

2024 AEI Education Session Overview

TUESDAY, MARCH 12, 2024:

8:00am – 5:00pm: Professional Standards Certification Training

Speakers:

- Diane Mosley, Director of Training and Policy Resources, National Association of REALTORS®
- Diane Disbrow, Director, Shore Real Estate Academy

9:00am – 12:00pm: MLS Programming

Speakers:

- Rodney Gansho, Director of Engagement, National Association of REALTORS®

1:00pm – 1:45pm: AE Fundamentals – I'm a New AE, Now What?

Speakers:

- Theresa Hatton, CEO, Massachusetts Association of REALTORS®

1:00pm – 1:45pm: REALTOR® Party Training

Speakers:

- Emily Newman, Director of Advocacy Public Affairs, National Association of REALTORS®

1:00pm – 2:00pm: CREA New EO/Association Staff Training

2:00pm – 3:00pm: RCE ADF Workshop

Speakers:

- Sarah Rayne, CEO, Howard County Association of REALTORS®
- Maria Brogan, CEO, The Northeast Association of REALTORS®

2:00pm – 4:00pm: Human Resources (HR) Training Courses

Speakers:

- Carole Kaptur, Director of HR Outreach, National Association of REALTORS®

6:30pm – 9:30pm: Welcome Reception

Venue 808

WEDNESDAY, MARCH 13, 2024 (AEI APPAREL DAY):

7:30am – 8:30am: AE Fundamentals – Core Standards 101

Speakers:

- Dan Doepke, Director of Member Policy, National Association of REALTORS®
- Andrew Scoulas, Association Information and Resource Manager, National Association of REALTORS®

8:30am – 9:45am: Opening Session

Speakers:

- John Gormley, CEO, Mainstreet Organization of REALTORS®
2024 AE Institute Advisory Board Co Chair
- Chris Guerette, CEO, Saskatchewan REALTORS® Association
2024 AE Institute Advisory Board Co Chair
- Tracy Kasper, President, National Association of REALTORS®
- Larry Cerqua, Chair, Canadian Real Estate Association

Keynote Session: Becoming an Idea Factory: How to Turn Yourself (And Your Organization) Into an Innovation Machine

Speaker:

- Kyle Scheele, Speaker, Author

Description:

If there is one belief that is holding you back from getting the most out of your team, it's this one: some people are creative, and some people aren't. That belief is based on outdated ideas about what creativity means, where it comes from, and who gets to harness it. The truth is creativity is a skill like any other: it can be learned. In the same way that we teach employees how to track expenses, process invoices, and jiggle the lock just right to get into the supply closet, we can teach them how to be more creative, how to have better ideas, and how to build a culture where innovation is a natural byproduct. In this talk, Kyle will:

- Inspire audience members to harness their own capacity for creativity and innovation.
- Give practical tips for how to get more (and better!) ideas out of yourself and your team)
- Share the five things that every idea needs
- Help you avoid common idea-killers in your organization

10:00am – 11:30am: NAR Legal Seminar for AEs

Speakers:

- Leslie Muchow, General Counsel & Vice President of Legal Affairs and Antitrust Compliance, National Association of REALTORS®

10:00am – 11:30am: CREA Legal Update

11:45am – 1:00pm: AEI Welcome Lunch

1:15pm – 2:00pm: Breakout Session: MLS Session

1:15pm – 2:00pm: Breakout Session: Communicating and Operating Through Crisis

Speakers:

Tessa Hultz, Seasoned Association Executive

David Stark, Chief Public Affairs and Communications Officer, Bay East Association of REALTORS®

Description:

Explore how associations handle industry-critical crises and issues. Learn from real world examples to understand how association leadership and staff can effectively collaborate with, and even partner with, external resources to address and resolve issues. Learn how to establish an action plan amid a crisis, and what resources you may need to help you through it.



