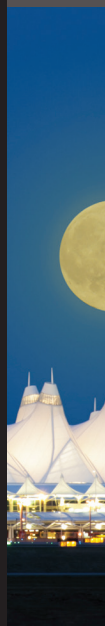


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2017 Association Executives Institute

March 17-20, 2017
Sheraton Denver
Downtown Hotel
Denver, CO



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NATIONAL
ASSOCIATION of
REALTORS®

Dear Association Executives:

THANKS to the excellent feedback each of you provided in the 2016 AE Institute post session evaluations , this year's Institute will be chock full of thought-provoking dialogue, new and innovative ideas, plus a few tried and true tips that will help you continue to grow and succeed as an AE.

Each year a group of your peers volunteers their time to help craft a relevant Institute curriculum and this year is no exception. The 2017 AE Institute Advisory Board thoughtfully selected session topics, and brainstormed speakers and delivery methods that would best suit your needs in the current REALTOR® association landscape.

The 2017 curriculum offers the following education tracks: Customer Service; Peer-to-Peer Game Changers; and Technology & Communications. The Advisory Board secured many speakers from within the industry and some from outside it, allowing us to peek behind the curtain of successful non-real estate organizations.

Your feedback also encouraged us to keep every track session at 60 minutes and to discontinue the sponsor walk-around lunch. In its place we're providing time for more networking and peer-to-peer idea exchange.

Mark your calendar for Wednesday, December 7, 12:00 p.m. CST. That's when online registration opens. See you in Denver next March!

On behalf of the AE Institute Advisory Board,



Laura Crowther, RCE

Chair, 2017 AE Institute Advisory Board

Table of Contents

Registration Hours.....	3
AE Institute Attire	3
Special Events At-A-Glance	4–5
RCE @ AEI.....	6
AE Fundamentals Sessions	7
CEO Program	8
Educational and Special Events.....	8–9
AE Institute Programming Tracks.....	9
AE Institute Course Schedule	10–18
Friday, March 17.....	10
Saturday, March 18 – RCE Apparel Day	11–14
Sunday, March 19 – AEI Apparel Day	15–18
Power Skills for Success	19
Certified Professional Standards Administration	20
Registration Made Easy.....	21

Registration Hours

Thursday, March 16	5:30 p.m. – 7:30 p.m.
Friday, March 17	7:30 a.m. – 5:30 p.m.
Saturday, March 18	7:30 a.m. – 4:00 p.m.
Sunday, March 19	8:00 a.m. – 3:00 p.m.

**An information desk will be available Monday,
March 20, 8:00 a.m. – 12:00 p.m.*

AE Institute Attire

The 2017 AE Institute attire is business casual. Denver in March can offer a variety of temperatures and elements. Be prepared for any conditions. A commemorative 2017 AE Institute jacket or vest can help keep you comfortable and mark your attendance. (Jacket: \$55 if preordered – \$60 if ordered on-site; vest: \$45 if preordered; \$50 if ordered on-site.) Purchases benefit the AE Professional Development Fund, which supports programming for all association executives.

Special Events At-A-Glance

AE Institute Welcome Lounge

Friday, March 17, 4:00 p.m. – 6:00 p.m.

Stop by for some refreshments and information about Denver and meet the 2017 AE Institute Advisory Board.

Sponsored by: The Colorado Association of REALTORS® and the Denver Metro Association of REALTORS®

AE Young Professional Network (YPN) Meet Up

Friday, March 17, 5:30 p.m. – 7:30 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 the industry.

RCE Apparel Day

Saturday, March 18

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



Opening Session

Saturday, March 18, 8:00 a.m. – 9:30 a.m.

The Opening Session is the official kick-off to the 2017 AE Institute. Come and meet the 2017 AEI team, and leave exhilarated by a keynote address from Joe Moglia, an executive leadership speaker who honed his message of the four-pillars of success through his own trials as a business leader and football coach. He is the current chairman of the board at TD Ameritrade and the head football coach of Coastal Carolina University. He was at Merrill Lynch for 17 years before becoming the CEO at TD Ameritrade where he grew its market cap from \$700 million to \$10 billion, and shareholders enjoyed a 500% financial return. As the Coastal Carolina coach, he led the team to two conference championships and two national playoffs, and was conference coach of the year, Big South co-coach of the year and three times named a finalist for national coach of the year. You'll also hear from 2017 NAR President Bill Brown, who'll offer some special remarks.

