

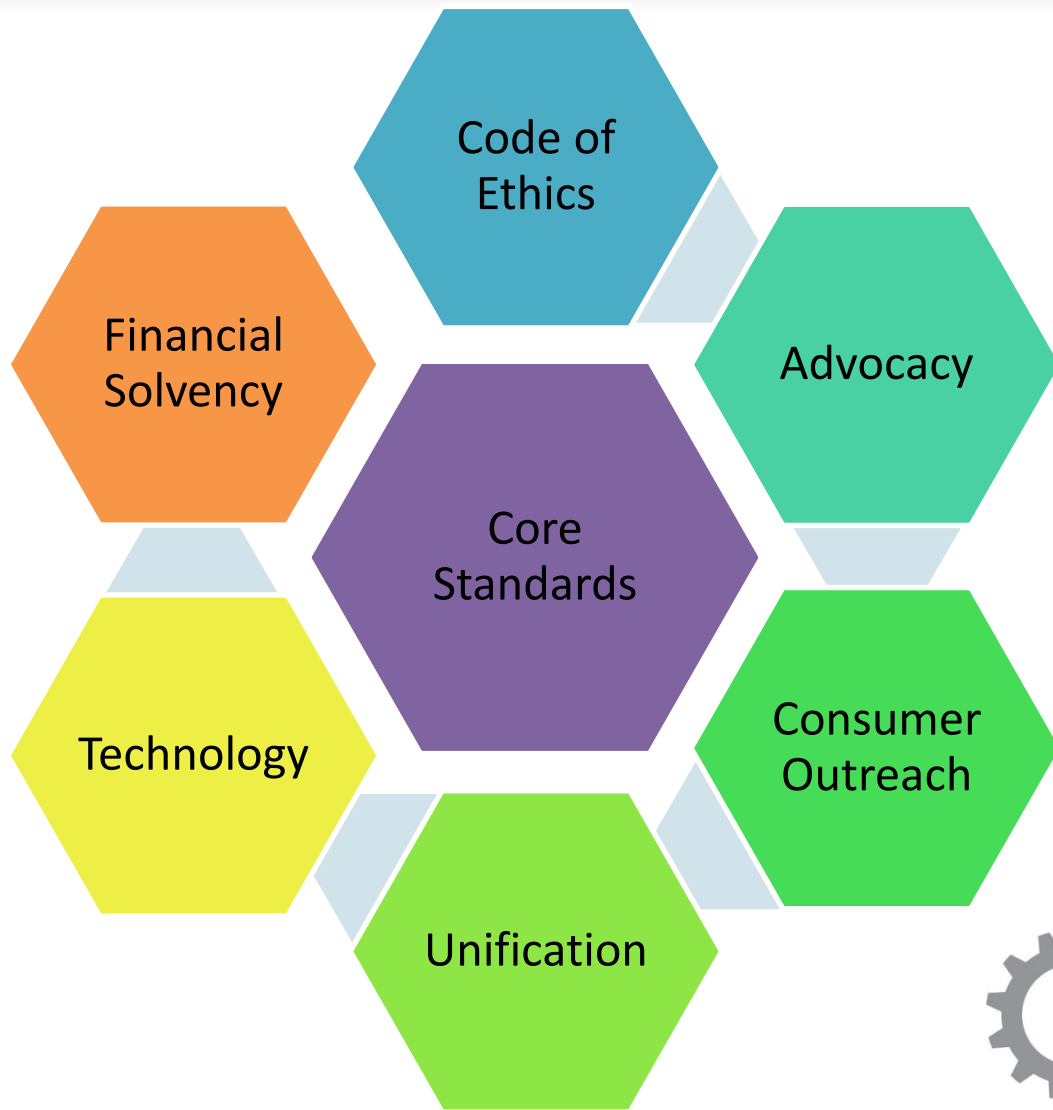
CORE STANDARDS FOR NEW AEs

John Sebree, RCE

Missouri REALTORS®

Donna Stone, RCE

Jefferson City Area Board of REALTORS®



NAR Organizational Alignment - Core Standards Certification Form

Association ID: 0848

Association Name: MISSOURI ASSOCIATION OF REALTORS®

President: Nate K Johnson **Email:** nate@livingstl.com

President Elect: Brenda Oliver **Email:** brenda@heritagerealtyodessa.com

Executive Officer: John M. Sebree **Email:** john@morealtor.com

2601 Bernadette Pl

Columbia, MO 65203

Phone: (573) 445-8400

Fax: (573) 445-7865

E-Mail: john@morealtor.com

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

Mandatory Core Standards for Associations 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](#)

