and AE interpersonal skills are of the utmost importance. Whether it's incoming volunteer leaders, association staff, large brokers, MLS executives, consumers, political candidates and public servants, or community leaders, successful AEs need to know how to manage personalities and egos while focusing on desired goals. AEs must continuously work to strengthen relationships and support association partners who all strive to better serve REALTOR® members.
- RA Reengineer Your Association:** The real estate industry is dynamic and ever-changing. To thrive and survive in the current environment, the REALTOR® association must be adaptable and receptive to change. Open your mind to the creative possibilities that await your association structure, and be prepared to engage in a process that is guided by innovation and reinvention. Learn how to find the right mix of structure and flexibility so your association can remain relevant in the future.
- TC Technology and Communications:** Even with its challenges and uncertainties, technology is a given. It envelops all that we do. It's always changing and it's always improving. Learn how to embrace technology and all it can do for you and your association. Learn from the experts how to capitalize on technology when communicating with members and consumers. These classes will help you harness what you know and stretch to a new level.

FRIDAY, MARCH 13

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

Certified Professional Standards Administration Program (\$35)

8:00 a.m. – 5:00 p.m.

*Richard Haggerty, CEO, Hudson Gateway Association of REALTORS®, NY;
Diane Mosley, RCE, Director, Training and Policy Resources, NAR;
Cliff Niersbach, RCE, Associate General Counsel of Board Policy, NAR;
Patrick Reilly, RCE, Vice President, Member Services, New York State
Association of REALTORS®*

Columbia Ballroom, Convention Floor – Fairmont

RCE Exam

8:00 a.m. – 11:45 a.m.

Cortes Island Room, Discovery Floor – Fairmont

CRAE Designation Module 1: Perspectives – Real Estate Associations Yesterday, Today and Tomorrow

8:00 a.m. – 12:00 p.m.

Weddington Room, Convention Floor – Fairmont

RCE Study Session (\$149)

8:30 a.m. – 4:00 p.m.

Boardroom, Convention Floor – Fairmont

REALTOR® Party Immersion Day Training

8:30 a.m. – 4:30 p.m.

British Ballroom, Convention Floor – Fairmont

e-PRO® Day 1 (\$75 – includes lunch)

8:30 a.m. – 4:30 p.m.

Saturna Island Room, Discovery Floor – Fairmont

CIPS Global Programs for Associations (\$95 – includes lunch)

8:30 a.m. – 4:30 p.m.

Plaza Ballroom B, Plaza Level – Hyatt

CRAE Designation Module 4: Leadership - Real Estate Associations Out Front

9:00 a.m. – 3:30 p.m.

Tweedsmuir Room, Convention Floor – Fairmont

CMLS Best Practices Manual Overview

9:00 a.m. – 4:00 p.m.

Plaza Ballroom A, Plaza Level – Hyatt

CRAE Designation Module 3: Operations – Identifying Real Estate Association Options & Opportunities

1:00 p.m. – 4:30 p.m.

Weddington Room, Convention Floor – Fairmont

Commercial Membership By Design (\$75)

1:00 p.m. – 4:30 p.m.

Georgia Room A, Plaza Level – Hyatt

The REALTOR® PAC Management System Overview

2:00 p.m. – 2:30 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

The REALTOR® PAC Management System Credentialing Session

2:45 p.m. – 3:45 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

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Whether it's redirecting their new web address to an existing one, creating a custom website or utilizing the **FREE realtor.com® profile website**, encourage your members to check out websites of fellow REALTORS® who are using their .REALTOR domains in their business. Let them see for themselves the different ways they can get creative with .REALTOR.

To see member .REALTOR domain webpages, visit www.about.REALTOR.
For more .REALTOR marketing ideas, visit www.about.REALTOR/associations.



FRIDAY, MARCH 13 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

Using the PAC Management System to Achieve Recognition

4:00 p.m. – 4:45 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

AE Institute Welcome Lounge

4:00 p.m. – 6:00 p.m.

Stop by and meet the 2015 AE Institute Advisory Board while experiencing a uniquely Canadian start to your Joint Institute.

Pacific Ballroom, Convention Floor – Fairmont

Sponsored by: The Canadian Real Estate Association and its provincial and local boards/associations

AE Institute Orientation

5:30 p.m. – 6:00 p.m.

Learn how to select the right Institute sessions so you make the most out of your Institute experience. Orientation is a great opportunity to meet your peers.

Vancouver Island Room, Convention Floor – Fairmont

AE Young Professional Network (YPN) Meet Up

6:00 p.m. – 7:00 p.m.

SATURDAY, MARCH 14

Continental Breakfast

7:00 a.m. – 8:00 a.m.