Grab-and-Go Lunch

Saturday, March 18, 12:15 p.m. – 12:45 p.m.

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

Networking Roundtables

Saturday, March 18, 12:15 p.m. – 1:15 p.m.

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

Special Events At-A-Glance

New AE Networking Reception **Saturday, March 18, 4:00 p.m. – 5:00 p.m.**

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

Icebreaker Reception **Saturday, March 18, 5:00 p.m. – 6:30 p.m.**

Join your friends and colleagues for this special Institute welcome reception where you can renew old friendships and create new ones in a relaxed environment.

State Chief Staff Meeting **Saturday, March 18, 1:30 p.m. – 4:00 p.m.**

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



AE Institute Apparel Day **Sunday, March 19**

Show your AE Institute spirit by sporting your commemorative 2017 AE Institute wear. (Jacket: \$55 if preordered – \$60 if ordered on-site; vest: \$45 if preordered; \$50 if ordered on-site.)

REALTOR® Party Breakfast **Sunday, March 19, 7:45 a.m. – 9:15 a.m.**

As a REALTOR® association executive, you know that politics plays an important role in your members' profession. Come enjoy breakfast and sharpen your political insights with a special keynote address by Douglas Brinkley, a history professor at Rice University and CNN presidential historian.

Sponsored by: REALTOR® Party

NAR Update Lunch **Sunday, March 19, 12:00 p.m. – 1:30 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 national counterpart.

Sponsored by: NAR Office of the CEO

Networking Roundtables/Workshop Sessions **Sunday, March 19, 3:15 p.m. – 4:15 p.m.**

Take some time to share tried and true solutions. These roundtables and workshops will help connect you to your peers where you'll learn about different experiences and perspectives in the REALTOR® association management world and the real estate industry.

RPAC Major Investor Reception **Sunday, March 19, 4:30 p.m. – 5:30 p.m.**

This special reception is for RPAC major investors.



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

RCE Exams

Candidates for the designation can take the exam while attending the 2017 AE Institute. Information about exam reservations will be sent to qualified designation candidates.

RCE Exam

Friday, March 17, 8:00 a.m. – 11:45 a.m.

RCE CAE Plus Exam

Friday, March 17, 8:00 a.m. – 9:45 a.m.

RCE Apparel Day

Saturday, March 18

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

RCE Overview and ADF Workshop

Saturday, March 18, 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.

RCE Designee "Early Access Pass" to Icebreaker Reception

Saturday, March 18, 4:00 p.m. – 5:00 p.m.

A special opportunity for RCE designees to network and renew friendships before the rest of the Institute registrants arrive at the Icebreaker. Canadian Real Estate Association CRAE designees are also invited to this special pre-Icebreaker reception.



AE Fundamentals Sessions

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

NAR Dues Policies and Dues Remittance Procedures

Saturday, March 18, 12:15 p.m. – 1:15 p.m.

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

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

NAR Policy 101

Saturday, March 18, 1:30 p.m. – 2:30 p.m.

Rodney Gansho, RCE, Managing Director, Member Policy, NAR

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

New AE Networking Reception

Saturday, March 18, 4:00 p.m. – 5:00 p.m.

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

I'm a New AE, Now What?

Sunday, March 19, 10:45 a.m. – 11:45 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.

NRDS and E-Commerce

Sunday, March 19, 2:00 p.m. – 3:00 p.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Financial Information Systems, NAR

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

Educational And Special Events

CEO Program Featuring the Disney Institute (\$300; pre-registration required)

Friday, March 17, 8:00 a.m. – 4:30 p.m.

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

The 2017 AE Institute Advisory Board is pleased to present the CEO Program, facilitated by the Disney Institute. The CEO Program will focus on the following three areas: leadership excellence, building collaborative cultures, and quality service. The CEO Program is where you need to be if you want to take your association to the next level.

