



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

Phone: 222-222-2222

Fax: 333-333-3333

E-Mail: mail@mail.com

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 | --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.

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 if available. 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. Starting January 1, 2016 every association must offer ombudsman services to members and their clients and customers and may implement a "citation" enforcement policy.

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

Yes No

Please list the name(s) of the association's mediators

6. Does the association currently offer ombudsman services?

Yes No

Please list the name(s) of the association's ombudspersons

7. While not required by NAR, 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.

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 share with its members information and communications from NAR and from the 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).

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

- ☐ Yes
- ☐ No

If yes, please check the method(s) used to communicate with your membership about RPAC.

- ☐ 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 method(s) used to promote 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.)
- ☐ Posted on MLS sign-on page
- ☐ In Person (e.g. Membership Meetings, Sales Meetings, etc.)
- ☐ Delivered via the Realtor® Action Center
- ☐ Other digital materials
- ☐ Other printed materials

(Note: State associations can 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 method(s) used to generate 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.)
- ☐ Posted on MLS sign-on page
- ☐ In Person (e.g. Membership Meetings, Sales Meetings, etc.)
- ☐ Other digital materials
- ☐ Other printed materials

13a Please check if there were no State Calls to Action as of the date this certification was completed.

☐ No State Calls to Action

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

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

14. Please check the REALTOR® Party initiatives conducted by the association and upload at least one example:

- ☐ 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
- ☐ Promoting participation in the Broker Involvement Program
- ☐ Polling & Research (members)
- ☐ Voter Registration Initiative (members)
- ☐ Advocating for public policy in other ways (please upload an example)
- ☐ Conducted a Choosing REALTOR® Champions course
- ☐ Use the Land Use Initiative to advocate on a proposed local land use initiative
- ☐ 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)

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 1: 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.)

(Note 2: 15-39 that follow is a non-exclusive list of examples of activities that evidence compliance with the Core Standards Consumer Outreach criteria. Associations are not expected to have conducted every activity offered as examples, and the fact that most are answered with "no" or are left blank will not affect compliance, provided that at least four (4) compliant activities in at least three (3) of the categories shown above have been conducted.)

(i) Being the "Voice for Real Estate"

Check any of the following activities your association has completed:

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

If checked, 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.

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


If checked, 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.


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


If checked, 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. If checked, 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.

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

Other: Please describe below other activities conducted demonstrating how your association is the "Voice for Real Estate". Supporting documentation may be attached.

 **Attach Document**


(ii) Community involvement

20. Check any of the following activities your association participated in or completed, and attach at least one example 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**

Please check each of the following activities your association conducted:

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.


If checked, upload a scanned copy or screen capture.

 **Attach Document**

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

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

If checked, 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 participated in job or small business fairs.

If checked, upload a copy of the promotional material that mentions your association.

[Attach Document](#)

25. ☐ Sponsored homeownership fairs.

If checked, upload a copy of the promotional material that mentions your association.

[Attach Document](#)

26. ☐ Sponsored a tour of vacant commercial property.

If checked, upload a copy of the promotional material that mentions your association.

[Attach Document](#)

27. ☐ Sponsored a seminar on investing in commercial property.

If checked, upload a copy of the promotional material that mentions your association.

[Attach Document](#)

28. ☐ Promoted an open-house weekend.

If checked, upload a copy of the promotional material that mentions your association

[Attach Document](#)

29. ☐ Provided material that helps members reach out directly to consumers.

If checked, upload a sample of the material.

[Attach Document](#)

30. ☐ Reached out to consumers and homeowners to tell them what your association has accomplished in public policy issues that they might be concerned about.

If checked, provide an example (e.g. a press story, a Tweet or Facebook posting, or a summary of the legislation or regulation) that demonstrates what your association accomplished.

[Attach Document](#)

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

If checked, upload a sample of these materials.

[Attach Document](#)

Other: Please describe other activities conducted demonstrating your association's "Community Involvement". Supporting documentation may be attached.

[Attach Document](#)

(iii) Advocacy efforts

32. Check any of the following activities your association participated in or completed, and attach at least one example 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.

If checked, 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 relevant local issues.

If checked, 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 an issue.

If checked, upload a copy of the materials and/or communications provided to members.

 **Attach Document**

Other: Please describe other activities conducted demonstrating your association's "Advocacy Efforts". Supporting documentation may be attached.

 **Attach Document**

(iv) Community investment

36. Check any of the following activities your association has participated in or completed, and attach at least one example 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.

If checked, upload a copy of related member communications, photos or news coverage of the association's 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.

If checked, upload a copy of related member communications, photos or news coverage of the association's participation in the event.

[Attach Document](#)

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

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

[Attach Document](#)

Other: Please describe other activities conducted demonstrating your association's "Community Investment" involvement. Supporting documentation may be attached.

[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. Association Bylaws - Date of most recent approval by NAR:

40a. MLS Rules and Regulations - Date of most recent approval by NAR (if applicable):

40b. MLS Bylaws - Date of most recent approval by NAR (if applicable):

Note: If any of the governing documents shown above have been submitted to NAR and review/approval is pending, please identify the document(s) and the date submitted to 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:

44a. Date of most recent approval by NAR:

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

(Note: Beginning July 1, 2015 associations are not required to submit their strategic plans or business plans to NAR for review, except where revisions/amendments are made to the plan's "Advocacy" or "Consumer Outreach" components. Strategic Plans should be sent to csgrantrequest@realtors.org)

[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 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.