Regency Ballroom Foyer, Convention Level – Hyatt

Sponsored by: SEI/Navica MLS

Financial Planning and the NAR Core Standards

7:00 a.m. – 8:00 a.m.

John Pierpoint, Senior Vice President/Chief Financial Officer, NAR

See class description on page 16.

Georgia Room A, Plaza Level – Hyatt

State AEC Chair/Vice Chair Session

7:15 a.m. – 8:00 a.m.

A gathering for state AEC chairs and vice chairs to share ideas and learn more about NAR resources at their disposal.

Georgia Room B, Plaza Level – Hyatt

Opening Session

8:00 a.m. – 9:30 a.m.

See course description on page 10.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: realtor.com®

BP The Association Big Three: Leadership, Strategy, and Success Trends

10:00 a.m. – 10:45 a.m.

Ryan Underwood, CEO, TRI Leadership Resources, Owasso, OK

This fast-paced presentation packs the best of a leadership and strategy retreat into a high-energy session that will give you practical tools and approaches to board leadership, association strategy, and the fundamental questions to ask as you prepare to innovate and navigate change. Learn the success trends of fast growth associations and how to apply these insights to help your leaders turn obstacles into opportunities for change.

Columbia Ballroom, Convention Floor – Fairmont

AE INSTITUTE DAILY SCHEDULE

SATURDAY, MARCH 14 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

IR What Planet Are These People From?

10:00 a.m. – 10:45 a.m.

Ted Mouradian, President, The 2 Percent Factor Inc., St. Catharines, ON

Learn how to protect yourself from becoming a victim when targeted by the 2% of the most difficult people you will come across in your life. Grasp strategies to understand their behavior and absorb some common sense solutions to address them and move forward. These skills will help you in your work with board and committee members, as well as in your personal life.

British Ballroom, Convention Floor – Fairmont

RA Association Leadership in the New Economy

10:00 a.m. – 10:45 a.m.

Andy Masters, M.A., C.S.P., Author/Speaker, Masters Performance Improvement, LLC, Orlando, FL

Overcome the “do more with less” reality while empowering and inspiring membership growth and participation. Hone a leadership style of developing, empowering, and delegating to accomplish more in less time with high quality results and less stress. Learn the value of empowering your board, committees, and members to take on greater responsibilities. Allow association leaders and staff to focus on greater strategic vision and proactive projects, while running day-to-day operations more effectively.

Pacific Ballroom, Convention Floor – Fairmont

TC Make Your Message Memorable

10:00 a.m. – 10:45 a.m.

Anthony Huey, President, Reputation Management Associates, Columbus, OH

How you communicate, whether in casual conversation or a formal presentation, can make the difference between success and failure. Learn how to craft concise, meaningful, and memorable messages, and how to effectively engage someone in conversation. You may only have one opportunity to connect with someone; use it wisely to leave a lasting impression.

Saturna Island Room, Discovery Floor – Fairmont

BP Is a Citation Policy Right for Your Association?

11:00 a.m. – 11:45 a.m.

Marcie Roggow, ABR, CCIM, CRB, CRS, DREI, GRI, SRS, Owner, Creative Learning Concepts, LLC, Naples, FL

Panelists: Sarah Petcher, General Counsel, Northern Virginia Association of REALTORS®, VA; Patricia Webb, RCE, Member Services Director, Texas Association of REALTORS®

The NAR Organizational Alignment Core Standards require all associations to examine their business practices to ensure they’re delivering top-notch member services. Improve your association’s professional standards services with the implementation of a citation policy that allows your association to establish a list of fines/sanctions for certain Code of Ethics violations. Learn the pros and cons of the policy and how it may provide a swifter outcome while omitting the need for a hearing panel.

Columbia Ballroom, Convention Floor – Fairmont

IR Strengthen the Relationship Between Brokers and Associations

11:00 a.m. – 11:45 a.m.

Steve Murray, President, Real Trends, Castle Rock, CO

Learn from an industry expert how to explore strategies and best practices to develop and maintain healthy relationships with large brokers. Then learn how to communicate and deliver value to this important constituency. This session will include takeaways so you can start enhancing the large broker/association relationship immediately.

British Ballroom, Convention Floor – Fairmont

RA CTRL+ ALT+ Believe: Reboot Your Association for Success

11:00 a.m. – 11:45 a.m.

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

Do you remember the old computer days when things were locked up and you stared at the “blue screen of death?” Back in the day all you had to do was hit CTRL-ALT-DEL. Do you ever wish rebooting your association was just as easy? Learn simple strategies to rebuild, reboot, and reengineer your association to meet and exceed your members’ needs for the future.