Sponsored by: The Wisconsin REALTORS® Association

Certified Professional Standards Administration– (\$35)

Friday, March 17, 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; Patrick Reilly, RCE, Vice President, Member Services, New York State Association of REALTORS®

Attend the Professional Standards Administrator training and learn how to handle the complexities of professional standards administration, such as processing appeals and conducting hearings. You'll also learn about enforcement procedures and other legal ramifications. If you attend the entire day and complete and pass the professional standards exam, you will receive a certificate attesting to the fact you successfully completed the course. See page 20 for full description.

REALTOR® Party Immersion Day Training Friday, March 17, 8:30 a.m. – 3:00 p.m.

Join this session to break down what "advocacy" really means for REALTOR® associations. This interactive workshop will use association scenarios to simulate how to build an advocacy plan. Choose from the programs, tools and services highlighted in this training to create your plan for 2017 and beyond. Lunch provided.

e-PRO Day 1 – (\$75 – includes lunch) Friday, March 17, 8:30 a.m. – 4:30 p.m.

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

***CIPS Global Programs for Associations – (\$75) Friday, March 17, 8:30 a.m. – 12:30 p.m.**

Interested in developing or growing global programs in your association? The newly revised content provides in-depth education on developing and growing global programs that will help you prepare your members to succeed in the global marketplace. Association executives and staff interested in understanding the value of global programs at their association are welcome to register and attend. This course is required for association staff to earn the CIPS designation. It also counts as points toward the RCE designation and Core Standards. To learn more about how to earn the designation, visit www.realtor.org/ae_cips

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

CMLS Best Practices Friday, March 17, 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, employee satisfaction will increase, your volunteers will step up, and your organization will thrive.

Educational And Special Events

***Commercial Membership by Design – (\$75)** **Friday, March 17, 1:00 p.m. – 4:30 p.m.**

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

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

Realtors Property Resource® – Exclusive Association Resources **Friday, March 17, 3:00 p.m. – 4:00 p.m.**

Up your game and learn how RPR’s Dashboard equips AEs, GADs, and FPCs to be *The Voice for Real Estate®* and to meet Core Standards requirements through key features including Market Data and Economic Area Reports. We’ll show you the unique ways associations and REALTORS® use this exclusive member benefit in their business. We’ll put you and your members in the driver’s seat to be the trusted source of real estate information in your marketplace.

AE Institute Programming Tracks

Customer Service

Customer service is king, or at least it should be. How can you crown it king at your association? These sessions will help you hone your customer service skills and begin to develop an association customer service plan so that your members know you’re there for them and their success.

Peer-to-Peer Game Changers

We know we learn best from our peers. Take a few pages from their playbooks as you get an inside look at what your peers are doing across the country to remain innovative and member-focused. And learn how to take on some of these initiatives with little or no funding.

Technology & Communications

Learn how to make the most of new, affordable technologies so your members make the most of the marketplace. Discover the advantages of various communications vehicles and how to truly tailor your messaging to meet your audience’s needs. And find out more about the changing role of MLS in the real estate marketplace and association operations.

CEO Program Featuring the Disney Institute
(\$300; pre-registration required)
8:00 a.m. – 4:30 p.m.

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Sponsored by: The Wisconsin REALTORS® Association

RCE Exam
8:00 a.m. – 11:45 a.m.

RCE CAE Plus Exam
8:00 a.m. – 9:45 a.m.



Certified Professional Standards Administration– (\$35)
8:00 a.m. – 5:00 p.m.

REALTOR® Party Immersion Day Training
(includes lunch)
8:30 a.m. – 3:00 p.m.

e-PRO Day 1 – (\$75 – includes lunch)
8:30 a.m. – 4:30 p.m.

CIPS Global Programs for Associations – (\$75)
8:30 a.m. – 12:30 p.m.

CMLS Best Practices
9:00 a.m. – 4:00 p.m.

Commercial Membership by Design – (\$75)
1:00 p.m. – 4:30 p.m.

Realtors Property Resource® – Exclusive Association Resources
3:00 p.m. – 4:00 p.m.

AE Institute Welcome Lounge
4:00 p.m. – 6:00 p.m.

Sponsored by: The Colorado Association of REALTORS® and the Denver Metro Association of REALTORS®

AE Young Professional Network (YPN) Meet Up
5:30 p.m. – 7:30 p.m.

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Opening Session 8:00 a.m. – 9:30 a.m.

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Build Bridges with Brokers 9:45 a.m. – 10:45 a.m.

