

**2018 C.A.R. AE/GAD Institute
Pasea Hotel and Spa
Huntington Beach, CA
June 21 – 23, 2018**

Day 1, June 21

12:00 – 1:00

Registration Open - *Sapphire Foyer*

1:00 – 1:30

Opening Session – *Sapphire Ballroom 2/3*

Steve White, 2018 C.A.R. President

Andrew Cooper, CEO, Arcadia Association of REALTORS®

1:30 – 2:30

Opening Session - *Sapphire Ballroom 2/3*

Creating a “Yes, And” Culture of High-Level Performance & Engagement

Galen Emanuele, International Speaker, Shift Yes, LLC

Galen’s dynamic keynote presentation teaches leaders and organizations how to apply the improv concept of “Yes, and” to radically improve communication, team performance, and engagement. Through thought-provoking activities aimed at enhancing leadership and building cohesive team culture, attendees come away with tools to skyrocket leadership and communication within their organizations. Participants laugh and learn together while gaining actionable skills that will permanently change the way they show up and lead their teams in business.

Sponsored by CRMLS

2:30 – 2:45

Afternoon Break - *Sapphire Foyer*

2:45 – 3:45

Breakout Session I

Questioning the Orthodox Beliefs of Association Governing – *Emerald Cove*

Jeff De Cagna, Executive Advisor, Foresight First, LLC

In a time of relentless societal transformation, it is crucial for association boards of directors to strive for the highest possible level of performance. Unfortunately, governing's most orthodox beliefs--the deep-seated, sacrosanct and rarely questioned assumptions about how boards are supposed to operate--may be preventing senior association decision-makers from taking their work to the next level and making it more difficult for their organizations to thrive. Now is the time to examine these orthodox beliefs more closely and consider whether they are advancing the work of governing, or, holding it back. This session will provide participants with a safe space in which to think beyond today's governing orthodoxies and consider how next practices of governing can strengthen board performance.

Breakout Session II

Snap! Making the Most of First Impressions, Body Language & Charisma – *Sapphire Ballroom 1*

Patti Wood, Speaker, Trainer, Spokesperson & Media Authority, Communication Dynamics. Inc.
You meet someone and, on average, within 10 seconds, you decide whether you like them. How is that first impression formed? Is your gut reaction accurate? In this high energy and interactive program, you will learn to read the thousands of nonverbal cues hidden in the hello and the handshake that can make your interactions more genuine and more productive.

4:00 – 5:00

Breakout Session I

“Effectively Navigating Conflict & Delivering a “No” Using the Tools of “Yes, And” - *Sapphire Ballroom 1*

Galen Emanuele, International Speaker, Shift Yes, LLC

One of the biggest challenges that we face as leaders and humans is how to effectively deliver a 'no' and navigate conflict. These are amplified in a business setting where taking the wrong approach can destroy engagement, morale, creativity, and impact your personal reputation. In this session, Galen will teach you how to successfully navigate the art of delivering a 'no' and navigating conflict; providing you with a concise set of tools and guidelines. Learn how to take a collaborative, strategic approach that feels authentic and supportive without crushing employee and team morale.

Breakout Session II

Succession Planning: Assuring a Continuity of Leadership for Your Association – Emerald Cove

Jeffrey Wilcox, President & CEO, Third Sector Company, LLC

The future of any organization rests on its abilities to assure there is a continuity of leadership in place to advance its mission. Succession planning is one of the most misunderstood concepts in association management today; believing its only about people in the office or in the boardroom leaving, rather than a deliberate commitment to attracting, growing, and keeping talent while always being prepared for their inevitable transitions. During this learning lab, participants will complete a self-assessment about their succession culture, receive tools for handling an unexpected break in leadership, review the essential elements of a succession plan, and how to incorporate succession planning into performance review, policy development, and strategic planning processes.

Breakout Session III

Mining NAR’s Campaign Services Resources & NAR Federal Political Advocacy - Two Harbors A

John Winston, NAR Campaign Services Manager

Christopher Gosselin, NAR Senior Political Representative

Learn how to maximize the resources available from NAR to help your association successfully execute independent expenditure, ballot measure, and issue advocacy campaigns. Get insights into the federal candidate screening process, how RPAC supports REALTOR® champions at the federal level, and how local associations can get involved.

5:30 – 7:00

Welcome Reception - The Blue Room

Sponsored by Zillow

Day 2, June 22

7:30 – 8:30

Continental Breakfast - Sapphire Foyer

8:30 – 9:30

General Session

Industry Disruptors: Friend or Foe - Sapphire Ballroom 2/3

Sara Sutachan, C.A.R. Vice President of Industry Relations & Strategic Initiatives

In this session, C.A.R.'s Sara Sutachan will have a conversation with representatives from 3 firms that embody what we think of as disruptors: firms that change the traditional way an industry operates. Redfin (salaried agents), Purple Bricks (flat fee) and eXp Realty (agent-owned cloud-based brokerage) are three companies that are doing things differently in the real estate brokerage space. What do they see that the traditional models don't? How do they see their potential for growth? What agents are most successful in their model? What can we learn from them? Let's find out.