--or--

[Submit Core Standards Certification form](#)

Section I - CODE OF ETHICS

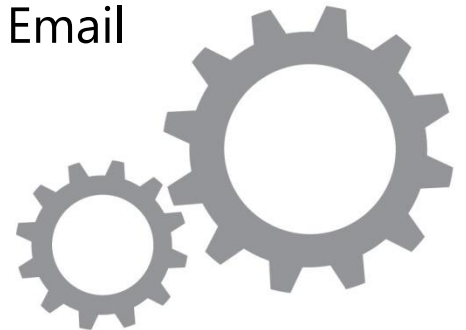
A. Core Standard: Every association will enforce the new and continuing member Code of Ethics training requirement established in Article IV of the NAR Bylaws



Core Standards for State and Local Associations

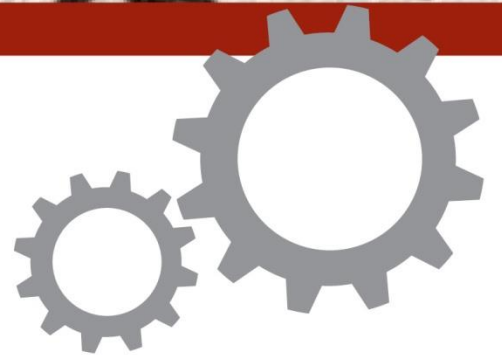
Tips to manage and complete the process

- Stay organized - Core Standards Folder on Desktop & in Email
- Create a Private Facebook Page
- Use the checklist on the NAR website (*Under Core Standards Resources*)



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CODE OF ETHICS



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?

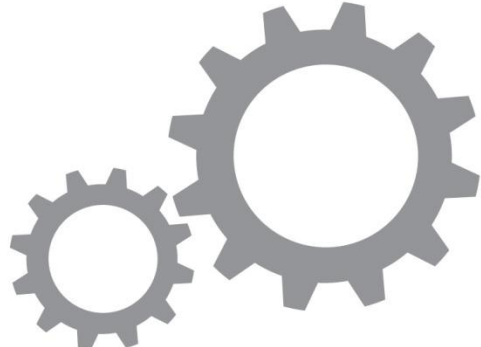
Yes No

TIP: Find out who you have a cooperative agreement with



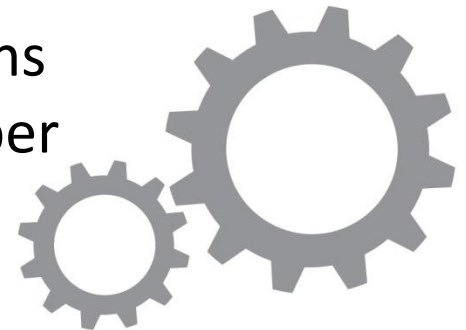


ADVOCACY



Just for 2020...

The NAR Leadership Team approved a recommendation submitted by the Association Executives Committee and the AEC Core Standards Work Group to suspend portions of Core Standards that require in-person interaction for the current cycle ending December 31, 2020. While there were requests to waive all of the requirements to satisfy the Core Standards, the committee's recommendation to **waive Section 2, Standard E, and all of Section 3** was a more targeted way to ease burdens for local associations while still ensuring delivery of high-quality member services.



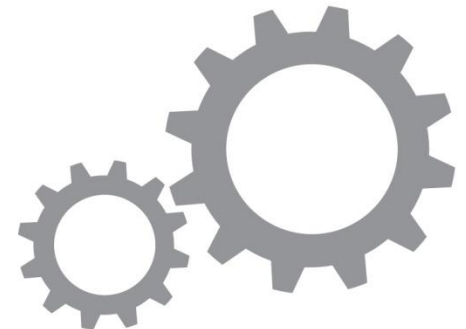
What is Waived for 2020...

Section 2, Standard E

Core Standard: Every association must support the REALTOR® Party's "Vote-Act-Invest" goals and must annually conduct at least two initiatives or activities furthering or supporting each of those three goals respectively.

Section 3, All

Every association will demonstrate engagement in at least four meaningful consumer engagement activities annually, including at least two activities demonstrating how the association is the "Voice for Real Estate" in its market, and at least two activities demonstrating the association's involvement and/or investment in the community.