Pacific Ballroom, Convention Floor – Fairmont





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AE INSTITUTE DAILY SCHEDULE

SATURDAY, MARCH 14 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

TC Respond to MLS Emerging Trends

11:00 a.m. – 11:45 a.m.

Facilitator: Bill Lublin, CRB, CRS, GRI, Managing Member, Social Media Marketing Institute, Huntingdon Valley, PA

Panelists: Kipp Cooper, RCE, CAE, CEO/EVP, Huntsville Area Association of REALTORS®, AL; Stephanie Hill, CIPS, e-PRO, MLS Director/Vice President, Greater Las Vegas Association of REALTORS®, NV; Gregg Larson, President & CEO, Clarity Consulting, Scottsdale, AZ

What's trending in MLS? Listen as these industry leaders share their insights on the future of MLSs. They'll participate in an interactive panel discussion on the issues before the Emerging Trends and Technology Advisory Board, and how MLSs respond to those issues.

Saturna Island Room, Discovery Floor – Fairmont

"Taste of AEI" Sponsor Walk-Around Lunch

12:15 p.m. – 1:30 p.m.

Joint Institute attendees can enjoy their lunch while learning about different products available to them and their members. See page 10 for a listing of sponsor rooms

Plaza/Georgia Foyer, Plaza Level – Hyatt

Association Investment Program (AIP) One-on-One Session

1:00 p.m. – 4:00 p.m.

Want to speak individually about your association investment reserves? The AIP provides associations of all sizes access to full-service financial professionals who specialize in investing for nonprofit organizations.

Gabriola Island Room, Discovery Floor – Fairmont

State/Provincial Chief Staff Meeting

1:30 p.m. – 4:00 p.m.

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

Vancouver Island Room, Convention Floor – Fairmont

BP Master Magical Persuasion

2:00 p.m. – 2:45 p.m.

Traci Brown, Body Language Expert, Traci Brown, Inc., Boulder, CO

The most successful people in the world have one thing in common: they can use their body language to be extraordinarily persuasive. And you can learn how to do it too. Dive deep into simple body language techniques that will make you magnetic. People will automatically and unconsciously open up to you so you can persuade them if you need to. Learn to be flexible in your communication so you can direct any conversation and easily reach agreement. You'll be more successful with members in interviews, while networking, in negotiations, and at home with the kids.

Columbia Ballroom, Convention Floor – Fairmont

IR Command and Control Chaos

2:00 p.m. – 2:45 p.m.

Brandie Hinen, President, Power House Learning, Filer, ID

Are there internal and external barriers that prevent your association from moving forward? Break through them. Rearrange internal communications processes to identify, interpret, and formulate a plan so that all parties can negotiate. Move to deeper levels of authentic conversation with practical "how to's" so you can overcome some of your association's toughest challenges.

British Ballroom, Convention Floor – Fairmont

RA The Future of REALTOR® Education

2:00 p.m. – 2:45 p.m.

Nate Ellis, ABR, CIPS, Speaker, Educator, Coach, Walnut Creek, CA

REALTOR® learners are changing. They demand better content delivery, and tools and resources that keep them apace with changing technology and market conditions. Discover how to create a flexible education program that meets today's demands and makes your members and your association more profitable.

Pacific Ballroom, Convention Floor – Fairmont



SATURDAY, MARCH 14 (continued)

TC Emerging Leadership Issues with Technology

2:00 p.m. – 2:45 p.m.

Nobu Hata, Director Digital Engagement, NAR; Melanie Wyne, Senior Policy Representative, Government Affairs, NAR

Imagine this. One of your members comes to a professional standards hearing wearing Google Glass. What do you do? Modern technology can wield a lot of power over a typical work day. Explore the potential implications of using technology such as Google Glass, drones, smart watches, cloud computing, and big data in association meetings and while conducting association business.

Saturna Island Room, Discovery Floor – Fairmont

BP Top Four Mistakes No One Saw Coming

3:00 p.m. – 4:00 p.m.

Margy Grant, RCE, CAE, Esq., Florida Association of REALTORS®; Jenny Pakula, RCE, CAE, JD, General Counsel, Oregon Association of REALTORS®

Let these two in-house legal counsels help you stop legal issues before they start, especially those involving board antitrust, MLS, and professional standards. Learn what to look for when reviewing service contracts and how to combat recurring issues in the future. Understand the value of having strong policies in place and how their existence can keep your association out of legal hot water.

Columbia Ballroom, Convention Floor – Fairmont

IR Engage Everyone and Build Lasting Member Relationships

3:00 p.m. – 4:00 p.m.

Greg Witz, President and CEO, Witz Education, Toronto, ON

Member communication is vital to your association's growth. Today's diverse membership pool calls for diverse communication techniques so you reach everyone. Your job is to develop communications skills to effectively connect with all your members. Uncover how to attract and retain the next generation of members, and how to build powerful relationships and structure your messaging to engage all generations.