9:45 – 10:30

Breakout Session I

Redefining Member Engagement and Experiences - Sapphire Ballroom 1

Nobu Hata, Director of Member Engagement, National Association of REALTORS®

Connecting association offerings to what your members really want and need is key to engagement online and actionable experiences offline for you and them. Learn what your members really mean when they tell you what they want, how to deliver what they need in social media and other messaging channels to earn mindshare and how to effectively engage with them once there.

Breakout Session II

Managing the Politics of Your Association:

Essential Elements of Politically Savvy Leadership to Advance a Mission - Emerald Cove

Jeffrey Wilcox, President & CEO, Third Sector Company, LLC

How positions of power choose to manage the political situations that arise within their organization can make the difference between success or failure in any leadership career. In this fast-paced overview, participants will discuss the attributes of the politically-savvy leader, how political situations develop within organizations, and the three most common types of political behavior. Participants will be given two tools to use as a resource in helping to create a positive political climate in their organizations and advance their careers as politically-astute leaders.

Breakout Session III

Using NAR's NEW Advocacy Everywhere Call-for-Action Platform - Two Harbors A

Melissa Horn, Online Advocacy Manager, National Association of REALTORS®

What's the Legislative Issue? Why do REALTORS® Care? When is the vote? Who do we need to mobilize? And, most importantly, HOW are we going to get them to click, call and post to take action on our time-sensitive advocacy campaign?! Deep breaths! Archive serenity by reducing your Association advocacy stress level by learning about NAR's NEW Advocacy Everywhere call-for-action platform to quickly engage your members on legislative campaigns through email, phone calls, social media and more! To showcase these new tools, this session will review a snapshot campaign on what you could do to drive REALTOR® actions on a short-term rental call-for-action campaign.

10:45 – 11:30

Breakout Session I

FBI Tells About Cybersecurity: How it's Hitting the Real Estate Industry and What You Can Do About it – Sapphire Ballroom 1

Michael Sohn, Supervisory Special Agent, Federal Bureau of Investigation

Phishing, ransomware, malware, social engineering – oh my! The process of keeping up with new technologies, security trends and threat intelligence is an overwhelming task. But it's necessary in order to protect your association's information and other assets from cyberthreats that can take many forms. This session will give you a unique look at the effects of cyber and the impact it can have on your association. Understand how hackers rely on social engineering – the non-technical intrusion that relies heavily on human interaction and tricking people - to break normal security procedures and what you can do to prevent and mitigate attacks. Learn how to protect yourself and your association in this highly informative and eye-opening session.

Breakout Session II

But wait, there's more...zipForm®, Education & Legal Tools - Two Harbors A

Laura Miraglio, REBS Education Services Director

Julie Jaross, REBS REALTOR® Training and Business Services Manager

It's about more than products and services for members. In this session, you'll learn how to create value at your Association with zipForm® Plus training opportunities and tools; the variety of learning programs offered by C.A.R. Education that help your members grow while you earn non-dues revenue; and how C.A.R.'s Legal Tools will keep you and your members out of trouble and in-the-know, offering a wide variety of legal subjects in an engaging format. Don't miss this opportunity to be your members' primary resource for everything they need to gain a competitive edge.

Breakout Session III

State Legislative and Political Update: Key State Legislative Issues & Statewide Candidate Campaigns Affecting REALTORS® and Housing in 2018 – Emerald Cove

Alex Creel, C.A.R. Senior Vice President and Chief Lobbyist

Laiza Negrete, C.A.R. PAC Director

Politics are never dull in California. 2018 and 2019 will be no exception. In the upcoming legislative session, the State Legislature will consider numerous bills that will impact our industry. Meanwhile, votes will go to the polls this November and cast their ballots for statewide office and on a several ballot initiatives. Creel and Negrete will discuss these issues and the impact they will have on local association advocacy programs.

11:45 – 1:00

IMPAC Lunch - Sapphire Ballroom 2/3

Speaker: Michael Ramirez, America's Premier Editorial Cartoonist, Two-time Pulitzer Prize Winner

Sponsored by IMPAC

1:15 – 2:15

Breakout Session I

Reconnecting with Your Purpose and Choosing to Lead in a Changing World – Emerald Cove

Sara Thompson, Ph.D., Executive Coach and Leadership Consultant

Leading change in today's society is challenging. This interactive session will help you as a leader understand why change is hard for organization's members and constituents. You will reflect on your purpose and discuss any limiting beliefs that are getting in the way of you being at your best. Simultaneously, you will hone your listening skills by learning perception checking -- one of the most valuable tools for a leader and one that is most often overlooked. Leave the session with renewed insights into your purpose and a new skill to use when connecting with your members.