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1:15pm – 2:00pm: Breakout Session: Lessons Learned from Foreign Buyer Legislation

Speakers:

- Trevor Koot, CEO, British Columbia Real Estate Association
- Linda Kristal, Vice President of Advocacy, Canadian Real Estate Association
- Sanjay Wagle, Senior Vice President of Government Affairs/Chief Lobbyist, California Association of REALTORS®

Description:

The real estate market on both sides of the border has been significantly influenced by overseas buyers. In response, federal and state/provincial governments have introduced legislation to curb or eliminate the impact of foreign buyers on local markets. Learn the outcomes of these efforts and which foreign markets pose the most significant challenges presently and in the future. See the influence that foreign buyers have in markets across North America, and how government legislation addressing foreign buyers can help and/or hinder the real estate market

1:15pm – 2:00pm: Breakout Session: Managing the Emotional Toll Through Healthy Self Identity

Speaker:

- Luke DeLaVergne, Licensed Marriage, and Family Therapist (LMFT)

Description:

As association staff, you look out for the well-being of many. It's equally important to take care of your own mental health. A strong self-identity that encompasses your beliefs, values, self-esteem, and self-image are crucial for personal well-being and positive relationships. Learn how to nurture a healthy self-identity for better mental and emotional health and life satisfaction. Take this time to learn to identify stress triggers and how to cope with stressful situations, as well as how to set healthy boundaries, define your values, challenge limiting beliefs, and cultivate authenticity.

1:15pm – 2:00pm: State AE Meeting

Speakers:

- Jill Beck, Chair, 2024 State AE Forum
- Mark Fisher, Vice Chair, 2024 State AE Forum

2:15pm – 3:00pm: Networking Roundtables & Events

2:15pm – 3:00pm: AEI Charity Project with Operation Hope

Description:

Operation Hope North County offers a safe, caring, and supportive environment to families with children and single women experiencing homelessness as they rebuild their lives and reclaim independence.

3:15pm – 4:15pm: CREA Update

4:30pm – 6:00pm: DEI In Everything Room

The DEI in Everything Networking Room is a comfortable, open, and safe space for attendees to meet up, share ideas, relax, and network with peers on topics related to all things Diversity, Equity, and Inclusion. Snacks will be available each day beginning shortly before the programming begins.



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THURSDAY, MARCH 14, 2024 (RCE APPAREL DAY):

7:30am – 8:30am: AE Fundamentals – NAR Dues Policies & Procedures

Speakers:

- Patricia Garcia, Director of Dues Compliance and REALTOR® Relief Foundation Services, National Association of REALTORS®

8:30am – 9:30am: General Session & AE Recognition

Your peers have done some amazing things over the past few years, so we'll take some time to honor them appropriately.

General Session: Exploring Culture at Your Association

Speaker:

- Dr. Shaun Harper, Clifford and Betty Allan Chair in Urban Leadership, University of Southern California

9:45am – 10:30am: Breakout Session: Governance 360: From Minor Changes to Comprehensive Reviews

Speakers:

- Carole Ann Burrell, CEO, REALTOR® Association of Hamilton-Burlington
- Jessica Coates, CEO, Sacramento Association of REALTORS®
- Terrie Suit, CEO, Virginia REALTORS®

Description:

Struggling with governance challenges in your association? Whether it's conflicting policy manuals and bylaws, barriers to diverse volunteer leadership, or the need for a comprehensive governance review, join a panel of experienced peers to learn how to successfully resolve these issues. Learn how to strategically work with members to achieve changes to bylaws and policy manuals, and complete and effectively communicate a comprehensive governance review.

9:45am – 10:30am: Breakout Session: AMS Best Practices – Elevate Your Association and Embrace Transitions

Speakers:

- Neil Collins, Chief Executive Officer, Santa Clara County Association of REALTORS®
- Emily Chenevert, Chief Executive Officer, Austin Board of REALTORS®
- Katie Fletcher, Vice President of Operations, Sierra Nevada REALTORS®
- Mike Valerino, Chief Executive Officer, Akron Cleveland Association of REALTORS®

Description:

Tap into the potential of your association management system (AMS) and take your association to new heights. Whether you're considering a switch or already using your preferred AMS, this is your chance to explore how to use these systems to their maximum potential. The right AMS can streamline association operations and boost engagement. Attend this session and learn the right questions to ask so you can overcome your AMS hesitation with strategies for change.