Adorna Carroll, ABR, CIPS, CRB, e-PRO, GRI, SRS, SFR, President, Dynamic Directions, Inc., Newington, CT

Customer service in tomorrow's association requires a different type of effort from today's CEOs. Building and cultivating relationships with broker/owners, managers, and team leaders is essential to engage folks in strategic initiatives, business planning, and professional development programs. Email, phone calls, and texts are fine for follow up, but you may miss the mark if there isn't a personal relationship. Let Adorna show you a different approach to ensure that those relationships start to prosper.

What Members Really Want 9:45 a.m. – 10:45 a.m.

Leigh Brown, ABR, CIPS, CRS, e-PRO, SFR, SRES, Broker/Owner, RE/MAX Executive Realty, Charlotte, NC

Why do some associations grow while others remain stagnant? Why do some associations have flourishing committees, new leadership and excitement, while others recycle the same old, same old? Leigh will dispense some ideas to help you create the "it" factor for your volunteer leaders and members so they feel vested and the association thrives.

What Will the Industry Look Like in the Next 10 Years? 9:45 a.m. – 10:45 a.m.

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

REAL Trends President Steve Murray will share his thoughts on where our industry will be in 10 years. He'll examine what is and isn't working today, what needs to change, and the role REALTOR® associations and MLSs will play over the next decade. Steve will bring food for thought based in his book *Game Changers: The Unfounded Fears and Future Prosperity of the Residential Real Estate Industry*.

Can You Hear Me Now? Three Essential Communication Skills Effective Leaders Must Master 11:00 a.m. – 12:00 p.m.

Terry Watson, ABR, ABRM, AHWD, e-PRO, GREEN, GRI, PMN, SRES, President, Easify, Inc., IL

Whether you are an AE or a presidential candidate, messaging and communication are critical if you want to move the needle in your organization. Poor communication is repeatedly cited as the leading factor in the failure of large and small change efforts. Ironically, a few simple tweaks can provide enormous results. This presentation will give you tools to effectively connect with others so you are heard and understood.

Build Your Community Brand 11:00 a.m. – 12:00 p.m.

Clint Skutchan, RCE, e-PRO, CEO, Ft. Collins Board of REALTORS®, CO

Find out how to leverage advocacy and education efforts to build a community brand for your association that will improve the REALTOR® image amongst consumers, and position your association to become a key influencer. Determine which of your key programs and services hold value in the community, and then put your community branding efforts on the fast track.

Embracing MLS Consolidation and Living to Tell

11:00 a.m. – 12:00 p.m.

Facilitator: Kevin McQueen, President, Focus Forward Consulting, Inc., Denver, CO

Panelists: David Bennett, RCE, CAE, CEO, Pinellas Suncoast Association of REALTORS®, FL; Carrie Kendall, RCE, Executive Officer, Indiana Regional MLS/Lafayette Regional Association of REALTORS®, IN; Anne Marie Matteo, Esq., RCE, CAE, CEO, Suburban West REALTORS® Association, PA

You have choices about the future of your MLS, and that future may mean consolidation. Understand why MLS consolidation is not a death sentence. Hear from your peers about the impact of regionalization and take away best practices that can help you prepare to consolidate. Leave with clarity on your options and a strategy to architect your next steps.

The Power and Pitfalls of Distance Education

11:00 a.m. – 12:00 p.m.

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

Ask five people what “distance education” means and you might get five different answers. In distance education, one size does not fit all. Get comfortable with the basic concepts of distance learning and the difference between classroom training and distance training. Receive tips and techniques on how to assess your current distance program (if you have one), and how to implement a program if you currently do classroom-based training.

Grab-and-Go Lunch

12:15 p.m. – 12:45 p.m.

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

Networking Roundtables

12:15 p.m. – 1:15 p.m.

Take some time to share tried and true solutions while learning new ones at these networking roundtables. These roundtables will help connect you to the REALTOR® association management world and the real estate industry, to help you do your job better.

NAR Dues Policies and Dues Remittance Procedures

12:15 p.m. – 1:15 p.m.

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

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

Dancing with a Cactus: Dealing with Difficult People

1:30 p.m. – 2:30 p.m.