Breakout Session II

MLS CEO Panel: Making Sense of It All - Sapphire Ballroom 1

Moderated by Denee Evans, CEO, Council of Multiple Listing Services

Art Carter, CEO, California Regional MLS

Annie Ives, CEO, The MLS/CLAW

Rebecca Jensen, CEO, Midwest Real Estate Data

Curious how the future of the MLS will affect your AOR and members? Want behind the scenes information from top MLS minds? Need help making sense of it all? This high-powered panel of top MLS CEO's will challenge each other as well as your conventional thinking of what an MLS is and what it should be. This promises to be a no-holds-barred session you won't want to miss!

Breakout Session III

Californians for Housing: C.A.R.'s New Legal Foundation - Two Harbors A

June Barlow, C.A.R. Senior Vice President and General Counsel

Californians for Homeownership, C.A.R.'s newly formed nonprofit legal foundation, will proactively bring lawsuits to help the affordable housing supply and ownership issues through the courts. Learn how this foundation can augment local governmental advocacy and pro-supply housing priorities. The foundation has hired an in-house litigator to champion the cause and hold local cities, counties and other entities accountable when they get in the way of, instead of supporting, housing that is in such dire need. This interactive session will include many opportunities to give input and share local issues that may be ripe for this approach.

2:30 – 3:30

Breakout Session I

Hot Employment Law Issues – Sapphire Ballroom 1

Richard J. Simmons, Partner in the law firm of Sheppard, Mullin, Richter & Hampton LLP

In the past 12 months, the California Supreme Court has issued landmark decisions on overtime, bonuses, independent contractors, the Labor Code, the day-of-rest rules and other topics while placing more wage-hour cases in the queue for decision. The California Legislature has passed new rules relating to the use of prior salaries, pay equity and the ability to seek information about criminal convictions, even as the state and federal governments battle over an employer's role in immigration law enforcement. In California we wake up each morning knowing everything could change. This one-hour session will survey the new terrain resulting from developments on the judicial, regulatory and legislative fronts.

Breakout Session II

RPR® Resources: Game Changing Tools for GADs and AEs - Emerald Cove

Karen France, Senior Vice President, Realtors® Property Resource, LLC

Up your game and learn how RPR's Dashboard equips AEs and GADs with Advocacy tools to be *The Voice for Real Estate*® and meet Core Standards requirements through key features including Market Data and Economic Area Reports. We'll show you the unique ways AEs and GADs are using this exclusive member benefit to get a seat at the table for economic development activities in their communities. Learn how to leverage the RPR tools designed just for AEs and GADs and act as the trusted source of real estate information in your marketplace.

3:30 – 4:00

Afternoon Break - Sapphire Foyer

4:00 – 5:00

Breakout Session I

Reducing Legal Risks for Employment Law Decisions - Sapphire Ballroom 1

Richard J. Simmons, Partner in the law firm of Sheppard, Mullin, Richter & Hampton LLP

Trending cases and legislation reveal an anticipated uptick in class action lawsuits, wage-hour litigation, harassment claims, personnel policy challenges, discrimination and wrongful discharge cases. The plaintiff's bar has increased its mass to prey upon unprepared and uninformed employers. This session will identify recurring areas of legal risks and exposure, challenges that employers face, and selected compliance strategies designed to mitigate and avoid risk.

Breakout Session II

Lessons in Leadership: From the Situation Room to the Board Room - Emerald Cove

Sean "Metro" Fellows, Senior VP of Operations & Public Affairs, National Security Technology Accelerator (NSTXL)

Major Sean Fellows has over 15 years of executive experience working in the Federal Government. Sean was even fortunate to be personally mentored by two former Presidents of the United States on leadership. From the halls of the Pentagon and across the Potomac River to the halls of the White House, he will share firsthand accounts of lessons in leadership. In this conversation, Sean will not only share stories of success, but those of failure to help others learn from the examples set by some of our nation's most pivotal leaders.

Dinner at Leisure

Day 3, June 23

7:30 – 8:30

Buffet Breakfast - Sapphire Ballroom 1

8:45 – 9:45

General Session - Sapphire Ballroom 2/3

State of the Association

Joel Singer, CEO, California Association of REALTORS®

9:45 – 10:00

Mid-morning Break - Sapphire Foyer

10:00 – 11:00

Closing Keynote: What Members Really Want - Sapphire Ballroom 2/3

Leigh Thomas Brown, Real Estate/Personality/Speaker, Leigh Brown Instruction

Why do some associations grow while others remain stagnant? Why do some associations have flourishing committees, new leadership and excitement, while others get stuck and seem to 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.

Sponsored by The Benefit Store

11:00 – 11:30

Closing Remarks and Drawing - Sapphire Ballroom 2/3