British Ballroom, Convention Floor – Fairmont

RA Ace the NAR Mandatory Core Standards

3:00 p.m. – 4:00 p.m.

Facilitator: Andrea Bushnell, RCE, CEO, North Carolina Association of REALTORS®

Panelists: Gavin Blair, RCE, CEO, Dayton Area Board of REALTORS®; OH; Marc Lebowitz, RCE, CEO, Tucson Association of REALTORS®, AZ; Christine Todd, RCE, CAE, CEO, Northern Virginia Association of REALTORS®, VA

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Pacific Ballroom, Convention Floor – Fairmont

TC NAR Dues Policies and Dues Remittance Procedures

3:00 p.m. – 4:00 p.m.

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Saturna Island Room, Discovery Floor – Fairmont

The REALTOR® PAC Management System Overview

4:00 p.m. – 4:30 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

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SATURDAY, MARCH 14 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

RCE/CRAE Designee “Early Access Pass” to Icebreaker Reception

4:15 p.m. – 5:00 p.m.

A special opportunity for RCE and CRAE designees to network and renew old friendships before the rest of the Institute registrants arrive at the Icebreaker. This special pre-Icebreaker reception is just for RCE and CRAE designees.

Regency Ballroom, Convention Level – Hyatt

Icebreaker Reception

5:00 p.m. – 6:30 p.m.

Join your friends and colleagues for this special reception where there will be good food and good company at this official Institute welcome gala.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: SUPRA

SUNDAY, MARCH 15

NAR Pavilion Hosted Continental Breakfast

7:00 a.m. – 8:00 a.m.

Regency Ballroom Foyer, Convention Level – Hyatt

Sponsored by: NAR Pavilion



New AE Networking Breakfast

7:00 a.m. – 7:45 a.m.

Georgia Room B, Plaza Level – Hyatt

NAR AE Forum

8:00 a.m. – 9:00 a.m.

This special open forum allows U.S. AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

Regency Ballroom, Convention Level – Hyatt

CREA AE Network Forum

8:00 a.m. – 9:00 a.m.

This special open forum allows Canadian AEs to hear updates and participate in discussions about the issues impacting their associations and their members.

Plaza Ballroom, Plaza Level – Hyatt

BP 10 Leadership Strategies to Improve Association Productivity, Profits, and Communication

9:30 a.m. – 10:30 a.m.

Mary Kelly, CEO, Productive Leaders, Dallas, TX

Learn what most volunteers and employees need from their leaders and managers to be more effective. Discover how to use your networks and relationships to further your influence and reach your strategic goals. Implement actionable items to create cohesive teamwork, improve personal and professional productivity, and better engage those around you. Come away from this session with three core techniques, seven critical applications, and templates to provide usable feedback for your staff and volunteers.

Columbia Ballroom, Convention Floor – Fairmont

IR Three Steps to Create a High Performance Team

9:30 a.m. – 10:30 a.m.

Aly Pain, CPCC, PCC, ORSCC, Business Systems Expert, Aly Pain Professional Coaching Services, Vernon, BC

It's not difficult to create a winning team. 1) Clarify a strong, passionate vision and goals; 2) Establish team commitment through measurable and accountable results; 3) Improve communication and manage conflict through awareness of individual styles, strengths, and differences. Learn how to implement these three steps so your team can come to the game and win.

British Ballroom, Convention Floor – Fairmont

AE INSTITUTE DAILY SCHEDULE

SUNDAY, MARCH 15 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

RA What Members Want

9:30 a.m. – 10:30 a.m.

Steve Murray, President, REAL Trends, Inc., Castle Rock, CO; Terry Penza, RCE, CAE, Director of Network Membership, REAL Trends, Inc., Fort Myers, FL

Does one size fit all when it comes to delivering member services? Let Steve Murray and Terry Penza help you answer that question by helping you take a fresh look at what members truly want from their association. They'll explore how you can incorporate those desires into association-based strategies and deliver targeted services to each member segment.

Pacific Ballroom, Convention Floor – Fairmont

TC Video Production Best Practices

9:30 a.m. – 10:30 a.m.

Nancy Guarascio, Director of Marketing, J. Rockcliff REALTORS®, Danville, CA

Video is becoming an integral part of our everyday communication. How can you bring it into your association communications? Learn best practices and techniques to make engaging videos, including creative tricks to make the most out of a shoot, and how to build a studio on a budget.

Saturna Island Room, Discovery Floor – Fairmont

Association Investment Program Investment Process and Strategy

10:15 a.m. – 11:15 a.m.

