



NATIONAL  
ASSOCIATION *of*  
REALTORS®

# Campaign & Election Process Manual

## For Candidates Seeking a National Office

Effective November 7, 2016

## **TABLE OF CONTENTS**

A. Definitions .....	3
B. Candidate Application Deadlines .....	5
C. Candidate Endorsements .....	5
D. Campaign Financial Support.....	6
E. Permitted Potential Candidate Campaign-related Activities .....	6
F. Potential Candidate Review Process .....	7
G. Eligible Candidate Required Criteria and Quarterly Reports .....	7
H. Potential Candidate Review: Financial Audit, Legal Audit, and Criminal Background Check .....	8
I. Potential Candidate Appeal Process.....	10
J. Notification of Eligible Candidates .....	11
K. Campaign Rules for Eligible Candidates.....	11
L. Campaign Rule Violation Complaint Process, Sanctions and Appeal Process .....	12
M. Election and Installation of Officers .....	15
N. Credentials and Campaign Rules Committee .....	15
O. Candidate Audit Work Group.....	17
P. Campaign Endorsement Policies for CCRC Members .....	17
Q. NAR Elected Positions: Desired Qualifications.....	18
R. NAR Elected Offices: Functions, Duties, Responsibilities and Authority.....	21

## **A. DEFINITIONS**

**CAWG** means the Candidate Audit Work Group.

**CCRC** means the Credentials and Campaign Rules Committee.

**Elected Officers** means the President, President-Elect, First Vice President, Treasurer, and Regional Vice Presidents.

**Elected Offices** means the office of President-Elect, First Vice President, Treasurer and Regional Vice Presidents.

**Eligible Candidate** means a Potential Candidate who has been deemed eligible by the CCRC to run for NAR Elected Office.

**Eligible Candidate Required Criteria** means the four criteria outlined in Section G.

**Individual Endorsement** means an endorsement by a Member.

**Institutional Endorsement** means non-individual endorsements (i.e. by a region, or a state or a local association).

**Interested Member** means a Member who is interested in campaigning for an NAR Elected Office, but who has not yet filed an NAR Application for Elected Office.

**Member(s)** means any NAR member.

**NAR** means the National Association of REALTORS<sup>®</sup>.

**Notification Date** means the date on which the list of Eligible Candidates is released, which shall be August 1, or the first business day thereafter, of *the year prior* to the year in which the Eligible Candidate's election will be held.

**Potential Candidate** means a Member who has filed an application for NAR elected office, but who has not yet been deemed an Eligible Candidate.

**Submission Period** means the period beginning January 1 and ending February 15 *of the year prior* to the year in which the Interested Member's election would be held.

## **B. CANDIDATE APPLICATION DEADLINES**

### **Submission Period**

An Interested Member must file an NAR Application for Elected Office during the Submission Period.

### **Emergency Application Process and Deadline**

If at any time after the Submission Period: 1) the CCRC determines it did not receive any applications for a specific Elected Office; 2) no Potential Candidates were deemed eligible for a particular Elected Office; or 3) a Potential Candidate or Eligible Candidate withdraws their candidacy for a particular Elected Office for any reason, then the CCRC shall, within seven (7) days of any of the events listed above, open up a new application period lasting thirty (30) days, during which Interested Members may file an NAR Application for Elected Office for the office at issue. The CCRC shall announce the list of the Eligible Candidates who filed an application pursuant to an emergency application process by the Notification Date, if practicable, or the earliest date possible thereafter, as determined by the CCRC.

## **C. CANDIDATE ENDORSEMENTS**

### **1. Home State Association Endorsements:**

An Interested Member must receive their home state association's\* endorsement prior to submitting the NAR Application for Elected Office. Therefore, prior to any submission deadline, an Interested Member may discuss their intent to be a candidate with their home state association for the sole purpose of obtaining its endorsement.

A Potential Candidate may not publish a commitment of current or future endorsement by the Potential Candidate's home state association anywhere other than the NAR Application for Elected Office prior to notification of the Eligible Candidates. On or after the Notification

Date, Eligible Candidates may publish the endorsement of their home state association, as applicable.

\*For purposes of Section C(1) and Section D only, home state association shall include the region if a Potential Candidate resides in a state where regional endorsement is required.

**2. Institutional and Individual Endorsements:**

No institution or individual may (a) endorse an Interested Member, Potential Candidate or Eligible Candidate, (b) issue a letter of intent, or (c) take any other action which can be construed as a promise of endorsement before August 1 of the year prior to the year in which an Eligible Candidate’s election would be held.