Section II – ADVOCACY

RPAC, Calls for Action, VOTE, ACT, INVEST

A. Core Standard:

Note: Funds are to be sent to RPAC or the PAF/CAP (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.

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 Selected Question 9 or 10

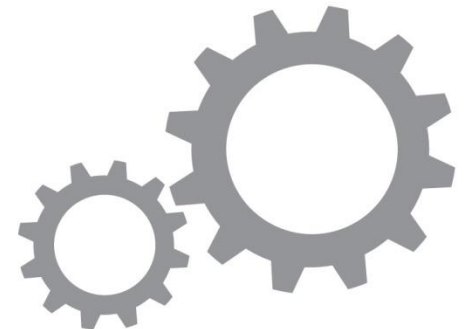
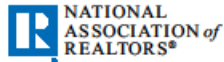




2020

REALTOR® Party Resource Guide

Resources, tools and funding information to help state and local REALTOR® Associations create, implement and sustain successful advocacy and community outreach programs.



<https://realtorparty.realtor/>

Campaign Services

- Case Studies
- Find Your Elected Official
- GAD Resources
- IE Program Map
- REALTOR® Voter Map

Community Outreach

- Better Block Guide
- Community & Transportation Preference Survey
- Community Outreach Toolkits
- Diversity Toolkit
- Employer-Assisted Housing Guide
- Growth Management Fact Book
- Housing Opportunity Resources
- Housing Pulse Survey
- Land Use Memo Database
- On Common Ground Magazine
- Walkable Community Resources
- Workforce Housing Forum Guide

Member & Consumer Mobilization

- Broker Involvement Reports
- Broker Participation Map
- FPC Resources
- File an RPMIC Report
- File an FPC Report
- REALTOR® Party Mobile Alert (RPMA)
- RPMA Goals Report

Calls for Action (CFA)

- TAKE ACTION
- CFA Reports
- CFA Request Form
- CFA Toolkit

RPAC & Political Fundraising

- Customized RPAC Marketing Materials
- Fundraising Goal Policies
- PAC Management System
- Phone Bank Resources
- REALTOR® Association Mobile Processor (RAMP)
- RPAC Brochures
- RPAC FAQs
- RPAC Fundraising Guide
- RPAC Fundraising Tracker
- RPAC Disbursements
- RPAC Legal & Tax Resources
- RPAC Monthly Reports
- RPAC Online Posting Guidelines
- Young Professionals Network (YPN) RPAC Pledge

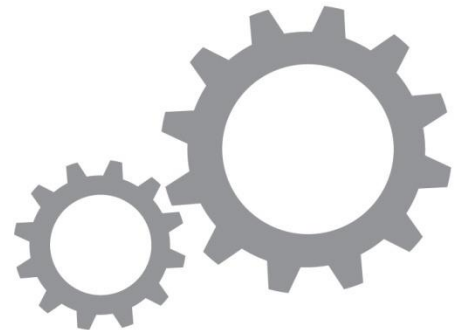
REALTOR® Party

- Advocacy Territorial Jurisdiction
- Legislative Priorities Survey
- Logos and Graphics
- REALTOR® Party Resource Guide
- REALTOR® Party New Member Orientation
- REALTOR® Party Tracker
- State Issues Tracker
- State Legislative Monitor



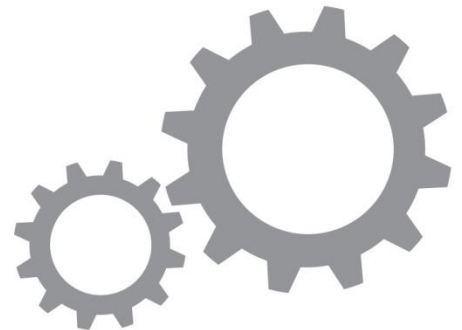
VOTE-ACT-INVEST AND CONSUMER OUTREACH INITIATIVES IN A SOCIAL DISTANCING ENVIRONMENT

<https://www.nar.realtor/sites/default/files/documents/Core-Standards-Physical-Distance-Activity-09-08-2020.pdf>



