



Sample

NAR Organizational Alignment - Core Standards Certification Form

Association ID: 0001

Association Name: National Association of Realtors

President: Sample President

President Elect: Sample President Elect

Executive Officer: Sample Association Executive

430 N. Michigan Ave

Chicago, ILL 60611

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Please save your data as you complete this form. If you lose connectivity, you will lose your work.

Mandatory Core Standards for Association of REALTORS®

Note: State Associations may, at their discretion, request additional documentation from local associations to confirm compliance with the Mandatory Core Standards for Associations of REALTORS®

Save and Return Later --Of-- Submit Core Standards Certification form

Section I - CODE OF ETHICS

A. Core Standard: Every association will enforce the new and continuing member Code of Ethics training requirement established in Article IV of the NAR Bylaws.

1. Does the association track member compliance with the requirement of 2.5 hours of training on the REALTOR® Code of Ethics for new and existing members.

Yes No

B. Core Standard: Every association will maintain a viable professional standards process to enforce the Code of Ethics and provide arbitration and mediation as member services.

Associations must have a fully functioning professional standards committee with administrative capability to conduct the program, or must administer professional standards enforcement through a multi-board (or regional) professional standards agreement with other associations or with the state association.

2. Does the association have a professional standards committee?

Yes No

3. Does the association participate in a multi-board (or regional) professional standards agreement with other associations or with the state association?

Yes No

If yes, list the names of the other participating associations

C. Core Standard: Every association will link its website to the Code of Ethics/professional standards resources available online by the NAR and the state association. These materials will be available to members and to consumers at the website.

4. Website URL:

D. Core Standard: Every association will provide mediation services to members as required by Article IV of the NAR Bylaws. Associations may also offer ombudsman services to members and their clients and customers and, if available in the state, may implement a "citation" enforcement policy.

5. Does the association provide mediation as a member service?

Yes No

If yes, Please list the name(s) of the association's mediators

6. Does the association offer ombudsman services?

Yes No

If yes, Please list the name(s) of the association's ombudspersons

7. Does the association utilize a "citation system" of discipline?

Yes No

Section II - ADVOCACY

A. Core Standard:

8. Unless prohibited by state law and in recognition of state law differences, each association will include in their dues billing a voluntary investment for RPAC in an amount adequate to meet the NAR RPAC established goal. Please upload a sample dues billing statement. (Note: If you checked either of the first two boxes, proceed to #11)

RPAC Dues Billing "above the line" (strongly recommended)

RPAC Dues Billing "below the line"

N/A

[Attach Document](#)

9. Associations may instead include in their dues billing a voluntary investment for the Political Advocacy Fund (PAF) in an amount adequate to meet the NAR RPAC established goal. Please upload a sample dues billing statement. (Note: If you checked either of the first two boxes, proceed to #11)

PAF Dues Billing "above the line"

PAF Dues Billing "below the line"

N/A

[Attach Document](#)

10. Alternatively, the association can meet the NAR RPAC established goal by other legal means, if preferred (i.e., making a corporate investment for the full amount of the NAR established RPAC goal).

The association did not include an RPAC contribution option for members in its dues billing but instead met this requirement by (check one):

Corporate contribution in the full amount of the NAR established goal

PAC to PAC transfer in the full amount of the NAR established goal

N/A

Note: Funds are to be sent to RPAC or the PAF (individually or collectively by/through the State Association). The intent of this Standard is to provide the best opportunity for every association to meet its goal.

B. Core Standard: Each association will provide or distribute information and communications from NAR and the applicable state association, regarding the value of investing in and the benefits received from the individual's participation in RPAC at all three levels (local, state and national) of the organization.

11. The association met the above requirement by educating and communicating with members about RPAC.

Yes

No

If yes, please identify the method(s) used to communicate with your membership about RPAC. Please check each that applies:

RPAC Brochures/flyers

Newsletter (online or print)

RPAC on Website

RPAC Email Campaigns

RPAC presentations at membership meetings

RPAC presentations at office meetings

Other digital materials

Other print materials

C. Core Standard: Every association will demonstrate significant participation in NAR Calls for Action delivered through the REALTOR® Action Center.