Come speak to NAR-designated investment specialists about how your association can better manage your investment reserves.

Gabriola Island Room, Discovery Floor – Fairmont

BP How to Harness Storytelling and Get Ahead

10:45 a.m. – 11:30 a.m.

Marc D. Gould, RCE, Vice President, Business Specialties, NAR

The art of storytelling extends back through the ages. Humans are wired to engage in storytelling as both narrator and audience. Knowing how to tell your story and draw people in are as important as the topic and the content.

With the help of real-world examples and interactive scenarios, you'll see how storytelling can engage your audience and create an environment where everyone coalesces around a common goal; whether it be gaining buy-in for your strategic plan, or increasing broker engagement.

Columbia Ballroom, Convention Floor – Fairmont

IR I'm a New AE, Now What?

10:45 a.m. – 11:30 a.m.

Cindy Butts, RCE, CAE, CEO, Connecticut Association of REALTORS®

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. Find out what you should look for, common mistakes made the first year, and resources available to you.

British Ballroom, Convention Floor – Fairmont

New EO/Association Staff Session (Canadian Session)

10:45 a.m. – 11:30 a.m.

Betty Doré, CRAE, Executive Officer, London and St. Thomas Association of REALTORS®, London, ON

This session will provide you with an overview of what to look out for and what resources are available to make the transition into your new role easier. Although geared to new AEs, all are welcome.

Weddington Room, Convention Floor – Fairmont

RA Research: When, How (and How Not To)

10:45 a.m. – 11:30 a.m.

Lisa Herceg, PRC, Director of Marketing Research, NAR

Research takes time, effort, and money. And it can be one of the strongest weapons in your arsenal when facing important association decisions. Learn how to contain your research costs by understanding when you need research, when you don't, and how to avoid some of the more common mistakes if you do conduct it. Session takeaways will help you make informed research-related decisions right away.

Pacific Ballroom, Convention Floor – Fairmont



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AE INSTITUTE DAILY SCHEDULE

SUNDAY, MARCH 15 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

TC The Connected Economy: Marketing's New Frontier

10:45 a.m. – 11:30 a.m.

Peter Mosca, CCFA, e-PRO, GREEN, SFR, SRES, PR/Executive Communications Consultant, Howell, NJ

Today's REALTOR® lives and operates in a digital age; an “always-on” economy where attention is a currency needed to thrive in the competitive real estate industry. Association executives need that same currency to remain relevant with internal and external audiences. Examine commonly-held beliefs about print and social media campaigns, online channels, and consumer behaviors. Leave this session with takeaways about the impact the “attention economy” has on your association and the marketplace.

Saturna Island Room, Discovery Floor – Fairmont

REALTOR® Party Luncheon

12:00 p.m. – 1:30 p.m.

As a REALTOR® association executive, you know that politics play an important role in your members' profession. Come enjoy lunch and sharpen your political insights with a special keynote address from Charlie Cook, publisher of *The Cook Political Report*, and widely regarded as one of the nation's leading authorities on U.S. elections and political trends.

Regency Ballroom, Convention Level – Hyatt

Sponsored by: REALTOR® Party

Association Investment Program (AIP) One-on-One Session

1:00 p.m. – 4:00 p.m.

Want to speak individually about your association investment reserves? The AIP provides associations of all sizes access to full-service financial professionals who specialize in investing for nonprofit organizations.

Gabriola Island Room, Discovery Floor – Fairmont

BP Best Future Practices for MLSs

2:00 p.m. – 2:45 p.m.

Carrie Kendall, RCE, Executive Officer, Lafayette Regional Association of REALTORS®, IN; Cameron Paine, RCE, CEO, Connecticut Multiple Listing Services, Inc.

With consumers demanding a higher level of customized information, are MLSs keeping up and serving their constituents with innovative data delivery? Hear two industry professionals discuss their versions of MLS best practices. They'll also share insights on how to stay ahead in creative, yet practical, ways, and how to deliver the best solutions to keep ahead of the market.

Columbia Ballroom, Convention Floor – Fairmont

IR Survive and Thrive with a Challenging President

2:00 p.m. – 2:45 p.m.

Facilitator: David Phillips, RCE, CAE, CEO, Pennsylvania Association of REALTORS®

Hear how your peers worked past some challenging leadership traits and made it a great year. Tap into the success stories of a panel of AEs who have not only survived, but thrived during those years. Take away tips and techniques to move your organization forward despite the apparent leadership void.

Pacific Ballroom, Convention Floor – Fairmont

RA Keep Meetings (and Minutes) Simple

2:00 p.m. – 2:45 p.m.

