

Welcome to the...

Association Executives Forum

Duncan MacKenzie, RCE, Chair
Albany, NY

John Sebree, RCE, CIPS, Vice Chair
Columbia, MO

Arlene Davis, CRB, CRS, GRI, NAR
Liaison
Vidalia, GA

Bob Goldberg

Chief Executive

NATIONAL ASSOCIATION OF REALTORS®
Officer



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NAR UPDATE

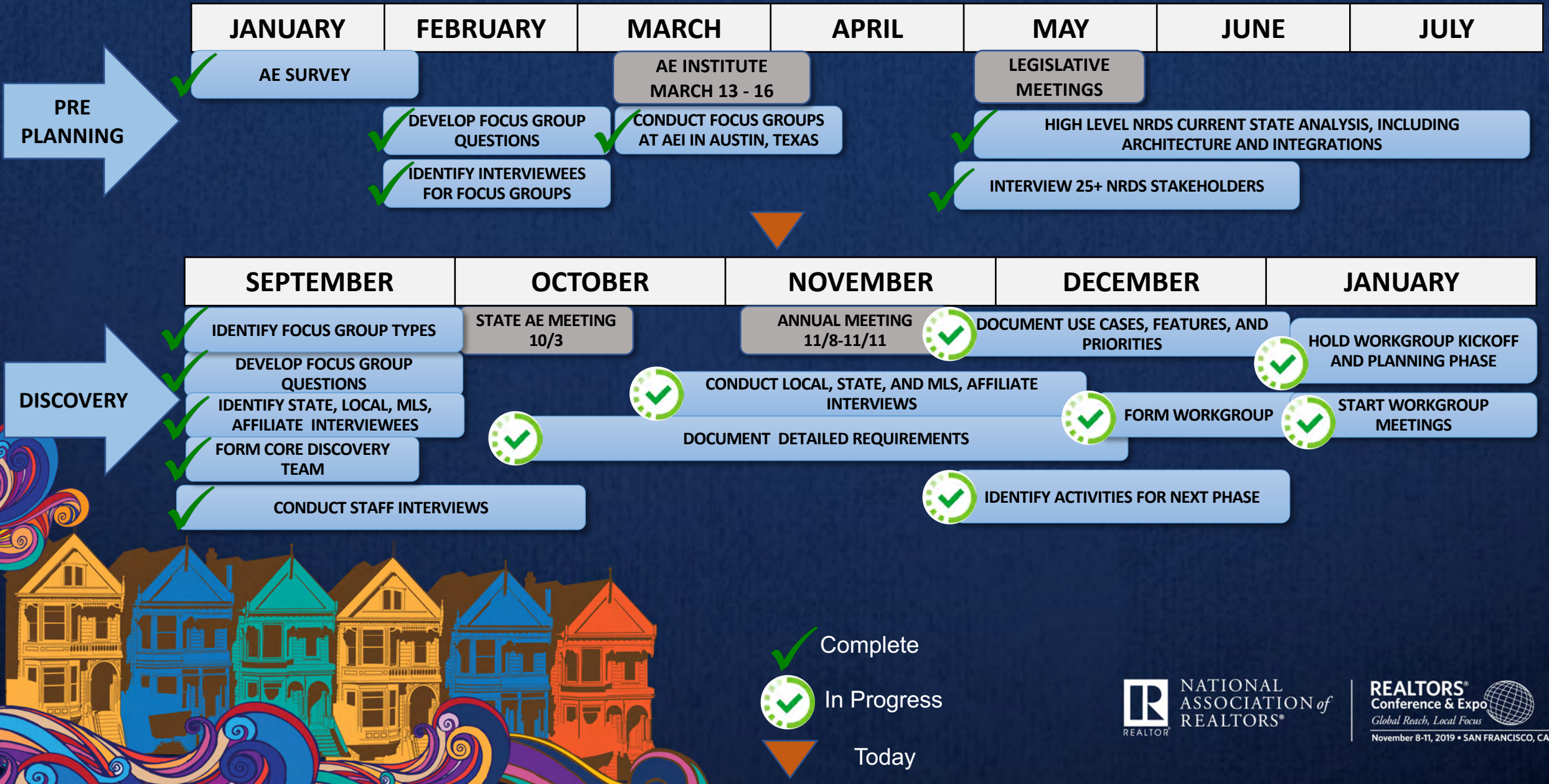
State of Member Facing Systems

- 20 to 25 year old systems
- 300 legacy applications – Domino, Websphere
- Unsupported software – Oracle 10
- Non users friendly unintuitive UI
- Not nimble or easy to change
- Difficult to integrate with
- Minimal reporting and analytics
- Missing a cohesive strategy and roadmap