**D. CAMPAIGN FINANCIAL SUPPORT**

Potential Candidates may only accept a commitment of or receive campaign financial support from their home state association.

Beginning on January 1 of the year in which an Eligible Candidate’s election is held, an Eligible Candidate may begin accepting commitments of and receiving campaign financial support from any individual or institution.

**E. PERMITTED POTENTIAL CANDIDATE CAMPAIGN-RELATED ACTIVITIES**

After the Submission Period, or any emergency submission deadline, but prior to the notification of eligibility, a Potential Candidate’s campaign-related activities are limited to the following: 1) appearing before a group within the Potential Candidate’s home state; 2) creating, but not distributing, campaign materials; 3) assembling a campaign team of up to fourteen (14) individuals, whose names must be submitted to the CCRC, and may include individuals from within or outside of the Potential Candidate’s region; or 4) building, but not publishing, a campaign website or campaign social media site.

The fourteen (14) members of a Potential Candidate's campaign team must be identified by no later than the Submission Period. Prior to the Notification Date, the Potential Candidate may only change an individual on their campaign team for good cause, and upon obtaining the prior approval of the CCRC.

## **F. POTENTIAL CANDIDATE REVIEW PROCESS**

Following the Submission Period, the CCRC shall review all timely-filed NAR Applications for Elected Office, and conduct a legal audit, financial audit, and criminal background check on each Potential Candidate.

## **G. ELIGIBLE CANDIDATE REQUIRED CRITERIA AND QUARTERLY REPORTS**

1. **Eligible Candidate Required Criteria\***: In order to be deemed an Eligible Candidate, a Potential Candidate must meet, and an Eligible Candidate must maintain, the following required criteria ("Eligible Candidate Required Criteria"):
  - No personal bankruptcy within the last 7 years
  - No personal foreclosures within the last 7 years
  - Credit score at or above the baseline required for a mortgage backed by the FHA
  - No current delinquent tax filings and/or payments

\*A Potential Candidate must meet the Eligible Candidate Required Criteria as of the end of the Submission Period.

2. **Quarterly Reports**: Eligible Candidates and Elected Officers are required to submit a quarterly report within fifteen (15) days of the end of each calendar quarter confirming that they continue to meet the Eligible Candidate Required Criteria. The quarterly reports shall be reviewed by the CAWG.

## **H. POTENTIAL CANDIDATE REVIEW: FINANCIAL AUDIT, LEGAL AUDIT, AND CRIMINAL BACKGROUND CHECK**

1. The following review shall be conducted on each Potential Candidate:

**a. Financial Audit:**

A financial audit will be conducted to ascertain a Potential Candidate's ability to accept the financial burdens of holding an NAR Elected Office. The financial audit will be conducted by NAR's outside financial auditor, who shall be provided with the Potential Candidate's financial disclosure statements and credit report. The outside financial auditor shall review such documents and identify any material issues for the CAWG's review.

**b. Legal Audit and Criminal Background Check:**

A legal audit shall be conducted on any previous or pending matters against the Potential Candidate, their firm(s), and firm(s) in which the Potential Candidate is a principal, partner or corporate officer, in each of the following three categories:

- i. Pending federal, state and county litigation and/or regulatory action;
- ii. Final judgments; and
- iii. Disciplinary actions.

In addition, a criminal background report shall be pulled for each Potential Candidate. The legal audit and criminal background check shall be conducted and reviewed by the NAR Office of General Counsel.

2. **CAWG Potential Candidate Review:** The results of the financial audit, legal audit and criminal background check shall be submitted to the CAWG for review. In addition to ensuring a Potential Candidate meets the Eligible Candidate Required Criteria, the CAWG may also consider other material issues revealed by the Potential Candidate

or those revealed through the financial audit, legal audit and/or criminal background check. Examples of such additional issues that may be considered material include, but are not limited to, the following:

- Liens
- Bankruptcies (personal and business)
- Foreclosures
- Three or more accounts with late payments (60 or more days) in the current year
- Code of Ethics violations resulting in termination or suspension of membership
- Delinquent child support payments
- Late tax filings and/or payments
- All convictions excluding traffic violations (however driving under the influence is considered a material issue)\*
- Regulatory investigations (personal or company) if a violation was found\*
- Pending regulatory investigations (personal or company)\*
- Pending litigation (personal or company)\*
- Judgments (personal or company)\*
- Compliance with established NAR campaign rules

\*Reportable conviction, regulatory investigations, pending litigation, judgments or facts or circumstances that could reasonably represent a source of embarrassment or liability to NAR or would present a conflict with the policies of NAR which the Potential Candidate would be called upon to uphold in their capacity as an officer, as determined by NAR's General Counsel.