12. Please check the methods used to acquire significant participation and upload at least one example:

- Promoted on Association Website
 Promoted in Association newsletter
 Promoted by separate email
 Promoted using social media (Facebook, Twitter, etc.)
 Other digital materials
 Other printed materials

Attach Document

(Note: State associations will monitor local association participation through the REALTOR® Action Center Response Reports <http://www.realtoractioncenter.com/for-associations/cfa-report/>.)

D. Core Standard: Every association will demonstrate significant participation (if applicable) in State Calls for Action delivered through the REALTOR® Party Hub or other program for the distribution of Calls For Action.

13. Please check the methods used to generate significant participation and upload an example of at least one method utilized:

- Promoted on Association Website
 Promoted in Association newsletter
 Promoted by separate email
 Promoted using social media (Facebook, Twitter, etc.)
 Other digital materials
 Other printed materials

Attach Document

(Note: State associations will determine the methods used to monitor participation.)

E. Core Standard: Every association shall demonstrate advocacy engagement.

14. Please attach examples demonstrating REALTOR® Political Party initiatives implemented by the association such as:

- Conducted Candidate Independent Expenditure Races
 Requested and used Candidate Polling & Research
 Hosted a Candidate Training Academy
 Submitted comments or had members testify on proposed real estate related legislation or regulation
 Issues Mobilization Program
 Issues Polling & Research
 REALTOR® Party Hub for Call for Action or other Advocacy Engagement
 Broker Involvement Program
 Polling & Research (members)
 Voter Registration Initiative (members)
 Advocating for public policy in other ways (please upload an example)
 Other (please upload materials)

(Note: Associations can verify activity, get ideas from other associations, and find information about REALTOR Party programs by visiting the REALTOR Party Tracker at <http://www.realtoractioncenter.com/realtor-party/tracker/>)

(Note: You can attach multiple files, one at a time)

Attach Document

Section III - CONSUMER OUTREACH

A. Core Standard: Every association will engage in not less than four meaningful consumer engagement activities annually, reflected by:

(i) Being the "Voice for Real Estate" - promoting market statistics and/or real estate trends and issues (e.g., release through press releases, interviews, etc. of MLS statistics, local market statistics, NAR research reports, local/state analysis of NAR statistics, etc.);

(ii) Community involvement - promoting the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®;

(iii) Advocacy efforts - engaging the public in legislative/political issues that impact real estate and related issues; and

(iv) Community investment – Organizing human resources (i.e., assisting in a Habitat for Humanity build, etc.) or fundraising for the benefit of charitable/community organizations.

(Note: To meet this requirement, every association must conduct four(4) activities with a minimum of one activity in 3 of the 4 categories shown immediately above.

For example, an association could meet the requirement by conducting one "Voice for Real Estate Activity", one "Community involvement" activity, one "Advocacy effort" activity, and one "Community involvement" activity from the suggested activities that follow. Or, an association can engage in two (or more) activities in the same category provided that activities are also conducted in at least two other categories from the list of four categories shown above.)

(i) Being the "Voice for Real Estate"

15. Check any of the following activities your association has completed:

Highlighted local, state or national real estate data in a news release or direct outreach to local reporters.

Yes No

If yes, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association in connection with real estate market data.

[Attach Document](#)

16. Arranged interviews with association leadership to provide context to local real estate data.

Yes No

If yes, upload a copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association's leadership in connection with real estate market data.

[Attach Document](#)

17. Identified local angles of data from NAR research reports (residential, commercial or global/international) and reach out to local reporters.

Yes No

If yes, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association's leadership in connection with real estate market data.

[Attach Document](#)

18. Used social media (Twitter, LinkedIn and Facebook) to share local real estate data insights, and retweet NAR Economists' Outlook.

Yes No

If yes, upload a screen capture of any related social media exchange.

