

## CHRONOLOGICAL CHECKLIST FOR NEW ASSOCIATION EXECUTIVES

Use this checklist as a general guide to get started in your new role as an Association Executive (AE). NAR hosts a [New AE Orientation program](#) that all new AEs are invited to attend. Details for the orientation program are sent to you directly when the upcoming program is announced. Be sure to register and attend!

### **WEEK 1:**

\_\_\_\_\_ Ensure that you are set up in NAR's central membership database [REALTORS® M1](#) and are provided with a personal M1 identification number. Your association's Point of Entry (POE) is the only person who can add or update your M1 record. The POE could be you or another staff member, or in some cases it could be the state association. If you need assistance during this process, please don't hesitate to reach out to NAR's M1 Ecommerce Support Team at [poesupport@nar.realtor](mailto:poesupport@nar.realtor) or 1-800-868-3225 from 8:00 AM - 6:00 PM Central Time, Monday through Friday. Make sure your personal M1 record is added to the "Association Executive" field of your association's office record in M1.

\_\_\_\_\_ After you are added to M1, keep an eye out for an email from NAR staff with resources and next steps as you get started in your new position. If you haven't received this email, please reach out to Amanda Brewer, Director of Association Development, at [abrewer@nar.realtor](mailto:abrewer@nar.realtor).

\_\_\_\_\_ Establish your account on NAR's [The Hub](#). The Hub is NAR's primary communication vehicle for updates, important dates, upcoming professional development opportunities, and more. As a new AE, you will be able to engage with the New Association Executives Hub community, and you will also be added to the main Association Executives Hub most pertinent to your association (local, state, or commercial).

\_\_\_\_\_ Address computer security by changing any existing passwords from the previous AE and backing up all your files. Do not overwrite existing files.

\_\_\_\_\_ View and access NAR's [resources for Core Standards](#). Core Standards are requirements that each local and state association must meet each year to continue their charter. When reviewing your association's [Core Standards Certification Form](#), make sure to contact your state association for their Core Standards deadline and review your association's submission for the previous year. If you have any questions regarding Core Standards, your state association is a great place to start. Questions regarding the Core Standards, including the Core Standards Certification Form, may be directed to NAR's Member Experience Team at [narpolicyquestions@nar.realtor](mailto:narpolicyquestions@nar.realtor) or 312-329-8399.

\_\_\_\_\_ Study your association's bylaws and **be sure** to continue to reference them throughout your onboarding and as you learn your role. Bylaws are the foundation of the association and must be followed to ensure that the association is protected and following the approved governance structure.

\_\_\_\_\_ Secure association financial records, documents, audits, and tax returns.

## **WEEK 1 CONTINUED:**

\_\_\_\_\_ Review your association's financial policies in-depth. Based on your policies, make sure that any financial accounts, credit card(s), bills, utilities, etc. have the proper signatory and contact information. Make sure you also update your insurance provider. If your association is lacking financial policies, NAR has [Core Standards Financial Resources](#) that local and state associations can use to help meet the Financial Solvency element of NAR's Core Standards.

\_\_\_\_\_ Learn your association's policies and procedures that supplement your bylaws. Policies and procedures build upon your bylaws and provide structured guidance on protocols. Review your employee manual in-depth. If written policies do not exist, visit NAR's [Good Sense Government resources](#), and add creation and approval of policies as one of your 30-60-90-day goals.

\_\_\_\_\_ Meet with your association's accountant/bookkeeper (if applicable) to address the following:

- Accountant's roles and responsibilities
- Sales tax and tax deposits
- Property taxes
- Tax returns and filing requirements.
- Protocols for handling money
- Identify authorized signors of the association and amount limits (per policies)
- Discuss a financial audit if necessary.

\_\_\_\_\_ Document all the association's fiscal and physical assets, including building and technology equipment. Review your capital expenses and schedule.

\_\_\_\_\_ Meet with your staff as a whole and individually (if applicable) to review job descriptions and responsibilities. Discuss what type of management style helps that staff member excel and express your leadership style. If needed, review sample job descriptions for local and state association staff in the [REALTOR® Association Resource Exchange \(RARE\) Database](#).