After reviewing the financial audit, legal audit, and criminal background check, if the CAWG determines there are any material issues preventing a Potential Candidate from being deemed an Eligible Candidate, the CAWG will disclose such material issue(s) to the Potential Candidate. The Potential Candidate will be given thirty (30) days to correct any inaccurate information or offer the CAWG mitigating information related to such issue(s). In addition, the CAWG may, in its discretion, request a personal interview with the Potential Candidate.

Upon completion of the Potential Candidate review, the CAWG shall submit a final report of the Potential Candidates to the CCRC.

## I. POTENTIAL CANDIDATE APPEAL PROCESS

1. **Potential Candidate Appeal**: If a Potential Candidate is deemed ineligible by the CAWG, the Potential Candidate may file an appeal with the CCRC in accordance with the Potential Candidate Appeal Process outlined below.
2. **Potential Candidate Appeal Process**:
  - a. Within ten (10) days of receipt of a determination of a Potential Candidate's ineligibility, as determined by the CAWG, a Potential Candidate may file a written appeal with the Chair of the CCRC.
  - b. The Potential Candidate's appeal must include the following information:
    - i. Basis for Potential Candidate's appeal;
    - ii. Supporting documentation for the Potential Candidate's basis for the appeal; and
    - iii. Whether the Potential Candidate would like the opportunity to make their appeal in person.
  - c. Within ten (10) days of receipt of such appeal, the CCRC Chair shall forward a copy of the Potential Candidate's appeal and supporting materials to the full CCRC for its review.
  - d. If the Potential Candidate requested an in-person hearing, then, within five (5) days of receipt of the appeal, the Chair of the CCRC will notify the Potential Candidate of the date of the appeal hearing. If the Potential Candidate did not request an in-person hearing, the appeal shall be conducted via teleconference.
  - e. A majority of the CCRC committee (less members that compose the CAWG) must be present in order to conduct an appeal hearing.
  - f. Members of the CAWG may be present and participate in discussions, but will be excluded from voting.
  - g. A 2/3 vote of the CCRC members present (less members that compose the CAWG) must be reached in order to move a Potential Candidate forward as an Eligible Candidate.

- h. Within five (5) days of holding an appeal hearing, the Chair of the CCRC shall notify the Potential Candidate of the CCRC's decision in writing.
- i. The CCRC's decision on Potential Candidate's appeal shall be final.

## **J. NOTIFICATION OF ELIGIBLE CANDIDATES**

The CCRC shall release the list of Eligible Candidates on the Notification Date *in the year prior* to the year in which the Eligible Candidate's election will be held.

## **K. CAMPAIGN RULES FOR ELIGIBLE CANDIDATES**

As part of the NAR Application for Elected Office, Potential Candidates are required to sign an acknowledgement that they have read, understand and agree to comply with the NAR's campaign and election rules.

Eligible Candidates\* must abide by the following campaign rules:

- 1) Eligible Candidates may not begin campaigning for elected office until the date upon which they are identified as an Eligible Candidate.
- 2) Eligible Candidates may not solicit or accept endorsements or any type of campaign involvement or financial support from members of the CCRC or NAR's Leadership Team.
- 3) Eligible Candidates shall make best efforts to remediate any campaign violation committed by a member of their campaign team.
- 4) Eligible Candidates may not campaign at, or in the physical vicinity of, any NAR Board of Directors meeting.
- 5) All displayed campaign materials must be removed from all public spaces by no later than 8:00 p.m. the night before an NAR Board of Directors meeting.
- 6) Eligible Candidates may only hold campaign events or display campaign materials at the NAR November meeting and NAR May meeting. For purposes of clarification, this rule does not prohibit an Eligible Candidate from campaigning at regional conferences or state association meetings.

- 7) Eligible Candidates must submit all campaign materials to NAR's Office of General Counsel for advance review and approval prior to their use.
- 8) All campaign materials must contain truthful and accurate information.
- 9) Eligible Candidates may not imply having received support or endorsement from NAR, an Elected Officer, an NAR Vice President or a CCRC member.
- 10) All campaign materials must accurately specify the office and year for which the Eligible Candidate is running for election.
- 11) Must comply with NAR rules and policies for displaying or distributing campaign materials at the NAR November and May national meetings.
- 12) No campaign materials may be delivered to a Member's hotel room.