★ VOTE ★

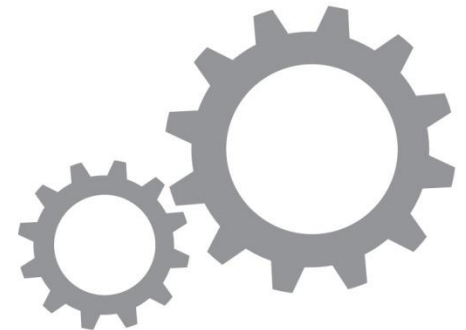
- Voter registration
- Get Out the Vote
- Candidate interviews



IN A SOCIAL DISTANCING ENVIRONMENT

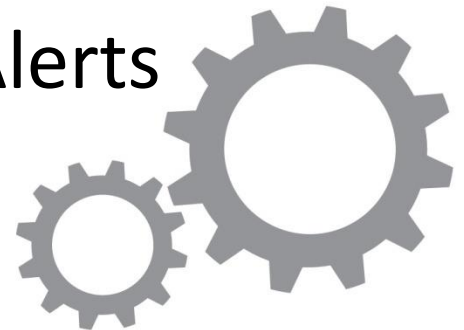
VOTE

- Conduct a Get Out the Vote promotion to members (for Primary and for General)
- Inform members about Primary election changes (if any)
- Conduct candidate interviews virtually with RPAC Trustees/Government Affairs committee
- Host a virtual training for future candidates
- Conduct a voter registration drive online
- Text voting locations on election day (Primary & General)



★ ACT ★

- Distribute “On Common Ground” Magazine
- Submit comments on a real estate regulation/advocate for public policy in another way
- Promote REALTOR® Party Mobile Alerts



IN A SOCIAL DISTANCING ENVIRONMENT

ACT

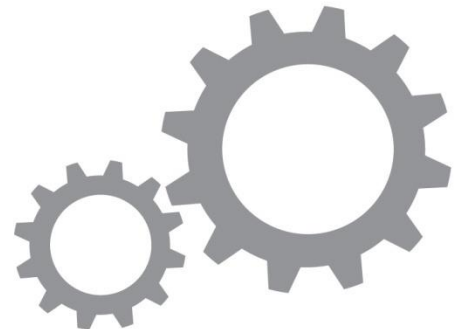
- Promote the COVID-19 text for information
- Promote the Broker Involvement program
- Use the Consumer Advocacy Outreach program to inform consumers of trending issues or housing policies in the community
- Conduct online community sessions on public policy
- Conduct Fair Housing event virtually
- Conduct Housing Counseling community event virtually
- Conduct first-time homebuyer's education series virtually
- Increase the number of members signed up for Calls for Action (CFA) using the member list provided by the REALTOR® Party, so we can send targeted emails and text messages to these individuals.
- Organize a virtual conversation with a candidate/public official
- Conduct a weekly "flash survey" of members in an ongoing effort to assess the economic pulse of residential and commercial markets in the state and to generate interest within the REALTOR® community, the governor's office, and top business leaders.
- Encourage members to sign up for [REALTOR® Party Mobile Alerts \(RPMA\)](#) to receive calls for action.

★ INVEST ★

- Host an RPAC Phone Bank

TIP: Take pictures to upload later!

- RPAC Presentation at Membership Meetings



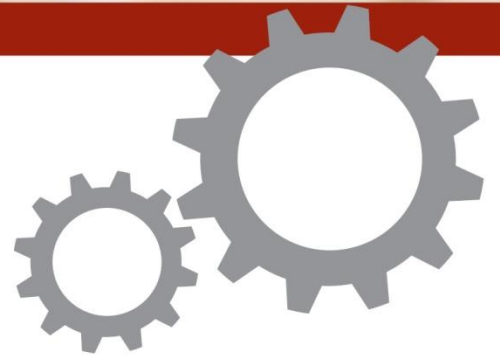
IN A SOCIAL DISTANCING ENVIRONMENT

INVEST

- Host an RPAC phone bank
- Host an online RPAC fundraising auction
- Provide RPAC brochures/flyers (general or customized/residential or commercial)
- Conduct virtual fundraising events/major investor events including: cooking class with popular local chef; craft cocktail/wine tasting; drive-in movie night (rent out facility for private showing); private musical performance
- Host virtual tour fundraising events (stadium, zoo, museum, behind the scenes at theater)
- Host a TED Talk event
- Host a gift card auction that also supports local businesses



CONSUMER OUTREACH



Section III - CONSUMER OUTREACH

Every association will demonstrate engagement in at least four meaningful consumer engagement activities annually, including at least two activities demonstrating how the association is the "Voice for Real Estate" in its market, and at least two activities demonstrating the association's involvement and/or investment in the community.