9:45am – 10:30am: Breakout Session: Understanding Economic Indicators to Prepare Associations for the Future.

Speakers:

- Dr. Jessica Lautz, Deputy Chief Economist and Vice President of Research, National Association of REALTORS®

Description:

Economics not your thing? Let Jessica make it your thing! Let her teach you about the key

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indicators shaping the real estate industry and how they can help you prepare your association for the future. She'll share why government spending, consumer spending, and price/wage indices are important to members. She'll also help you understand the current housing shortage, local supply and demand factors, and what essential information can help predict change.

9:45am – 10:30am: Breakout Session: Attracting and Retaining Talent in the Changing World of Work

Speaker:

- Al Dea, Founder, Betterwork Labs

Description:

Workforce demands and expectations are swiftly changing; don't let your association get left behind. AEs play a vital role in shaping the future of their associations and must proactively invest in their talent and culture to attract and retain staff and improve performance. Gain a greater understanding of the evolving landscape of the workplace, its impact on your association, and how to adapt to it. Take away proactive strategies to attract and retain talent, along with practical actions to enhance organizational culture and foster a productive, engaged, and high-performing workplace.

10:45am – 11:30am: Breakout Session: Succession Planning: Managing Staff Turnover and Building Future Leaders

Speakers:

- Stephanie Bloodworth, COO, Cape Fear REALTORS®
- Nick Kremydas, CEO, South Carolina REALTORS®
- Michelle Mills Clement, CEO, Chicago Association of REALTORS®
- Janice Myers, CEO, Ottawa Real Estate Board

Description:

The COVID19 pandemic and the impending wave of Baby Boomer retirements have made succession planning crucial for organizations. This session explores how CEOs can prioritize creating a plan amid staff turnover challenges, how to tap and develop talent amongst existing staff, and what to do if you're a staff specialist aiming to be a REALTOR® Association CEO one day. Gain tips from your colleagues who have first-hand experience and successes in these areas.

10:45am – 11:30am: Breakout Session: Building and Executing Your Value Proposition

Speakers:

- John Gormley, CEO, Mainstreet Organization of REALTORS®

10:45am – 11:30am: Breakout Session: AI in Real Estate: The Good, The Bad, and The Ugly!

Speaker:

- Jeff Turner, Co-founder, Tangilla

Description:

Join this enlightening session on the burgeoning intersection of artificial intelligence (AI) and the real estate industry. As AI continues to revolutionize various sectors, its impact on real estate is undeniable. It presents a complex mix of positive developments, potential pitfalls, and ethical considerations. Learn the uses of AI in three areas of real estate to develop a well-rounded understanding of AI for members and staff. See how the MLS world is embracing AI as well, and how when you apply AI to your daily workload you can improve your day-to-day efficiency.



10:45am – 11:30am: Breakout Session: When Leaders Become Liabilities

Description:

To err is human... but sometimes error becomes a major liability for associations, and the leaders who err can be held accountable. This session will highlight the difference between error and major organization liabilities, and how to take the necessary steps to protect the association and members during times of major upheaval. Explore what volunteer leader traits may be a tangible threat to the association. Then learn the appropriate steps to navigate and communicate through the storm, including how to press reset after a dramatic change has occurred.

11:45am – 1:00pm: REALTOR® Party Luncheon

Description

Mix it up and sit it with AEs you don't know! Then, take a listen to what the advocacy gurus have to say about the political landscape and what members can expect during this U.S. election year.