Adorna Carroll, ABR, CIPS, CRB, GRI, President, Dynamic Directions Inc., Newington, CT

Keep meetings and meeting minutes simple and reduce association liability. Yes, it's that simple. Meetings don't have to be marathon sessions or all-day events, and minutes don't have to be evidence for the prosecution (or defense) when subpoenaed. Efficient and effective meetings yield better quality participation and happier members. See how you can easily streamline meetings, take meaningful minutes, and reduce liability.

British Ballroom, Convention Floor – Fairmont



SUNDAY, MARCH 15 (continued)

TC Five Website Must-Haves

2:00 p.m. – 2:45 p.m.

Brian Copeland, ABR, CIPS, CRS, GRI, REALTOR®, Village Real Estate Services, Nashville, TN

The association website should be members' first point of contact. If it's not, you may be doing something wrong. Discover how to draw members into the association through your website. Learn five website must-haves that will save staff time and increase membership participation and satisfaction.

Saturna Island Room, Discovery Floor – Fairmont

BP Reengineer Your Association Leadership

3:00 p.m. – 3:45 p.m.

Roger Turcotte, CBR, CDEI, DREI, GRI, Owner, Roger Turcotte and Co., LLC, Contoocook, NH

The decisions that volunteer leaders make determine the value your association has in its members' lives. Using the "Four Principles of Relevance-Based Leadership," you will learn to keep your leaders focused on what matters to members rather than what benefits them as leaders. This fast-paced session is a must attend for AEs who hear members ask, "What do I get for my dues dollar?"

Columbia Ballroom, Convention Floor – Fairmont

IR Build Bridges, Build Businesses: Form Global Association Relationships

3:00 p.m. – 3:45 p.m.

John Gormley, CIPS, RCE, Vice President, Communications and Marketing, Texas Association of REALTORS®; Alan Tennant, FRI-(E), CAE, CRAE, CEO, Calgary Real Estate Board, Calgary, AB; Albert Tran, CIPS, Executive Officer, West San Gabriel Valley Association of REALTORS®, San Gabriel, CA

Want to grow global real estate investment in your area to help your members? Formal relationships with foreign real estate associations can raise the profile of your market overseas and attract consumers and business from other countries. Develop an awareness of the global market and how your association can partner with an overseas real estate trade organization to increase member profitability in both countries.

British Ballroom, Convention Floor – Fairmont

RA Member Before Association: The Nordstrom Way

3:00 p.m. – 3:45 p.m.

Maura Neill, CRS, GRI, REALTOR®, Maura Neill, LLC, Alpharetta, GA

Nordstrom is known for its legendary customer service. As such, it serves as a good model for how associations can put members' needs and wants first. This approach can build long-term relationships and loyalty. When associations view the member as customer, associations can rethink their missions and continue to prove, and improve, the value of membership.

Pacific Ballroom, Convention Floor – Fairmont

TC Leverage Membership Data

3:00 p.m. – 3:45 p.m.

T. J. Doyle, Social Media Director, NAR; Jessica Lautz, Director, Member and Consumer Survey Research, NAR

This practical "how-to" session will show you NAR's available membership data and explain what it really means. Then you'll be instructed how to use the data to assist members in their everyday business. You'll also see how to apply it in your daily association operations.

Saturna Island Room, Discovery Floor – Fairmont

The REALTOR® PAC Management System Credentialing Session

3:45 p.m. – 4:30 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

Using the PAC Management System to Achieve Recognition

4:30 p.m. – 5:15 p.m.

Grouse Room, Perspectives Level (34th floor) – Hyatt

RPAC Major Investor Reception (By Invitation Only)

4:00 p.m. – 5:00 p.m.

The Roof (15th Floor) – Fairmont

RAMCO Subscriber Implementation Meeting

4:00 p.m. – 5:00 p.m.

Columbia Ballroom, Convention Floor – Fairmont

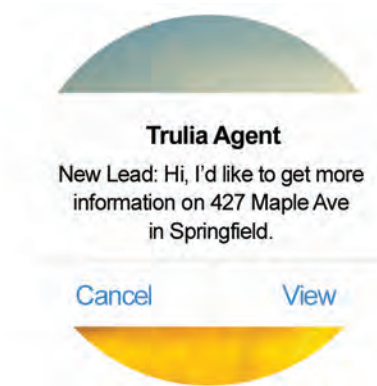
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MONDAY, MARCH 16

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

Continental Breakfast

7:00 a.m. – 8:00 a.m.

Regency Ballroom Foyer, Convention Level – Hyatt

Housing Affordability: History, Trends, Predictions and Resources Your Members May Need in the Coming Years

7:00 a.m. – 8:00 a.m.