TIP: You cannot use the same event for more than one example here

1. 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.)

2. Community involvement and investment -- promoting the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®



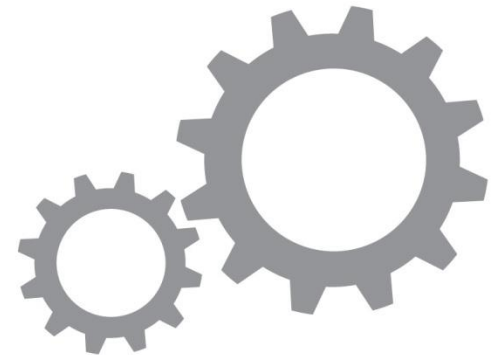
IN A SOCIAL DISTANCING ENVIRONMENT

CONSUMER OUTREACH

- Purchase ad space in local publications and on billboards around the state promoting support for medical personnel and essential workers, as well as promoting social distancing and reminding the public to stay at home.
- Partner with a local women's shelter by promoting a "donation" link to all members. Members can donate to the shelter's "wish list" via Amazon, to assist the organization at this critical time. As the pandemic continues, it is often women and children that are exposed to escalating abuse, and the shelter provides them an escape.
- Conduct a webinar for the public on real estate and the impact of COVID-19 with a panel of highly respected commercial and residential REALTORS®. Invite the media, local nonprofits, housing-related charities, economic development groups, governmental entities, elected officials, etc.
- Purchase items via an Amazon wish list for families in need of supplemental food items due to lost jobs/income. Items are shipped to the association office and association staff facilitates delivery. The board matches the donations.



UNIFICATION EFFORTS & SUPPORT OF THE REALTOR® ORGANIZATION



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

Bylaws Compliance Process

- Certify (at least every two years) that your Association bylaws include mandatory provisions that NAR required be adopted verbatim

Legal Counsel

- This can be an attorney on staff or, more likely, an attorney on call
- Can also be your state association if they provide legal services

State & Local Tax Returns

Corporate Documents and Filings



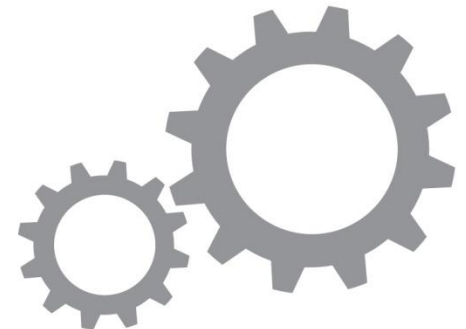
Strategic Plan

- Must include **Advocacy** and **Consumer Outreach** components.
-

Staff Professional Development Opportunities

- Local and state association chief paid staff must attend at **least six hours** of REALTOR® association professional development on an annual basis. (i.e., state, regional or national)

TIP: With the AE Institute, you're DONE!



Chief Staff Performance Evaluation



Chief Staff Performance
Evaluation

Process Guidelines &
Considerations

Process Scenarios

Sample Evaluation Forms

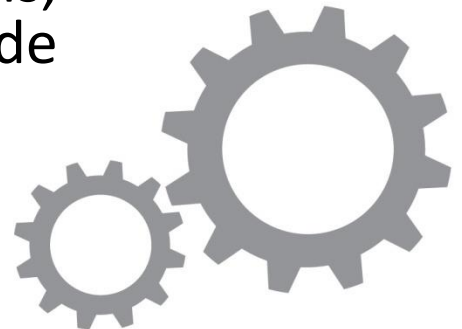
REALTOR® Association
Resource Exchange (RARE)



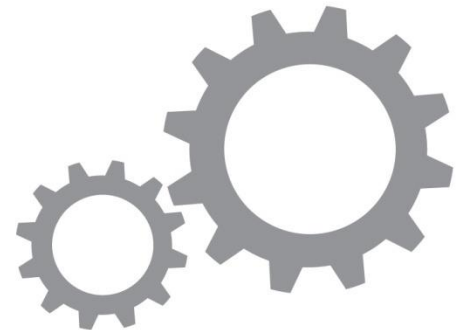
Member/Leader Professional Development Opportunities

- Associations must annually offer, **promote** or provide at least one professional development opportunity for members.
- Associations will annually provide resources for or access to leadership development education and/or training for their elected REALTOR® leaders, and will document the training, tools, programs, and resources they offer or provide access to.