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

Dealing with some folks is like dancing with a cactus: no matter how you approach them you almost always get hurt. What if you could move beyond “just tolerating them?” What if you could implement real strategies and techniques to handle a toxic team member or cranky customer? Learn what drives difficult people and some solid strategies so you can “dance” with them.

Build, Lead, and Grow Your Team

1:30 p.m. – 2:30 p.m.

Marc Cunningham, President, Grace Property Management & Real Estate, Thornton, CO

A team's success is the leader's responsibility. Your ability to effectively lead your team is not based on your personality or your charisma. It is based on you bringing three things to your team every day: energy, clarity, and accountability. Whether you have 1 or 100 employees, effective leadership and management is as simple as engaging 10 specific behaviors. Join Marc to learn how.

Platforms, Portals, and Publishers, Oh My!

1:30 p.m. – 2:30 p.m.

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

Panelists: Anne Marie DeCatsye, CEO, Charlotte Regional REALTOR® Association, NC; Rebecca Jensen, President/CEO, MRED, Lisle, IL; Alex Lange, President and CEO, Upstream, Dallas, TX; Gene Millman, ABR, AHWD, CRS, GRI, Broker, Millman West Real Estate, Hockessin, DE

Some call them disruptors, others call them progress and the new way. What are AMP, Upstream, RETS API, and more? Attend this session for an invigorating discussion on these current industry initiatives and how they impact members, and the association and MLS infrastructure.

NAR Policy 101

1:30 p.m. – 2:30 p.m.

Rodney Gansho, RCE, Managing Director, Member Policy, NAR

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

Innovative Customer Service for Associations

3:00 p.m. – 4:00 p.m.

Juanita McDowell, e-PRO, President, InMotion Consulting, Atlanta, GA

Discover how to enhance your service sense and build teamwork as you take customer service to new levels in your organization. This session delivers new and cutting edge research that can be used to improve customer relations from top to bottom, along with the tools to help you measure your success.

Create a Winning Education Program

3:00 p.m. – 4:00 p.m.

Dwayne Carte, RCE, ABR, AHWD, BPOR, CIPS, e-PRO, GREEN, MRP, RSPS, SFR, SRES, SRS, Director of Commercial and Global, Greater Tampa Association of REALTORS®, FL

The education program of the past doesn't work with today's REALTOR®. Education directors and CEOs need to think more like business owners rather than association staff. Programs, along with instructor compensation, have to change. Through the use of a case study, watch how one association turned things around in 12 months and how you can create a marketing strategy for your education program.

Spokesperson Training for AEs

3:00 p.m. – 4:00 p.m.

Peter Mosca, CCFA, e-PRO, GREEN, SFR, SRES, Global Director PR & Executive Communications, Century 21, Howell, NJ

Despite your best efforts to prepare your volunteer leaders to talk with the media, there will be times when you will need to step up and leverage the opportunity to voice REALTOR® messages to key external and internal audiences. If you want more confidence and competence when presenting those messages, this session is for you.

Customer Service

Peer-to-Peer Game Changers

Technology & Communications

Advocacy: Three Ways to Act 3:00 p.m. – 4:00 p.m.

Facilitator: Susie Helm, RCE, Vice President, Advocacy Operations & Communications, NAR

Panelists: Brandon Alderete, Political Affairs Director, Texas Association of REALTORS®; Kipp Cooper, RCE, CEO, Kansas City Regional Association of REALTORS®, KS; Elizabeth Hancock Greenfield, Vice President, Government Affairs and Member Services, Richmond Association of REALTORS®/CVR MLS, VA

Do members react to association advocacy messages and “Calls for Action?” Do they understand the issues and are they inspired to respond when needed? Gain tips and tools to prompt members to act on community outreach needs and “Calls for Action” when you need them to act. And learn how to ensure your message reaches members and elected officials in a timely and effective manner. Pick up ideas on programs that comply with Core Standards and how your association can engage in “act” activities.



New AE Networking Reception 4:00 p.m. – 5:00 p.m.

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

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Icebreaker Reception 5:00 p.m. – 6:30 p.m.

Join your friends and colleagues for this special Institute welcome reception where you can renew old friendships and create new ones in a relaxed environment.



Customer Service ■

Peer-to-Peer Game Changers ●

Technology & Communications ▲

REALTOR® Party Breakfast 7:45 a.m. – 9:15 a.m.