Shari Olefson, Director, The Carnegie Group, Fort Lauderdale, FL

It's no secret that home prices and rental rates have been rising faster than average American workers' wages. As this gap grows, how does it impact housing affordability in our country? How does U.S. housing affordability compare with Canada and other nations today? And how are long-time public housing assistance programs and policies keeping up with our expanding housing affordability gap? This session provides a basic primer on the history of affordable housing policy, programs and issues, the U.S.'s growing need for and policy focus on entry level and workforce housing, and how those needs may be met in the coming years.

Georgia Ballroom A, Plaza Level – Hyatt

RCE Overview and ADF Workshop

7:15 a.m. – 8:00 a.m.

See class description on page 14.

General Session

8:00 a.m. – 9:00 a.m.

The 2015 AE Institute Advisory Board invites you to hear keynote speaker Mike Walsh, a global authority on 21st century business. He's a leading authority on the intersection of emerging technologies, consumer behavior and fast growth markets, and brings unique insights into the growing influence of new markets on breakthrough innovation and business transformation. Mike scans the near horizon for disruptive technologies and consumer innovations on the verge of hitting critical mass – then translates these into usable business strategies. You will walk away from this keynote with a reinvigorated spirit for what you do and a realization that you can shape your future.

Regency Ballroom, Convention Level – Hyatt

BP Financial Management and Partnering with Volunteer Leaders

9:30 a.m. – 10:30 a.m.

Dave Garrison, RCE, CAE, CIPS, CPA, VP of Finance, Professional Development & Internal Operations, Florida REALTORS® Association, Orlando, FL

Balancing the books is a part of your job, but so is balancing the relationship with your volunteer leaders. Keep them in the loop on all things financial to help grow the staff/volunteer relationship and strengthen the trust. Craft financial communication practices that keep the leadership informed so that you're both equipped to better carry out your responsibilities.

Columbia Ballroom, Convention Floor – Fairmont

IR Strategic Planning Implementation Workshop

9:30 a.m. – 10:30 a.m.

Facilitator: Jerry Matthews, Advisor, Windermere, FL

Panelists: Ryan Conrad, RCE, CAE, e-PRO, CEO, Greater Lehigh Valley REALTORS®, Inc., PA; Clint Skutchan, RCE, e-PRO, CEO, Ft. Collins Board of REALTORS®, CO; Tricia Thomas, RCE, CEO, Bay East Association of REALTORS®, CA

Now that you have a new strategic plan that is in compliance with the NAR Core Standards, what are some best practices to implement its goals and objectives? How do you make it a practical part of the budget or business plan? Listen as AEs who have successfully implemented a plan share their approaches, challenges, and solutions. Ask questions in this interactive format.

British Ballroom, Convention Floor – Fairmont

RA NAR Policy 101

9:30 a.m. – 10:30 a.m.

Rodney Gansho, RCE, Managing Director, Member Policy, Board Policy & Programs, NAR

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

Pacific Ballroom, Convention Floor – Fairmont

AE INSTITUTE DAILY SCHEDULE

MONDAY, MARCH 16 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

TC Social Media Is Out, so What's In? What's Next?

9:30 a.m. – 10:30 a.m.

Facilitator: Nobu Hata, Director Digital Engagement, NAR

Panelists: Teah Hopper, Director of Digital Engagement, Missouri REALTORS®; Bill Harrington, General Counsel, CREA; Blake Hegeman, Deputy General Counsel, Virginia Association of REALTORS®; Katie Johnson, General Counsel, NAR

REALTORS® have fragmented their use of Facebook, Twitter and other social media channels to conduct business behind closed doors, through affiliated business agreements and pocket listings. What can and should your association look for and do about this old practice that disguises itself under new technology? Learn how to coach brokers on the pitfalls of consumer confusion, and how to educate consumers so they come back to your members for guidance through the transaction.

Saturna Island Room, Discovery Floor – Fairmont

CREA Consumer Research – What Were They Thinking?

9:30 a.m. – 10:30 am

Randall McCauley, CREA Vice-President of Government and Public Relations, and Linda Kristal, CREA Director of Communications

Over the past few years CREA has conducted some ground-breaking research into the consumer's perspective on buying and selling property. How have consumer views changed? What do they value from REALTORS®? Randall McCauley, CREA Vice-President of Government and Public Relations, Linda Kristal, CREA Director of Communications, will lead this session on real estate from a consumer's point of view.

Waddington Room, Convention Floor – Fairmont

BP NAR NRDS and E-Commerce

10:45 a.m. – 11:30 a.m.

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

Come learn what you need to do to maintain members' NRDS data, and learn the importance of how NRDS data interacts with the local, state, and national associations, as well as other systems such as realtor.com® and the Action Center. Discover additional tools available in NRDS that will help you with the new Core Standards for associations. Bring your questions and Chris will supply the answers.