TIP: With the NAR Leadership Summit in August, you've handled the Leadership requirement!



REALTOR[®] SAFETY





TECHNOLOGY



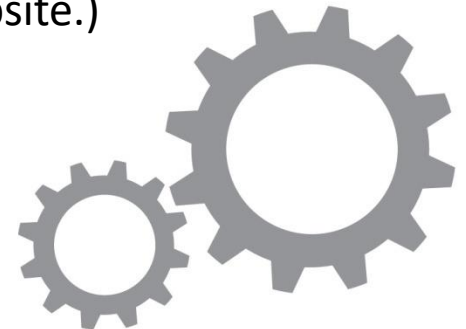
Section V - TECHNOLOGY

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

59. Website URL:

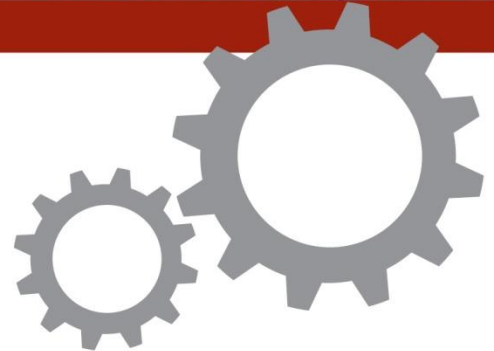
B. Core Standard: Every association must utilize an email and/or internet-based means for member communication.

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





FINANCIAL SOLVENCY

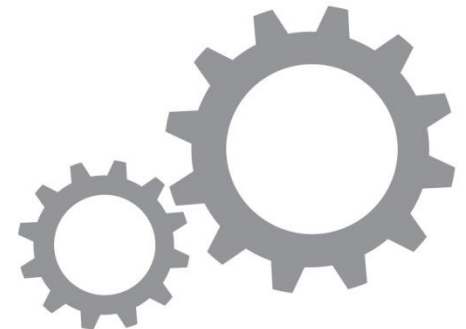


Section VI - FINANCIAL SOLVENCY

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:

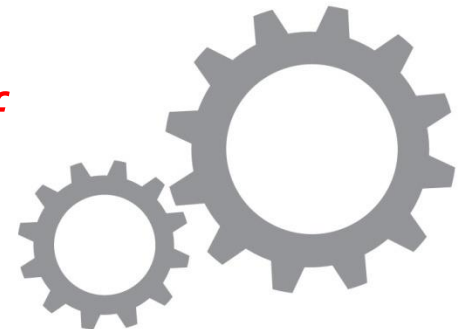
[NAR Resources](#)

- Finance Division Principles of Operations
- Budget Policy
- Employee Conflict of Interest Policy
- Member Conflict of Interest Policy
- Employee Travel Policy
- Member Travel Policy
- Fraud Prevention Process and Controls
- Non-Disclosure (Confidentiality)
- Agreement Policy
- Non-Solicitation Policy
- Whistleblower Policy
- NAR Statement of Investment Policy



Mandatory Core Standards

- Every association must have an annual audit, review or compilation conducted by a CPA.
- Only those associations with annual gross revenue of less than \$50,000 (including MLS-generated revenues and revenues from other business subsidiaries) 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.
- Associations must include a copy of the cover letter from the firm completing the association's financial audit/review/compilation. *A copy of the actual report is not required.*





More TIPS

Check the archive for what was submitted in the past

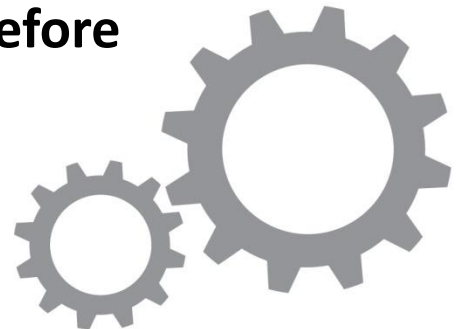
Have a  Page

Find out what your state requires for deadlines and early submits

Have a process for gathering and uploading information for the compliance tool

Be sure your officers review the compliance tool before submission

Less is more, don't over answer each question!



THANK YOU.



NARdotRealtor



nar.realtor

