

**Local Association
Operational Procedures At-a-Glance**

The following list of operational practices and procedures will serve as a quick reference for AEs and volunteer leaders looking for guidance in managing the REALTOR® association.

Activity	By Practice	By Assn. BOD	Bylaws	Policy/Procedure Manual
Local Leadership				
Who appoints Committee Chairs?				
Who appoints Nominating Committee?				
Does Education Director Travel?				
Does Governmental Affairs Director Travel?				
What Other Staff Travels?				
Is there a Leadership Ladder?				
Do BOD members pay to attend Assoc. Events?				
Who pays expenses for NAR Directors?				
Are there Credit Cards for Leadership Use?				
What leadership receives Credit Cards?				
Is there a Leadership Travel Policy?				
How are BOD vacancies filled?				
Who can call meetings of the BOD?				
Is there an Executive Committee?				
What authority does Executive Committee have?				
How are volunteers selected to serve on committees?				
What are your committees?				
State Leadership				
How many State Reps are Appointed?				
How many State Reps are reimbursed for travel?				
Who appoints State Reps?				
Who attends meetings, and what are those meetings?				
NAR Leadership				
How many NAR Reps are Appointed?				
How many NAR Reps are reimbursed for travel?				
Who appoints NAR Reps?				

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Administration				
Does the CEO have "free reign" on spending, within the constraints of the budget?				
Who signs any contracts?				
Does communication have to be pre-approved by Leadership?				
Who is responsible for media communication?				
What Assn. staff are bonded?				
Who has authority to seek legal advice and counsel?				
Where are the passwords kept?				
Who conducts performance reviews and when?				
Does the association have NAR Optional Insurance?				
How many bids are required prior to signing contracts?				
How is office staffing decided?				
Who determines assn office hours?				
Do we participate with NAR Get Active?				
Who remits RPAC contributions?				
Where are all the governing documents of the association?				
Who is the legal team?				
Who maintains the website, domain names?				
Is there a calendar for annual board events?				
Where are the board events held, ie hotel, club, restaurant?				
Who makes the reservations?				
Who organizes events; staff or committee?				
What events are run by committees?				
Is there a strategic plan in place? If so, is it reevaluated and updated each year?				
Who is the administrator for assn health insurance, corporate documents, payroll, etc.				
Is the board attorney on retainer or is it a fee for service arrangement?				
Does assn insurance offer off-site coverage for events?				
Do we have an office preparedness plan?				
How is computer system backed-up?				

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Do we have a nonprofit foundation?				
Is there an IT policy?				
Education				
Does the board operate a school?				
Is the school certified to offer state continuing education classes				
Who is the school administrator?				
What is the assn policy on fees for education classes?				
Does the assn prefund or subsidize designation classes?				
Does the assn offer non business hour classes; nights,saturdays?				
Is there a Leadership Development Program in place?				
Does the board hold leadership training for the BOD each year?				
If so, is it held at the office or off site.				
What materials are provided to new directors?				
Professional Standards				
Who does professional standards administration and where are all the information on all cases?				
Does the board attorney attend the arbitration and ethics hearings?				
How many are appointed to Grievance/Professional Standards Committee?				
What are committee terms?				
When do committees meet?				
Who appoints panels?				
Does staff liaison attend hearings?				
Financials				
Who has check signing authority?				
How many signatures are required for check signing?				
Where are the bank accounts located?				
What are the restrictions on bank accounts?				
Does any staff have credit cards?				

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Who handles assn investment accounts?				
Who determines assn investments?				
Does the association accept credit cards payments?				
Do we participate with NAR e-commerce?				
Where is petty cash kept?				
Who develops financial reports?				
who is the accountant?				
What is the accounting system software?				
What is the accounting system, accrual or cash?				
When are financial reviews/audits completed?				
Who maintains assn books i.e. minutes past financials policies etc?				
Who is the master account holder on credit cards?				
What is the desstruction policy for credit card payments?				
Dues Administration				
When are all dues invoices due and/or paid?				
What is the process for dues collection?				
Are invoices emailed, mailed individually, sent to the broker?				
How much is the returned check fee?				
When are dues billed?				
Is there a late fee, reinstatement fee or other penalties, if so what is the grace period?				
MLS Administration				
When do vendor contracts expire?				
What is the fee billing cycle to participants and subscribers?				
Is the MLS a committee or corporation?				
Do vendor contracts automatically renew/when?				
Facility				
Who has keys to the building?				
Who does the maintenance, cleaning, etc.?				
Who is our insurance carrier for the building?				

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Where are all the documations for tax purposes?				
Where is information on all office equipment?				
Where do the office supplies come from - contracts?				
Who is authorized to purchase office supplies?				
where is the information on all service providers i.e. sprinklers, snow removal, lawn care, etc.?				
Who is authorized for security system?				
Who is authorized to sign lease?				
Who is property manager/landord?				
When does lease expire?				
Do you rent out meeting/event space?				
What is the charge for meeting/event space rental?				