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

Note: Associations are not required to adopt all of the financial policies suggested above, but must adopt and attach those deemed necessary to ensure the fiscal integrity of the association's operations.


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.

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

Update History

cliff niersbach 09/23/2015 02:20:01 PM

© 2015 Copyright. All Rights Reserved.
National Association of REALTORS®.

800-874-6500
Headquarters: 430 N. Michigan Avenue Chicago, IL 60611-4087
DC office: 500 New Jersey Avenue, NW Washington DC 20001-2020



CORE STANDARDS FOR STATE AND LOCAL
ASSOCIATIONS

Core Standards Resources

Code of Ethics | Advocacy | Consumer Outreach | Unification Efforts
and Support of the REALTOR® Organization | Technology | Financial
Solvency | Additional Publications and Videos

Code of Ethics

Code of Ethics Training Toolkit for AEs

This toolkit helps AEs administer and implement required REALTORS®
Code of Ethics Training Requirements.

Advocacy

RPAC Dues Billing

The RPAC Dues Billing document contains detailed information on
preparing and collecting RPAC investments as well as communication
and transfer of RPAC funds in order to meet the organizational
alignment core standards.

REALTOR® Party Resource Guide

The REALTOR® Party Resource Guide provides resources, funding,
and turn-key implementation tools to help state and local REALTOR®
associations run successful advocacy and community outreach programs.

RPR® Resources for Organizational Alignment Core Standards

RPR® offers a number of resources to help associations meet these
standards in the areas of communication, technology, education, and
advocacy.

Consumer Outreach

Consumer Outreach Strategic Plan Templates

Get help with your consumer outreach efforts. These strategic plan

In this section

[Core Standards Home](#)

[Core Standards FAQ](#)

[Compliance Criteria](#)

[Core Standards
Resources](#)

[Grants](#)

[Facilitators](#)

[Compliance Tool](#)

templates are specifically geared towards small, medium, or large associations.

Shared Services Toolkit

Shared services programs can help REALTOR® associations expand services and streamline management through strategic partnerships. Sharing services with other local associations can help all involved meet the Organizational Alignment Core Standards.

RPR® Resources for Organizational Alignment Core Standards

RPR® offers a number of resources to help associations meet these standards in the areas of communication, technology, education, and advocacy.

Unification Efforts and Support of the REALTOR® Organization

New Member Orientation Materials

NAR provides member associations with the tools and resources needed help welcome new members into the REALTOR® family, including online orientation.

Strategic Planning Resources Toolkit

The NAR Strategic Planning Resources toolkit will help familiarize you with the strategic planning process and provide resources for you to meet the core standards strategic planning requirement at your association.

Core Standards Professional Development Opportunities

View a list of professional development programs and courses available from NAR to help you meet the Core Standards Professional Development requirement.

RPR® Resources for Organizational Alignment Core Standards

RPR® offers a number of resources to help associations meet these standards in the areas of communication, technology, education, and advocacy.

Shared Services Toolkit

Shared services programs can help REALTOR® associations expand services and streamline management through strategic partnerships. Sharing services with other local associations can help all involved meet the Organizational Alignment Core Standards.

Association Merger Procedure

NAR's Association Merger Procedure page features guidelines and a

complete Merger Kit for associations wishing to explore the process of merging.

Alternative to Merging - Jerry Matthews presents a simplified merger process for small associations.

Geographic Chapter Bylaw Language - Sample bylaw provision authorizing operation of chapters – courtesy of the REALTORS® of Central Colorado.

Checklist of Merger Documentation - provides a sample list of essential documents associations will want to compile/complete prior to merger discussions and submission of merger application to NAR. Provided courtesy of Rick Harris.

Hearing Process

If an association does not meet NAR's core standards, it will be given an opportunity to appear before a hearing panel of the NAR Association Executives Committee to show cause why the association's charter status as a member board should not be terminated.

Technology

Core Standards Technology Resources

The Core Standards require associations to have an interactive website that gives members and consumers access to information and resources related to filing ethics complaints and initiating dispute resolution.

Access this at NAR's Member Policy area: Ethics Complaints, Arbitration Requests and Related Information.

Download or play back the recording of the Core Standards Website Building Webinar with Nobu Hata, NAR's Director of Digital Engagement.

Download Nobu Hata's presentation from the webinar.

RPR® Resources for Organizational Alignment Core Standards

RPR® offers a number of resources to help associations meet these standards in the areas of communication, technology, education, and advocacy.

Financial Solvency

Core Standards Financial Resources

State and local associations can use these model financial policy documents to help meet the Financial Solvency element of NAR's Core

Standards for State and Local Associations.

Additional Publications and Videos

"Standards & Beyond" - from the Summer 2014 issue of REALTOR® AE Magazine.

"Core Standards: What Comes Next" - In this video, NAR President Steve Brown explains the next steps for implementing core standards for ensuring associations provide a professional level of services to members.

©2015 Copyright. All Rights Reserved.
National Association of REALTORS®.

800-874
Headquarters: 430 N. Michigan Avenue Chicago, IL 60611
DC office: 500 New Jersey Avenue, NW Washington DC 20001