10^g
ORACLE®
DATABASE



Member Database and Ecommerce Re-Platform Discovery Timeline For 2019



Project Communication

Working closely with NAR Communication team we have:

- Met with state AE's at Washington DC and Chicago
- Introduced the project to the AE community via the hub and asked for feedback
- Initiated an email campaign sending 1100 emails on October 15 and follow up on October 22nd
- Carried out interviews with state and local AE's since October 16
- 30 interviews carried out so far. At annual we have 6 sessions and will meet 19 associations
- We have received close to 400 requirements so far.
- We request and urge associations to provide further feedback on feedbacknrds@realtors.org

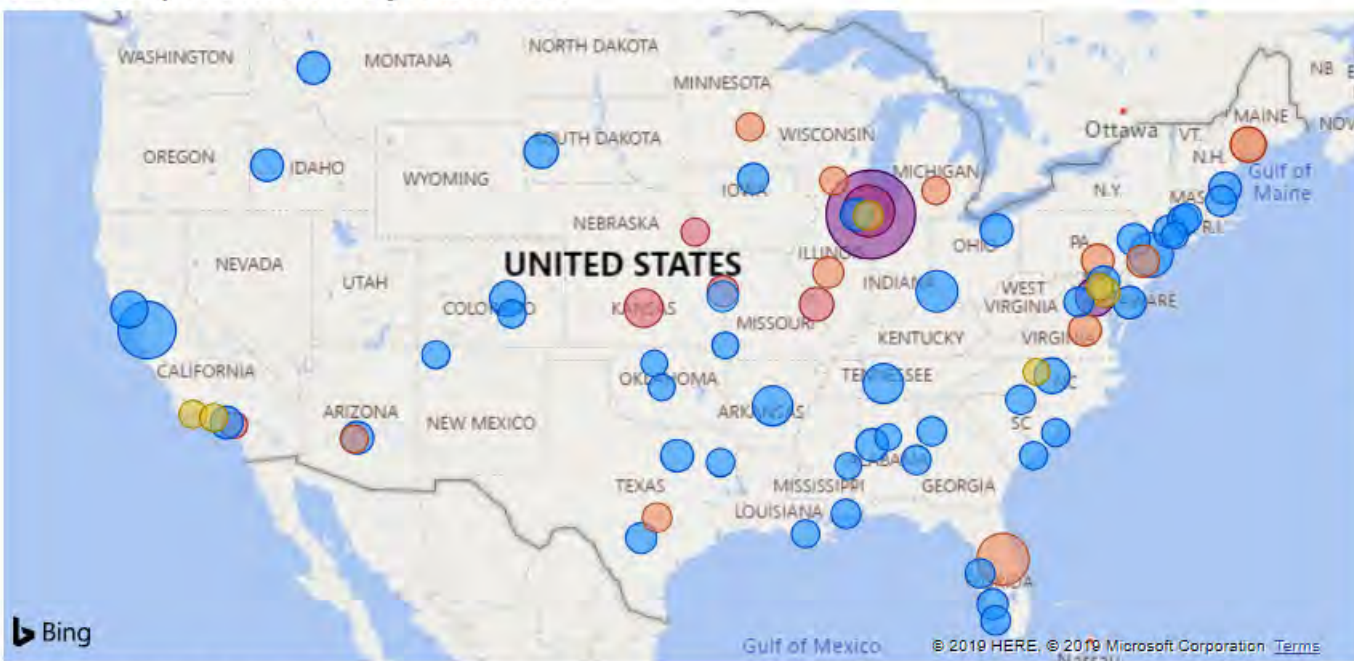


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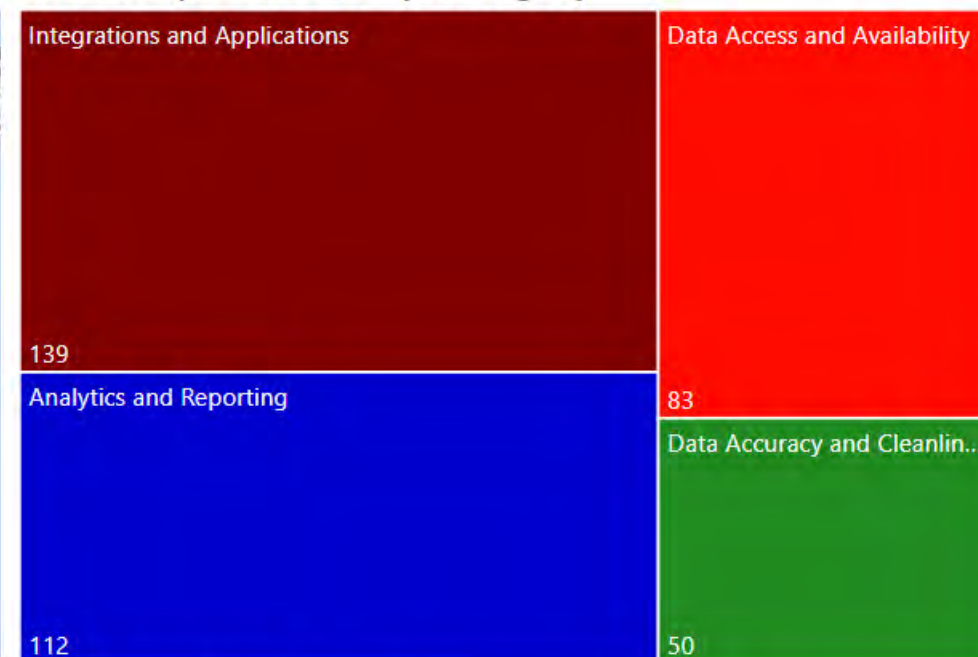
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2019 NRDS & RECN Requirements