[Attach Document](#)

19. Conducted deskside briefings with local editors to share insights from the local MLS, commercial information exchange, and association-generated real estate data.

Yes No

If yes, provide a brief summary of briefing attendees (outlet, editor, association representatives), date of meeting and topics discussed.

(ii) Community involvement

20. Check any of the following activities your association participated in or completed, and attach examples of materials demonstrating community involvement.

- Leading with Diversity Workshop
- Expanding Housing Opportunities Class
- Employer-Assisted Housing Class
- Workforce Housing Forums
- Smart Growth for the 21st Century Course
- Other

[Attach Document](#)

Check any of the following activities your association has completed:

21. Ran a TV, radio or print ad from NAR's Consumer Advertising Campaign or the state association's consumer advertising campaign in a local media outlet.

Yes No

If yes, upload a scanned copy or screen capture of the advertising as it ran in the media outlet.

[Attach Document](#)

22. Reached out to reporters to suggest stories that demonstrate members' value to home buyers and sellers.

Yes No

If yes, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article

or news segment that mentions your association or association spokesperson in connection with a story about Realtor® value to home buyers and sellers.

Attach Document

23. Reached out to reporters to suggest stories that demonstrate members' value to small business owners, retailers and other commercial businesses.

Yes No

If yes, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association or association spokesperson in connection with a story about Realtor® value to business owners or commercial investors.

Attach Document

24. Sponsored or participate in job or small business fairs.

Yes No

If yes, upload copies of the promotional materials for the job or small business fair that include mentions of your association.

Attach Document

25. Sponsored homeownership fairs.

Yes No

If yes, upload copies of the promotional materials for the homeownership fair that include mentions of your association.

Attach Document

26. Sponsored a tour of vacant commercial property.

Yes No

If yes, upload copies of the promotional materials for the tour that include mentions of your association.

Attach Document

27. Sponsored a seminar on how to invest in commercial property.

Yes No

If yes, upload copies of the promotional materials for the seminar that include mentions of your association.

Attach Document

28. Promoted a local open-house weekend.

Yes No

If yes, upload copies of the promotional materials for the open-house weekend that include mentions of your association

Attach Document

29. Provided materials that help members reach out to consumers directly.

Yes No

If yes, upload samples of these materials and explain below how these materials were made available to members, including postings on Social Media sites or by email.

Attach Document

30. Reached out to Consumers and Homeowners and tell them what your association has accomplished in public policy issues of concern to them.

Yes No

If yes, provide materials (ie: a press story, a Tweet or Facebook posting, a summary of the legislation or regulation, etc.) that demonstrates that your association accomplished and attained a specific result in the public policy area of interest to consumers.

Attach Document

31. Provided materials that help members reach out to businesses directly.

Yes No

If yes, upload samples of these materials and explain below how these materials were made available to members.

Attach Document

(iii) Advocacy efforts

32. Check any of the following activities your association participated in or completed, and attach examples of materials demonstrating advocacy engagement.

- Utilized the Land Use Initiative
- Conducted a poll using the State & Local Growth Polling Program
- Distributing On Common Ground Magazine to public officials
- Candidate Independent Expenditure Races
- Candidate Polling & Research
- Candidate Training Academy
- Issues Mobilization Program
- Issue Polling & Research
- Other (please upload materials)

Attach Document

33. Submitted an op-ed or letter to the editor of the local newspaper addressing the issue at hand.

- Yes No

If yes, upload a copy of the op-ed or letter to the editor, or a copy of the placement itself.

Attach Document

34. Conducted a town hall meeting to address the relevant local issues.

- Yes No

If yes, upload a copy of the promotional materials for the town hall meeting or media coverage of the meeting.

Attach Document

35. Mobilized members to ask their clients and customers to contact their local representative about the issue.

- Yes No

If yes, upload a copy of the materials and/or communications you provided to members for this purpose, and explain below how you distributed this information to REALTORS®.

Attach Document

(iv) Community investment

36. Check any of the following activities your association participated in or completed, and attach examples of materials demonstrating community investment.