\_\_\_\_\_ Meet with your president to discuss roles and responsibilities. For guidance, review the [President/Chief Staff Executive Checklist](#) with your president to identify responsibilities of each role.

\_\_\_\_\_ Meet individually with each of your board of director members and executive committee members.

\_\_\_\_\_ Meet with the treasurer to review the budget.

\_\_\_\_\_ For local AEs: Contact your state association to introduce yourself, as they may not know the association has a new AE. Request that they update their records with your information. Inquire about "must-know" information and important upcoming dates that need to be on your calendar. Ask who the preferred contact is at the state association if you have further questions.

\_\_\_\_\_ Introduce yourself to the association's legal counsel and understand the protocol established for their services.

## **WEEKS 2-4:**

\_\_\_\_\_ Utilize the [Organization Assessment Checklist](#) to help you identify and learn the basic operational responsibilities of the association and how they are managed.

## **WEEKS 2-4 CONTINUED:**

\_\_\_\_\_ Familiarize yourself with the association's website and social media accounts. Gain understanding of the association's communication tempo and the systems used to execute newsletters, videos, etc.

\_\_\_\_\_ Identify and organize the association's vendors, contacts, and contracts. If there are existing vendor contracts in place, contact those companies for an introduction and provide the new contact information they should use moving forward.

\_\_\_\_\_ Locate the association's Articles of Incorporation and check with the Secretary of State on the status of the business.

\_\_\_\_\_ Note any upcoming time-sensitive activities and plan accordingly to ensure all important deadlines and goals are met. Examples:

- Election of officers
- Director elections
- Insurance renewals
- Executive Committee and/or Board of Directors meetings
- Core Standards
- Any required notices to membership
- Annual membership meeting
- Dues billing and payments to state association and NAR
- RPAC contributions

\_\_\_\_\_ Learn and understand the association's membership policies, including dues policies, non-member assessments, types of membership, board of choice, secondary memberships, your membership application, and new member requirements (NAR Code of Ethics training, orientation, etc.).

\_\_\_\_\_ Learn and understand the association's professional standards manual and identify the association's certified professional standards administrator. The state association may be providing these services to your association, or they may also be arranged through another local association.

\_\_\_\_\_ Know how to prepare for and coordinate meetings. Make sure to identify who needs to be involved with scheduling, setting the agendas, and attending each meeting. Understand the frequency of the association's committee meetings and the staff person required to attend, and make sure all association calendars are up to date, both internally and externally. Review NAR's [Answer Book](#) chapter on "Managing Meetings."

\_\_\_\_\_ Review the [M1 User Manual](#) to learn more about POEs, staff records, member records, and verify that the association's leadership is correct in the association's M1 profile.

\_\_\_\_\_ Take a moment to visit important websites and bookmark them for future use. These websites include the state association site, [nar.realtor](#), and the applicable MLS sites.

\_\_\_\_\_ Learn about the [REALTORS® Political Action Committee \(RPAC\)](#). Review [RPAC fundraising resources](#) on the REALTOR® Party website and check with your state association about any RPAC training they provide. Make sure to learn about federal and state laws governing PAC management.

\_\_\_\_\_ Reach out to your neighboring REALTOR® associations to introduce yourself and build rapport.

\_\_\_\_\_ Consider participating in NAR's mentor program, [AExcellence Exchange](#), and receive guidance from your peers on getting started.

## **MONTHS 2-4:**

\_\_\_\_\_ Review [NAR's conference schedule](#) and plan to attend the annual AE Institute (AEI). AEI is the premier professional development event for local and state REALTOR® association staff. AEI provides quality training for all association staff, from new to veteran.

\_\_\_\_\_ Take a deeper dive into the association's dues policies, as well as the state and [NAR dues policies that govern dues collection](#). Obtain the required dues disclosures, learn how the association transmits dues to the state and national association, and review the responsibility of the Designated REALTOR® for dues.

\_\_\_\_\_ Develop a strong understanding of the [Three-Way Agreement](#) between the local, state, and national association.