Columbia Ballroom, Convention Floor – Fairmont

IR Consumer Outreach – Meet the NAR Core Standards Mandate

10:45 a.m. – 11:30 a.m.

Panelists: Perry Crume, RCE, ABR, CIPS, Membership Director/Vice President, Kansas City Regional Association of REALTORS®, KS; Randall McCauley, Vice President of Government and Public Relations, The Canadian Real Estate Association; Shari Olefson, Director, The Carnegie Group, Fort Lauderdale, FL; Kimberly Pontius, RCE, CEO, Traverse Area Association of REALTORS®, MI

The wave of the future is consumer outreach. To comply with the Core Standards, every association will annually engage in at least four meaningful consumer engagement activities. Discover some peer-to-peer consumer engagement success stories, delivered TED-style, that you can share, discuss and bring home.

British Ballroom, Convention Floor – Fairmont

RA Manage Your Association Like a Billion Dollar Brand

10:45 a.m. – 11:30 a.m.

Gerry O'Brien, Marketing Speaker, What Big Brands Know, Denver, CO

Learn five key strategies to turn your members into raving fans. Find out how to increase member involvement, even with a small budget. Ignite your word of mouth by creating powerful, sharable messages. Gerry O'Brien was an executive for billion dollar brands and will teach simple tools to elevate your association and the REALTOR® brand.

Pacific Ballroom, Convention Floor – Fairmont





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AE INSTITUTE DAILY SCHEDULE

MONDAY, MARCH 16 (continued)

BP Best Practices in REALTOR® Association Management **IR** Industry Relationships **RA** Reengineer Your Association **TC** Technology and Communications

TC Stay on Top of Data Security

10:45 a.m. – 11:30 a.m.

Alex Camelio, President, Barcode Publicity, Saint Johnsbury, VT

Living and working in an online environment means that personal information and association information could be compromised at any time. You can deter hackers and others from stealing confidential data. This primer on password security, how to download apps and software, retrieve or delete content from a lost/stolen mobile device, and enact general security protocols will prepare your association and members should your data be compromised.

Saturna Island Room, Discovery Floor – Fairmont

CREA REALTOR Link® – What Next?

10:45 a.m. – 11:30 a.m.

Mary Van Buren, CREA Vice-President of Marketing and ITS, and Marc Lafrance, CREA Director of Product Management and Member Services

Come share with your REALTOR® association community colleagues success stories, lessons learned, and challenges faced from the launch of your new REALTOR Link® site. Share best practices and discuss new ideas with colleagues on how to optimize the platform to enhance member communication. Facilitated by Mary Van Buren and Marc Lafrance, this session is ideal for all Canadian association staff who want to discuss the long-term vision of REALTOR Link® as a vital member communication and collaboration tool.

Waddington Room, Convention Floor – Fairmont

NAR Update Lunch

11:45 a.m. – 1:15 p.m.

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

Regency Ballroom, Convention Level – Hyatt

Sponsored by: NAR Office of the CEO

CREA Update Lunch

11:45 a.m. – 1:15 p.m.

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

Plaza Ballroom, Plaza Level – Hyatt

Joint Legal Update

1:30 p.m. – 2:30 p.m.

Join NAR General Counsel Katie Johnson and CREA General Counsel Bill Harrington for an update on the legal issues impacting REALTOR® associations in both countries.

Regency Ballroom, Convention Level – Hyatt

Closing Session

2:30 p.m. – 2:45 p.m.

Regency Ballroom, Convention Level – Hyatt



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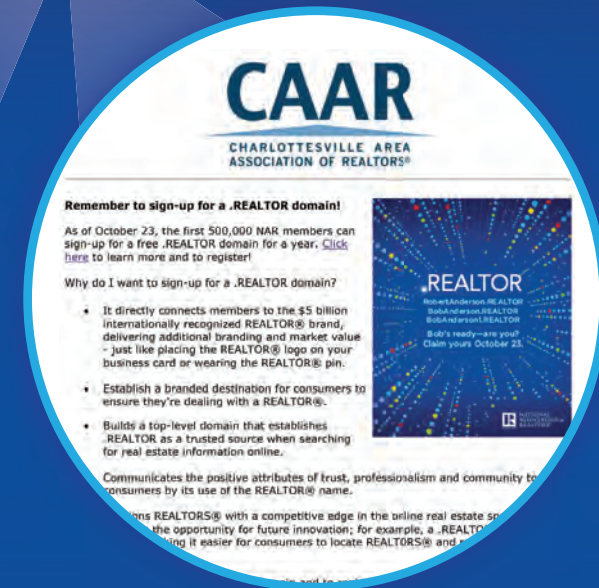
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