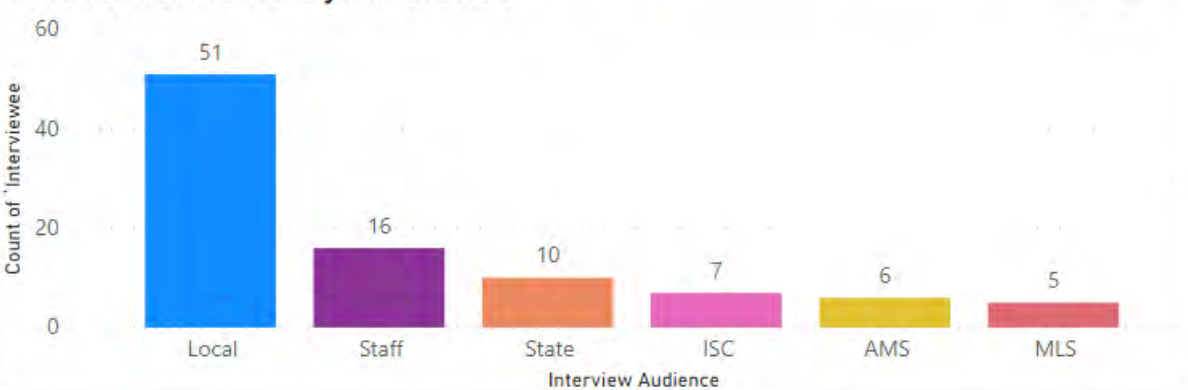
Total Requirements by Location



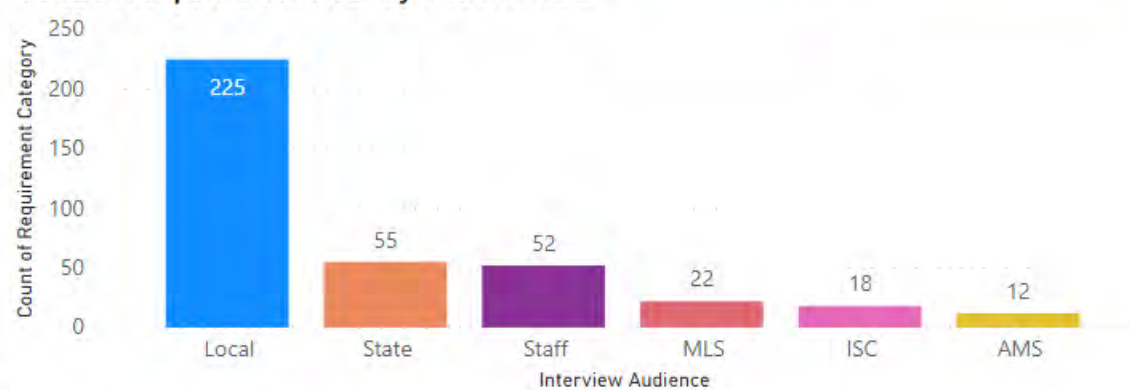
Total Requirements by Category



Total Interviews by Audience



Total Requirements by Audience



Number of requirements and audience members are based on duration between September and October 2019
 Additional requirements being gathered till January 2020 through interviews, current system, and emails being collected from state and local AE's

Requirement Themes

DATA QUALITY

Improve member PII addresses, up to 45% addresses incorrect
Improve tracking and sharing of historical member data
Better secondary data-multiple license numbers, tracking, education, affiliations
Additional data – demographics, designations, committees

USER EXPERIENCE

Modern UI aesthetics
Improved user experience paying dues via AMS and NAR.Connect
Response and adaptive UI
Ease of access to data with user friendly interfaces

ANALYTICS

Data to compare associations with others in nearby regions
Data on member activity and volunteerism
Member counts and aggregated totals
Ability to search for and segment member data

INTEGRATIONS

Allow real-time updates with more modern integration techniques
Better error codes for integration failures
Better integrations with 3rd party data vendors Targetsmart, Acxiom, Aristotle



TRANSFORM AND MODERNIZE



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FUTURE MEMBER DATA



ONE SOURCE OF TRUTH

- Improved data reputation and one source of truth
- 3rd party data providers for accuracy checks

MASTER MEMBER RECORD

- Too many parties can alter master member record
 - Define rules for rights to change record
- Define approach for Active / Passive member data

EXPANDED RECORD

- Only 11 fields require BOD approval for change
- Other fields can be expanded to bolster member record

MODERN DATA INGRESS

- Introduce API Gateways and RESTful techniques
- Re-look at current queuing approach