Sponsored By: REALTOR® Party

1:15pm – 2:00pm: Breakout Session: The 3 C's of Happy Volunteers – Comfort, Convenience, Connection

Speaker:

- Dana Litwin, CEO, Dana Litwin Consulting

Description:

Keep and attract the best talent in your volunteer pool by understanding “The 3 C's of Happy Volunteers.” Learn some practical solutions to boost volunteer engagement and unlock volunteer potential, and how to apply these principles in everyday interactions. This includes building community, trust, and enhancing DEI initiatives. When you understand and practice the “3 C's,” you'll enhance your organizational capacity and effectiveness, elevate volunteer satisfaction, and staff support, and foster strong connections and commitment to the association's mission.

1:15pm – 2:00pm: Breakout Session: More Than Status Quo – Tech Solutions to Association Challenges

Speakers:

- Wyndi Austi, CEO, Ventura County Coastal Association of REALTORS®
- Deborah Boza-Valledor, COO/CMO, Miami Association of REALTORS®
- David Corey, CEO, Victoria Real Estate Board
- Leo Mofunanya, Senior Director of Digital Strategy & Operations, Northern Virginia Association of REALTORS®
- Kat Newel, VP of Business Innovation, Real Estate Board of Greater Vancouver
- David Salvatore, CEO, Manitoba Real Estate Association
- Sam Scott, Director of Information, Houston Association of REALTORS®

Description:

Want to know what cool stuff associations are doing with technology? Get a rapid download as three American and three Canadian AEs highlight their tech successes in five minutes or less. They will offer insights on how to create tech products to solve common problems big and small, and how to improve the member experience and increase your association's value proposition along the way.



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1:15pm – 2:00pm: Breakout Session: Transformation Through Legislation: Own it or Avoid it!

Description:

Legislation can shape everything from how REALTORS® do business, to if they can even do it all. And in the advocacy arena, there are not many unique issues. In this Ted Talk-Style session, REALTOR® association advocacy experts from the U.S. and Canada will share the top issues to watch for, and how to prepare when either threat or opportunity come knocking. This includes how to build key contacts with REALTOR® association experts who have faced similar battles. By the end of this session, you'll have a better understanding of the regulation trends sweeping across the U.S. and Canada, and the confidence to lead discussions with members and staff on urgent advocacy topics.

1:15pm – 2:00pm: Breakout Session: Economics of a Brokerage

Speakers:

- Tim Hudak, CEO, Ontario Real Estate Association
- D. Patrick Lewis, Broker, Realty Executives Phoenix
- Brad Mitchell, CEO, Alberta Real Estate Association
- Troy Palmquist, Doora Properties
- Tommy Thomson, CEO, North San Diego County REALTORS®

Description:

The brokerage business has changed significantly throughout past years as business models evolve, new models are created, and agent demands change. How are brokers keeping pace? What income streams are important to them, and what do associations need to know about their businesses to best partner with them for success? Hear what your brokers need from you to stay relevant and successful, and how your association's business plan impacts them. Discover potential ways to work with brokerages to create meaningful member benefits where everyone wins.

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FRIDAY, MARCH 15, 2024

7:30am – 8:30am: AE Fundamentals – M1/ECommerce

Speakers:

- Chris DeRosa, Member Information and ECommerce Product Leader, National Association of REALTORS®

8:30am – 9:15am: Joint Economic Update

Speakers:

- Dr. Lawrence Yun, Chief Economist and Senior Vice President, Research, National Association of REALTORS®
- Shaun Cathcart, Director and Senior Economist, Canadian Real Estate Association

9:30am – 11:00am: Closing Comments & Keynote Speaker:

Speaker:

- Amanda Gore

Description:

The 2024 Joint AE Institute will wrap up with some closing thoughts, followed by an engaging and motivating closing keynote address by Amanda Gore, a top emotional intelligence keynote speaker and best-selling author. Amanda uses the principles of emotional intelligence to transform the spirit of people and cultures by changing perceptions, improving relationships, connecting people, managing change, leadership, innovation, and team dynamics.

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