As a REALTOR® association executive, you know that politics plays an important role in your members' profession. Come enjoy breakfast and sharpen your political insights with a special keynote address by Douglas Brinkley, a history professor at Rice University and CNN presidential historian.

Sponsored by: REALTOR® Party

The Data Driven Campaign – Going to the Next Level 9:30 a.m. – 10:30 a.m.

Facilitator: Steve Francks, RCE, CAE, CEO, Washington Association of REALTORS®

Panelists: Gerry Allen, Managing Director, Campaign Services, NAR; Joe Goode, American Strategies, Washington, DC; Drew Brighton, Co-Founder and Partner, TargetSmart, Washington, DC

Data is crucial to win campaigns. Learn how to use data in targeted member and consumer messages, and when to use social media to deliver the right message to the right people. Understand the methods of polling and how associations use it to engage in successful campaigns. Pick up ideas on programs that comply with Core Standards and how your association can engage in "vote" activities.



How to Be Small and Mighty with Core Standards 9:30 a.m. – 10:30 a.m.

Facilitator: Alice Martin, RCE, GRI, AHWD, CEO, Martin Consulting Solutions, Chicago, IL

Panelists: Maranda DeSanto, RCE, CEO, Duluth Area Association of REALTORS®, MN; Carol Lawhon, CEO, Tehachapi Area Association of REALTORS®, CA; Gail Pyszka, CEO, Illini Valley Association of REALTORS®, IL; Denise Schultz, RCE, CEO, Lakes Area REALTORS® Association, WI

If your association is small, you may worry that it can't meet the Core Standards due to limited staff and volunteers. Find out how small associations do it and do it well. Take a look at some successful approaches to bring members value and how you can do the very same thing. Learn how to stretch your resources and motivate members to get involved.

Anatomy of a Consumer Outreach Program 9:30 a.m. – 10:30 a.m.

Facilitator: Nobu Hata, Director, Member Engagement, NAR

Panelists: TJ Doyle, Director, Executive and Digital Communications, NAR; David Greer, Vice President, Consumer and Media Communications, NAR; Sara Wiskerchen, Managing Director, Media Communications, NAR

Learn how you can nail down the consumer outreach Core Standards requirement. Get end-to-end, A-Z tips on a sustainable consumer campaign process. From message genesis and social media, to leadership amplification and member buy-in, you will take away future-proof consumer outreach skills that you can immediately put to use.

PCI, PII, Data Security – What Does It All Mean for Associations?

9:30 a.m. – 10:30 a.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Financial Information Systems, NAR; Lena Singer, Managing Director, Business Applications, NAR

Learn definitions to the data security buzz words we hear every day – PCI, PII, password/passphrase, spoofing, spear phishing, internet of things, etc. You'll hear about the data breaches in the news and how they happened, the areas most vulnerable in handling member data, and the technological as well as human steps to take to keep your data safe from attack.

AEs Are from Mars and Volunteers Are from Venus

10:45 a.m. – 11:45 a.m.

Evan Fuchs, ABR, CRS, GRI, RSPS, SRS, e-PRO, Designated Broker, Trainer, Bullhead City, AZ

The relationship between staff and volunteer leaders can sometimes be tricky, but there are some simple steps you can take to better collaborate with members and leaders. Listen to proven communication, leadership, and team building strategies that can help both parties work better together to understand and serve member needs. Walk away with five action steps to ensure your team's success.



Two Heads Are Better than One

10:45 a.m. – 11:45 a.m.

Ginger Downs, RCE, CAE, CIPS, CEO, Chicago Association of REALTORS®, IL

AEs are always looking for ways to enhance customer service to members. Discover how collaborating with other organizations can help you address the needs of specific membership niches, and help increase their satisfaction with the association. Then learn how to communicate those successes to your members.

Serve Members with Market Data

10:45 a.m. – 11:45 a.m.

Lawrence Yun, Chief Economist, NAR; Jonathan Smoke, Chief Economist, [realtor.com](https://www.realtor.com)®

A duo of economists will converse about market inventory, the use of market statistical data to engage members, and the resources available to you through both NAR and [realtor.com](https://www.realtor.com)®. See how information at your fingertips can help you understand current trends driving the housing market, and how you can deliver market trends information to members.