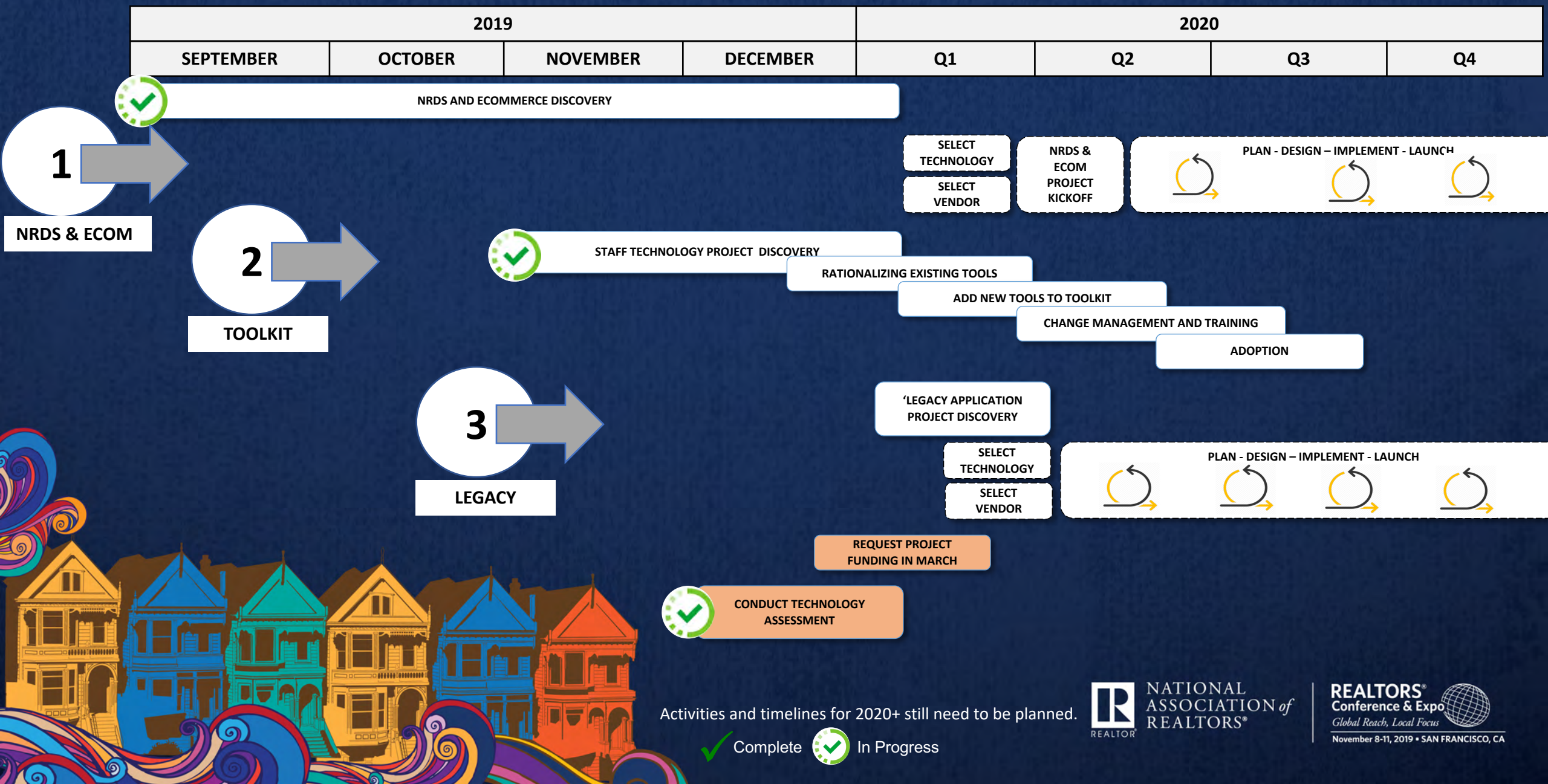


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Transformation High Level Timeline 2019 - 2020



IMAGINE
THE POSSIBILITIES

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AE Recognition



Congratulations 2019 Retiring AEs

***Jim Abele, RCE
Chief Executive
Officer
Cincinnati Area
Board, OH***



Congratulations 2019 Retiring AEs

***Stan Collins, RCE
Chief Executive Officer
Columbus Association and
Columbus & Central Ohio
Regional MLS***



Congratulations 2019 Retiring AEs

Dallas Hancock, RCE
***Chief Executive Officer
Peoria Area Association, IL***



Congratulations 2019 Retiring AEs

***Linda Jay, RCE
Chief Executive Officer
Bakersfield Association,
CA***

Congratulations 2019 Retiring AEs

**Meg Manning,
RCE**

***Executive Director
REALTOR® Association of
Southern Kentucky***





Congratulations 2019 Retiring AEs

***Connie Legris, RCE
Association Executive
Kankakee-Iroquois-Ford
Association, IL***



Congratulations 2019 Retiring AEs

**Melva
Derrickson**
***Association Executive
North Central Board,
AR***



Congratulations 2019 Retiring AEs

Kevin King

***Executive Vice President
REALTORS® Association of
South Central Wisconsin and
South Central Wisconsin MLS***

Congratulations **2019 Retiring AEs**

Congratulations **Fall 2019** **RCE Designees**

Fall 2019 RCE Designees

Linda Arcouette, RCE, Kent Washington Association, RI
Chrissy Campbell, RCE, Georgia Association
Jennifer Farrar, RCE, Tennessee Association
Gilbert Gonzalez, RCE, San Antonio Board, TX

Fall 2019 RCE Designees

—

Barbara Hamilton, RCE, Central Susquehanna Valley Board, PA
Claire Hayden, RCE, Charleston Trident Association, SC
Carrie Holt, RCE, Southwest Virginia Association
Heather Horlor, RCE, Greater Portland Board, OR