\_\_\_\_\_ Establish a deep understanding of the association's budget. Make sure you completely understand the association's budget process, revenue sources, and expenses. Understand who is included in the travel expenses, what types of items correspond to each GL, and make sure the policies established match the practice. Know the difference between the types of expenses that require approval from the Board of Directors and expenses that do not.

\_\_\_\_\_ Learn about NAR's Errors and Omissions (E&O) Insurance. Associations are covered through NAR's umbrella policy and must maintain certain requirements to continue coverage. Learn these requirements and what the program offers and covers. Know who to contact at NAR with questions, and make sure to inquire with the BOD each year to discuss purchasing additional coverage, if necessary.

\_\_\_\_\_ In addition to NAR's E&O Insurance, understand the association's additional coverage that is acquired individually. Review plans such as workers' compensation, business policy, indemnification clause for D&O, indemnification for building, bonding, etc.

\_\_\_\_\_ Check when the association's bylaws and MLS Rules (if applicable) were last certified by NAR. Questions regarding NAR's certification of the association's governing documents may be directed to NAR's Member Experience Team at [narpolicyquestions@nar.realtor](mailto:narpolicyquestions@nar.realtor) or 312-329-8399.

\_\_\_\_\_ If any association leader travels to state and/or national conferences, confirm who registers each individual and makes travel reservations. Asking previous leaders what is customary could be helpful, but always make sure to adapt a style that is conducive to you and your present leadership.

\_\_\_\_\_ Read [NAR's Code of Ethics and Standards of Practice](#) and understand what sets REALTORS® apart from nonmembers.

\_\_\_\_\_ NAR requires REALTOR® members to complete a [new member orientation program](#) that is administered by local associations. Gain a deep understanding of your association's new member orientation program and how it is executed. Make sure that it meets NAR requirements and that the program is offered in accordance with the completion timeframe in the bylaws.

## **MONTHS 5-7:**

\_\_\_\_\_ Visit [NAR's Center for REALTOR Development](#) and the available certifications and designations that can be offered to members to enhance their careers.

\_\_\_\_\_ Develop a strong understanding of liability issues, including antitrust, fair housing, E&O, and the MLS.

## **MONTHS 5-7 CONTINUED:**

\_\_\_\_\_ Learn the association's role in local legislative initiatives and get to know the people involved in local government. If your jurisdiction has a housing department or DEI department, introduce yourself and create opportunities for collaboration.

\_\_\_\_\_ Assess the association's strategic plan. Ensure the plan is up to date with all goals that have been accomplished noted and meet with association leadership to adjust completion dates and priorities as needed. If the association needs a strategic plan, review the [Strategic Planning Resources Toolkit](#), and begin work towards creating a strategic plan.

\_\_\_\_\_ If the association operates a store, learn the ins and outs of the ordering and accounting processes, and what is required for inventory management.

\_\_\_\_\_ Locate and review the documents that correlate to your performance evaluation. Make sure you know what you are expected to accomplish and how your success will be measured. Learn the evaluation process, who provides input, and how goals are established. Visit NAR's [Chief Staff Performance Evaluation](#) page for more information.

\_\_\_\_\_ Reach out to the Designated REALTORS® (brokers and appraisers) in the association to schedule introductory meetings with you. Discuss this step with the president to inquire if they would like to attend these meetings with you. Inquire about attending an office meeting to introduce yourself.

\_\_\_\_\_ Take time to learn basic real estate practices and understand the business of association members. Subscribe to industry publications and resources, with topics such as:

- MLS issues
- Real estate terminology
- Forms
- Independent contract status
- Brokerage structures
- Agency
- Financing
- Affiliate services impacting transactions
- Personal assistants and office managers
- Risk management
- Title

## **MONTHS 8-12**

\_\_\_\_\_ If one does not exist, establish an internal annual calendar for the association to ensure all critical dates and timelines are met and accounted for.

\_\_\_\_\_ Review employee job descriptions to verify they are up to date based on your assessment of the organization over the last year.

\_\_\_\_\_ Explore professional development opportunities to continue your growth. A great place to start is [NAR's Association Executive Resources page](#) on [nar.realtor](#).

\_\_\_\_\_ Take time to review [NAR's Value Proposition Toolkit](#) to help you understand the importance of a value proposition and begin your association's process, if necessary.



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