\*For purposes of these rules, Eligible Candidate shall mean the Eligible Candidate or any member of the Eligible Candidate's campaign team.

## **L. CAMPAIGN RULE VIOLATION COMPLAINT PROCESS, SANCTIONS AND APPEAL PROCESS**

If an Interested Member, Potential Candidate, or Eligible Candidate has a good faith belief that an NAR campaign rule violation has occurred, such candidate is encouraged to first contact the allegedly offending candidate, or a representative of that candidate's campaign team, in order to attempt to resolve the issue. If such attempt to resolve the matter is unsuccessful, an Interested Member, Potential Candidate, or Eligible Candidate may file a complaint with the Chair of the CCRC pursuant to the procedure outlined below.

If a Member has a good faith belief that an NAR campaign rule violation has occurred, such Member may file a written complaint with the Chair of the CCRC. In addition, the CCRC may also initiate a complaint for a suspected campaign violation.

### **1. Process for Submitting a Complaint:**

- a. Written complaints must be filed with the Chair of the CCRC.  
All complaints must contain the name of the complainant, the date the complaint was received, and a summary of the allegations. Anonymous

complaints are prohibited. The Chair of the CCRC, in consultation with NAR's General Counsel, will review the complaint to determine whether the complaint alleges a valid basis for a campaign violation. If it appears a violation may have occurred, a group consisting of the Chair or his/her designee, in collaboration with NAR's General Counsel and one member of the CAWG, as selected and mutually agreed to by the Chair and NAR's General Counsel, will: 1) contact the respondent directly and attempt to resolve the matter in a mutually agreeable manner, which may include the imposition of a sanction; and if the matter is not resolved 2) the Chair, or his/her designee, may assemble a five-member panel consisting of members of the CCRC to investigate and consider the matter.

- b. If a panel is assembled, the panel may request the complainant and/or respondent to provide additional information, or appear before the panel in person or remotely. The panel is not bound by the rules of evidence and may consider any evidence in an attempt to determine whether a campaign violation has occurred. The Chair of the CCRC, or his/her designee, will chair the panel.
- c. The Chair, in consultation with NAR's General Counsel, will document the resolution of the matter and communicate such resolution to the appropriate parties. There is no automatic obligation to communicate the panel's decision to the complainant.
- d. If the respondent wishes to appeal the sanction or the panel's decision for any reason, an appeal may be filed with the Chair of the CCRC. Complainants have no appeal right.

2. **Sanctions**: If a campaign violation is deemed to have been committed, the panel may impose any one or more of the following sanctions:

- Confidential written warning to the candidate, with a copy to the candidate's campaign manager and the candidate's home state association's chief executive officer.
- Confidential cease and desist letter to the candidate, with a copy to the candidate's campaign manager and candidate's home state association's chief executive officer.

- Confidential letter of censure to the candidate, with a copy to the candidate's campaign manager, the candidate's home state association's chief executive officer, and home state officers.
- Confidential letter of censure to the candidate, with a copy to the candidate's campaign manager, the Regional Vice President of the candidate's region, and each state president and state association's chief executive officer within the candidate's region.
- Public letter of censure read at the next Candidate Forum.
- Letter of censure delivered to the NAR Board of Directors.
- Prohibition from running for NAR Elected Office during the current and immediately following election cycle.

### 3. **Appeal Process**

- a. Within five (5) business days of the candidate's receipt of notice of the panel's decision, a candidate may file a written appeal, which shall include information supporting the basis of the appeal.
- b. The Chair will notify the candidate of the date and time for the appeal hearing within three (3) business days of receiving the candidate's appeal.
- c. The candidate shall have the right to present their appeal to the full CCRC. Members of the CCRC who served as part of the original review panel are excluded for purposes of the appeal and the CCRC Chair shall preside over the proceeding, but shall be a nonvoting member. The candidate shall have the right to present any relevant evidence to the CCRC for up to thirty (30) minutes.
- d. The CCRC will act as if it's considering the complaint for the first time, affording no deference to the five-member panel's previous decision.
- e. Within five (5) days of the appeal hearing, the Chair shall notify the candidate of the CCRC's decision on the appeal.
- f. The CCRC's decision is final.