Fall 2019 RCE Designees

—
Jamie Johnson, RCE, Park City Board, UT

David Jones, RCE, Texas Association

Nancy Lawson, RCE, Mountains to Shore Board, ME

Nita Martin, RCE, San Antonio Board, TX

Fall 2019 RCE Designees

PJ Monella, RCE, Greater Erie Board, PA

Nicole Murray, RCE, Pocono Mountains Association, PA

Nancy Myers, RCE, Greater Denton Wise County Association, TX

Taylor Oldroyd, RCE, Corpus Christi Association, TX

Fall 2019 RCE Designees

Sarah Rayne, RCE, Coastal Association, MD

Valerie Regan, RCE, Shoals Area Association, AL

Scott Reiter, RCE, District of Columbia Association

Stephanie Rief, RCE, Selkirk Association, ID

Fall 2019 RCE Designees

Amy Robey, RCE, Mainstreet Organization, IL

Mary Shileny, RCE, Northeast Iowa Regional Board

Sarah Thorsteinson, RCE, Summit Association, CO

Reginia Tuttle, RCE, River Counties Association, TN

William D. North AE Institute Scholarship

2020 William D. North AE Institute Scholarship Award Recipients

Susan Cenotti, Lassen Association, CA

Mot Davis, Cleveland County Association, NC

Katie Hunziker, Southern Gateway Association, MO

Tanya Keck, Badlands Board, ND

Julie Larson, Youngstown Columbiana Association, OH

Congratulations

2020 William D. North AE Institute Scholarship Award Recipients

Jean Richardson, Pulaski County Board, MO

Terry Stevens, Rocky Mount Area Association, NC

Denise Taylor, Elko County Board, NV

Bonnie White, Johnston County Association, NC

Shawna Whorton, Newton McDonald Counties Board,
MO

Congratulations

Judith Lindeneau RCE Scholarship

2019 Judith Lindeneau RCE Scholarship Recipient

Julie Larson, Youngstown Columbiana Association,
OH

Carla Rose, Salisbury/Rowan Association, NC

Tammy Stewart, St. Clair Association, AL

Congratulations

Association Executives Forum

AE Leaders of Tomorrow Young Professionals Award

**2019 AE Leaders of Tomorrow
Young Professionals Award
Recipient**

**Andrew Sims, RCE
Raleigh Regional Association, NC**

Congratulations

50/50 AE RPAC Challenge

50/50 AE RPAC CHALLENGE

Lisa Abbott, EVP, Bloomington Board, IN

Lisia Amburn, RCE, CEO, Lakeway Area Association, TN

Lynda Anthony, CEO, Florida Keys Board

Brendan Bailey, RCE, CEO, REALTOR® Association of Pioneer Valley®, MA

Ana Becerra, AE, Harlingen Board, TX

Carrie Chang, CEO, Minneapolis Area REALTORS®, MN

Dianne Clark, CEO, Englewood Area Board, FL

Tiffany Claxton, RCE, CEO, KITSAP County Association, WA

Amanda Creel, RCE, CEO, Prescott Area Association, AZ

Vardell Curtis, RCE, CEO, Washington County Board, UT

50/50 AE RPAC CHALLENGE

Sheila Dodson, RCE, CEO, Baldwin REALTORS®, AL

Amy DuBose, RCE, AE, Bryan-College Station Regional Association, TX

*Angela Emerson, RCE, Professional Development Director, Pinellas
REALTOR®*

Organization, FL

Pamela Frestedt, CEO, Southeast Valley Regional Association, AZ

Hugh Gordon, AE, Frederick County Association, MD

Gilbert Gonzalez, RCE, San Antonio Board, TX

Michael Graziano, EVP, Prince George's County Association, MD

Lisa Gurske, CEO, Gainesville-Alachua County Association, FL

Ruth Hackney, RCE, CEO, REALTORS® Association of South Central Wisconsin

Greg Hadsell, EVP, Wichita Falls Association, TX

50/50 AE RPAC CHALLENGE

Theresa Hatton, RCE, CEO, Massachusetts Association

David Hensley, CEO, Idaho REALTORS®

Elizabeth Hiett, AE Director, Newnan-Coweta Board, GA

Tessa Hultz, RCE, CEO, Long Island Board, NY

Robert Johnston, RCE, CEO, Anne Arundel County Association, MD

Kimberly King, RCE, EVP, Sedona Verde Valley Association, AZ

Sandy Krueger, CEO, Staten Island Board, NY

Matthew Lafferty, e-PRO®, Member Services & Admin Director, Delaware Association

Justin Landon, RCE, CEO, Lexington-Bluegrass Association, KY

Shay Lawson, RCE, CEO, Tuscaloosa Association, AL

50/50 AE RPAC CHALLENGE