I'm a New AE, Now What?

10:45 a.m. – 11:45 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.

NAR Update Lunch

12:00 p.m. – 1:45 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 national counterpart.

Sponsored by: NAR Office of the CEO

Succession Planning Success

2:00 p.m. – 3:00 p.m.

Christine Todd, RCE, CAE, CIPS, Association Consultant, Dynamic Directions Inc., Gloucester, MA

An increase in retirees, job promotions, and unplanned departures are all opportunities for you to teach your board of directors about succession planning. When any of those situations occur, it is incumbent upon the board to act quickly and with certainty to ensure a smooth transition and continue service to the members. Let a colleague who made this journey give you tips and resources to create a succession plan blueprint.



Economic Development: Relevance Beyond the MLS

2:00 p.m. – 3:00 p.m.

Steve Bois, CEO, Rockford Area REALTORS®, IL

Many associations are searching for ways to remain relevant beyond the MLS. Economic development engagement allows associations to position themselves as community leaders for prosperity, quality of life, and economic vitality. It also allows them to help their market economy thrive while strengthening the REALTOR® brand. Learn how to get started, regardless of your association size or capital.

Show Me the Money – Unique RPAC Fundraising Ideas

2:00 p.m. – 3:00 p.m.

Facilitator: Travis Kessler, RCE, CAE, CEO, Texas Association of REALTORS®

Panelists: Drew Brighton, Co-Founder and Partner, TargetSmart, Washington, DC; Ginger Downs, RCE, CAE, CIPS, CEO, Chicago Association of REALTORS®, IL; Nancy Glaesemann, Association Executive, Western Magic Valley REALTORS®, ID; Jennifer Zeller, Executive Officer, Midwestern Ohio Association of REALTORS®

Immerse yourself in successful best-practice fundraisers, and learn how to build engagement plans to target different audiences. Small associations will share their tips on how to get your event off the ground and increase member involvement. Walk away with ideas to get the biggest bang for your buck in your fundraising. Get a glimpse of future RPAC fundraising tools and how to use your member data to send customized targeted messages to members to increase RPAC participation. Pick up ideas on programs that comply with Core Standards and how your association can engage in “invest” activities.

Customer Service

Peer-to-Peer Game Changers

Technology & Communications

NRDS and E-Commerce

2:00 p.m. – 3:00 p.m.

Chris DeRosa, RCE, CAE, IOM, Managing Director, Financial Information Systems, NAR

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

Networking Roundtables

3:15 p.m. – 4:15 p.m.

Take some time to share tried and true solutions while learning new ones at these networking roundtables. These roundtables will help connect you to the REALTOR® association management world and the real estate industry, to help you do your job better.



Workshop: Be the Front Line for Your Members

3:15 p.m. – 4:15 p.m.

Andrew Scoulas, Information and Project Specialist, NAR; Hathaway Hester, Information and Digitization Specialist, NAR

When your members feel valued, they will value their organization. Learn how you can increase member satisfaction through exemplary customer service. Whether you are implementing your association's first customer service program or need some fresh tools to enhance your arsenal, gain practical ideas for successful customer service that you can implement immediately and on any budget.

Workshop: Consumer Advocacy Outreach – The Next Peak of Advocacy

3:15 p.m. – 4:15 p.m.

Coleman Bass, Communications Manager, TargetSmart; Erin Murphy, Senior Representative, Consumer Advocacy Outreach, NAR

Cut through the chatter and learn how to engage consumers in your state and local advocacy efforts. Discover how your association can contribute content to the HomeownershipMatters.REALTOR website and give consumers in your community a voice on public policy issues affecting homeownership.

RPAC Major Investor Reception

4:30 p.m. – 5:30 p.m.

This special reception is for RPAC major investors.

Power Skills for Success: How Top AEs Perform at Higher Levels

Monday, March 20, 7:30 a.m. – 1:00 p.m.

Facilitator: Jerry Matthews, Advisor, Windermere, FL

Highly successful AEs are more than competent. They have intangible skills that set them apart and allow them to excel. Learn these unique capabilities revealed by the successful AEs themselves. No theory – just real-world experience, delivered in a fast-paced session facilitated by Jerry Matthews and featuring 10 successful AE presenters, including NAR CEO Dale Stinton.