- Diversity Initiative Grants
- Housing Opportunity Grants
- Smart Growth Grants
- Placemaking Micro-Grant
- Commercial Innovation Grant
- Global Achievement Award
- Other activity (please upload examples)

Attach Document

37. Participated in a Habitat for Humanity build.

- Yes No

If yes, upload a copy of related member communications, photos or news coverage of association/Realtor® participation in the build.

Attach Document

38. Organized REALTOR® participation in a community fundraising drive or event, such as a local walkathon, donation drive, or volunteering at a homeless shelter.

- Yes No

If yes, upload a copy of related member communications, photos or news coverage of association/REALTOR® participation in the event.

Attach Document

39. Organized a fundraiser activity such as a golf tournament, with proceeds benefitting a community organization.

Yes No

If yes, upload a copy of related member communications, photos or news coverage of association/Realtor® participation in the event. (Note: You can attach multiple files, one at a time)

Attach Document

Section IV - UNIFICATION EFFORTS AND SUPPORT FOR THE REALTOR® ORGANIZATION

A. Core Standard: Every association's bylaws and MLS bylaws (if incorporated) and MLS rules and regulations must be reviewed and approved by NAR at least every two (2) years.

40. Date of Last Approval by NAR:

B. Core Standard: Every association will maintain, have access to or will have legal counsel available.

41. Name and Contact Information for Association Legal Counsel:

C. Core Standard: Every association's policies and procedures shall conform to local, state and federal laws, including the filing of necessary reports and documents (e.g., corporate documents, state and federal tax returns, etc.).

42. Date of last filing of state and federal tax returns or other required forms:

43. Date of last filing of any corporate documents required by state law:

D. Core Standard: Every association shall have a business or strategic plan, including an advocacy component and a consumer outreach component.

44. Date of adoption of current strategic plan:

Attach the association's current strategic and/or business plan.

(Note: Strategic plans and business plans will only be available to/viewable by the National Association, and will not be available to or viewable by the state association or other local associations.)

Attach Document

E. Core Standard: Every association's chief paid staff must attend at least six hours of REALTOR® association professional development on an annual basis (i.e., state, regional or national).

45. Program(s) completed and date:

(Note: You can attach multiple files, one at a time)

Attach Document

Section V - TECHNOLOGY

A. Core Standard: Every association must have an interactive website (defined as the ability to move between websites and create active links), post access to professional standards and arbitration filing processes on the website and create a link to the websites of the other levels of the association for promotion of member programs, products and services.

46. Website URL:

B. Core Standard: Every association must utilize an email and/or internet based means for member communication.

(Note: This requirement is met by maintaining an interactive website.)

Section VI - FINANCIAL SOLVENCY

A. Core Standard: Every association must adopt policies to ensure the fiscal integrity of their financial operations. These financial policies might cover topics and

subjects such as:

- fraud awareness and prevention
- budgeting
- dues collection
- financial information disclosure
- officer, member, and staff travel
- investing
- reserve levels
- payment policies
- compliance reporting
- compensation
- revenue recognition
- asset capitalization
- financial reporting
- conflicts of interest
- whistleblower
- document retention

47. Attach a copy of the association's financial policies

[Attach Document](#)

B. Core Standard: Every association must have an annual audit, review or compilation conducted by a CPA. Please refer to the FAQs available on Realtor.org for definitions/explanations.

Note: Only those associations with gross revenue of less than \$50,000 are permitted to meet the Standard using a compilation report. State and national dues and assessment amounts are not considered to be revenue for purposes of this measurement.

48.

- Date of last financial audit/review/compilation:
- Name of the individual or firm conducting the review:
- Year end to which the report relates:
- If an audit, what type of opinion was received:

[Attach Document](#)

Core Standards Certification Form Agreement

I confirm that the Association President, President-Elect and Association Executive of this association have reviewed and approved this application.

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Update History

Nick Fitsalos 03/02/2015 09:39:35 AM

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