Mary Leidy, RCE, CEO, Collin County Association, TX

Cliff Long, RCE, CEO, Orlando Regional REALTOR® Association

Dennis MacDonald, RCE, CEO, Greater Tampa REALTORS®, FL

Tracey Malooley, RCE, AE, Terre Haute Area Association, IN

Lisa Martin, CEO, Grand Junction Area Association, CO

Josh McFall, RCE, CEO, Hunstville Area Association, AL

Marlene Merkle, CEO, Venice Area Board, FL

Misty Miller, RCE, EO, Ashland Board, OH

Emily Merkley, CEO, Cache Valley Association, UT

Michelle Mills Clement, CEO, Chicago Association, IL

50/50 AE RPAC CHALLENGE

Lindsay Neary, AE, REALTORS® Association of Westmoreland, PA

Roger Nelson, CEO, West Maricopa Association, AZ

Jenny Pakula, RCE, Oregon Association

Linda Pizarro, CEO, Punta Gorda-Port Charlotte-North Port Association, FL

Tom Renkert, CEO, Ann Arbor Area Board, MI

Bill Robinson, CEO, Sanibel and Captiva Islands Assoc of Realtors®, FL

Sharon Sample, RCE, VP, Board Services & Officer Liaison, Ohio REALTORS®

John Savant, GAD, Reading-Berks Association, PA

Amy Scott, Executive Officer, Wayne-Holmes Association, OH

Katie Shotts, RCE, CEO & EVP, Memphis Area Association, TN

Denise Shultz, RCE, CEO, Lakes Area REALTORS®, WI

50/50 AE RPAC CHALLENGE

Evelyn Schultz, RCE, CEO, Conejo Simi Moorpark Association, CA

Sharon Smith, CEO, Quad City Area REALTORS®, IA

William Smith, CEO, New Castle County Board, DE

Wesley Stefanick, RCE, AE, Reading-Berks Association, PA

April Thomas, RCE, CEO, REALTOR® Association of Prince William

Deena Turner, AE, Ruidoso/Lincoln County Association, NM

Mike Valerino, RCE, COO, Akron Cleveland Association of REALTORS®, OH

Jim Yockel, RCE, CEO, Greater Rochester Association, NY

Suzanne Young, CEO, Honolulu Board, HI

Gabe Walsh, Legal Counsel, Iowa REALTORS®

Scott Williams, CEO, Ohio REALTORS®

Lindsay Wright, AE, Greater Texoma Association, TX

Code of Ethics PAG Report

2019 Code of Ethics Presidential Advisory Group

Michael Labout, CIPS CRS CSP e-PRO GRI, Chair,
Colorado

Tracy Huotari, RCE, Vice Chair, California



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RECOMMENDATION #1

Be it resolved that learning objectives for the existing member Code of Ethics training be revised to include content on professional conduct, courtesies, business etiquette, and real-life scenarios.

RECOMMENDATION #2

Be it resolved that NAR establish Code of Ethics training equivalency options that members can take in order to satisfy the Code of Ethics training requirement, and that the Commitment to Excellence (C2EX) endorsement be an equivalency option.

RECOMMENDATION #3

Be it resolved that only courses and equivalencies provided by a local, state or national REALTOR® association can satisfy the Code of Ethics training requirement.

RECOMMENDATION #4

Be it resolved that an implementation team be appointed to develop a microsite that compiles all available options for fulfilling the Code of Ethics training requirement, including C2EX ethics modules, NAR-approved online courses, and links to association-approved courses.

RECOMMENDATION #5

Be it resolved that the Core Standards requirements be amended to clarify associations' duties regarding administration of the Code of Ethics training requirement.

FURTHER ACTION

That Code of Ethics training be required every three years, and that the current two-year cycle be amended to end December 31, 2021

Core Standards for State Associations

Angela Shields, RCE, CAE, Co-Chair,
Tennessee

Maranda DeSanto, RCE, Co-Chair,
Minnesota



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Governance Game Changer PAG Update

Terrie Suit, CAE, Vice Chair,
Virginia



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AEC Representative Reports

Open Discussion

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