Note: This special presentation is for all AE Institute attendees and includes breakfast and lunch.

Bring Updated RLP to Your Association!

The REALTOR® Leadership Program (RLP) sets your leadership on the path to success in their year in term. Newly updated content will familiarize leadership with relevant association issues and will fulfill Core standards requirement of providing volunteer leadership development!

Learn online:

Leadership 100: On the Path to Leadership – Now FREE through Center for REALTOR® Development, this online course is a great starting point for current or aspiring leaders.

Learn with a trained facilitator:

Leadership 200: Becoming a Leader – Interactive classroom-style course for new committee or board members; covers staff/volunteer roles and responsibilities, building consensus, and more.

Leadership 300: Enhancing Leadership Skills – Building off of skills addressed in Leadership 200, this course covers duties of directors, strategic planning, meeting management and communication.



**Learn more about hosting RLP at your association by
visiting www.realtor.org/RLP today!**

Friday, March 17, 8:00 a.m. – 5:00 p.m. (\$35)

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

Professional Standards Certificate Requirements

All attendees must attend all day and pass 75% of the comprehensive exam conducted at the end of the program. Those who pass the test are awarded a certificate of completion. The test is distributed at the end of classroom instruction on Friday, March 17. Students complete the exam in class and receive their grade and certificate before leaving. **Attendance is worth 10 points on the RCE Applicant Data Form.**

History and Introduction

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



Due Process and the Function of the Grievance Committee

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

The Hearing Process

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

Article 17 and Arbitration

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

Procuring Cause and Policy Resources

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

Expediting Professional Standards

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

Final Exam (open book)

Don't worry, you'll pass!

Registration Made Easy

Tuition

All registrations for the 2017 Institute must be completed on-line. On-line registration opens at 12:00 noon CST on Wednesday, December 7, 2016. Registrations will not be accepted prior to that date. To register on-line go to www.realtor.org/aeihome.nsf. Be an early bird and save on tuition. Register before January 31, 2017, and save \$30 on Institute tuition. Registration is \$545 before January 31, and \$575 after that date. AE Institute tuition includes attendance at all courses and general sessions (except the CEO Program, Certified Professional Standards Certification, CIPS Global Programs for Associations, Commercial Membership by Design, and e-PRO courses), breakfast Saturday through Monday mornings, Saturday night's Icebreaker Reception, lunch on Saturday, Sunday, and Monday.

Hotel Accommodations

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

Sheraton Denver Downtown Hotel

Standard: \$143.00 single/double

Attendees will book their hotel reservations on-line, as they register on-line for the AE Institute. Do not contact these hotels directly to secure hotel accommodations. The only way to book a hotel room is via the on-line AE Institute registration process. The deadline to confirm your housing is February 24, 2017.

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

Andra Zarins

Housing Manager azarins@realtors.org

Charlotte Wroblewski

Registration Manager cwroblewski@realtors.org

QUESTIONS?

**Call NAR Information Central
at 800/874-6500.**

NAR Discounts Mean Lower Airfares To Denver!

United Airlines, NAR's Official Airline



Receive a 2 to 10% discount on United Airlines, United Express, or other airlines operated by and branded United Express. Discounts also apply to United codeshare flights operated by Lufthansa and All Nippon Airways. Good for travel three days before and three days after the meetings.

NAR's United Airlines discount can be used when booking on-line at www.united.com only. Be sure to enter tour code **ZX4D414315** in the Offer Code box to get the discount.

Tickets may also be booked by calling the United Meetings Desk at 800-426-1122 (in the USA or Canada). The Meetings Desk is available from 7:00 a.m. – 9:00 p.m. CT, Monday through Friday, and 8:00 a.m. – 6:00 p.m. CT Saturday and Sunday.

Delta Air Lines



Receive a 2 to 10% discount on Delta Air Lines' special discounted airfares for AE Institute.

Visit www.delta.com/booking and enter Meeting Event code – **NMNUK** – and continue with the booking process to purchase your ticket.

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

Time Zone

Mountain time zone

Temperature

Denver in mid-March averages a low around 30 degrees Fahrenheit and a high temperature around 55 degrees Fahrenheit. Like any location, the weather can change at a moment's notice. Be prepared for inclement weather on any given day.