## **M. ELECTION AND INSTALLATION OF OFFICERS**

1. **NAR May Meetings:** The NAR Board of Directors elects the President-Elect, First Vice President, Treasurer and Regional Vice Presidents by a majority vote at the NAR May Meeting. The Eligible Candidate receiving a majority vote shall be declared the winner; and if no Eligible Candidate on the ballot receives a majority vote, then the two Eligible Candidates receiving the greatest number of votes shall remain on the ballot and a run-off election shall be held as between those two Eligible Candidates.

NAR's election process shall provide a system for voting by secret ballot whenever there is more than one Eligible Candidate running for a particular office. After the election is held, all voting record files will be promptly destroyed.

2. **NAR November Meetings:** The NAR President, President-Elect, First Vice President, Treasurer and Regional Vice Presidents will be installed into office during the inaugural banquet at NAR's Annual Convention.

## **N. CREDENTIALS AND CAMPAIGN RULES COMMITTEE**

**Purpose:** To determine candidate eligibility for all NAR elected offices and to establish, monitor and enforce campaign and election rules, and preside over any appeals.

**Composition:** Eighteen (18) members as follows:

- Chair (who shall be the Past President twice removed)
- The Immediate Past Chair
- The Immediate Past President

- Two (2) past presidents as outlined by the Kniskern Formula (formula determined by the Past Presidents' Advisory Committee):

**KNISKERN FORMULA FOR PAST PRESIDENT REPRESENTATION**  
(AS AMENDED NOVEMBER 1981)

1st Year Out of Office	Ex-Officio
2nd Year Out of Office	Chair
4th Year Out of Office	Member of Committee
6th Year Out of Office	Member of Committee
9th Year Out of Office	1 <sup>st</sup> Alternate
14th Year Out of Office	2 <sup>nd</sup> Alternate

- Thirteen (13) members, as appointed by the NAR President, from each Region, provided such person has not served on the CCRC during the year preceding the year of appointment, and has served either as a Regional Vice President during the preceding five years or as a NAR director during at least two of the preceding five years.

**Responsibilities:**

1. In the event the Chair is unable to serve, his/her most recent and available predecessor shall serve as the Chair.
2. The Chair, in advance of the meetings of the CCRC, is responsible for advising its members of significant communications that come to their attention, and preparing correspondence on behalf of the CCRC.
3. Members of the CCRC represent Members' interests and should not make any decisions based on the influence of personal commitments.
4. Members of the CCRC must abide by the Endorsement Guidelines outlined in Section C of this manual.
5. All committee deliberations should be held in strict confidence.
6. Logistics for the meetings of the committee is an administrative function of NAR, under the supervision of the CEO.
7. Sessions of the CCRC, being of a confidential nature, are closed, except to delegations appearing at the pleasure of the CCRC.

8. Members of the CCRC will establish a consistent format for the Candidates' Forum held at the NAR May and November meetings.
9. Members of the CCRC will establish a consistent format for and schedule two (2) campaign webinars between August 1 of the year before the Eligible Candidate's election will be held and the NAR May Meetings.
10. The CCRC shall hold a conference call with Eligible Candidates following the Notification Date, and prior to each of NAR's national meetings.
11. The CCRC shall submit the notification of Eligible Candidates to the NAR Board of Directors.

## **O. CANDIDATE AUDIT WORK GROUP**

**Purpose:** To review candidate applications, review financial audit and legal audits, and to make a determination as to whether a Potential Candidate is eligible to run for NAR office.

**Composition:** CCRC Chair, the Immediate Past President, and three regional representatives selected in a random rotation.

**Responsibilities:**

1. The CAWG may hold such meetings as it deems necessary.
2. The CAWG shall review the application and the evaluation of the financial audit, legal audit and criminal background check for each Potential Candidate for President-Elect, First Vice President, Treasurer and Regional Vice President.
3. The CAWG shall submit a report on the Potential Candidates to the CCRC.

## **P. CAMPAIGN ENDORSEMENT POLICIES FOR CCRC MEMBERS**

Membership on the CCRC carries with it certain duties and obligations. NAR's Constitution prohibits members of the CCRC from publicly endorsing any candidate. The prohibition means that members of the CCRC:

- Can attend events but cannot introduce or speak on behalf of a candidate or participate in photo opportunities with candidates. If events are attended, an effort

should be made to attend events of all candidates so that there is no appearance of favoritism.

- Cannot wear or distribute campaign paraphernalia.
- May view information on candidates' websites and social media platforms, but must refrain from taking any action that could be construed as an endorsement (e.g. "liking" a candidate's campaign facebook page).
- May not serve on a candidate's advisory or campaign committee once appointed to the CCRC.
- Must abstain from voting on any candidate endorsement taking place in the member's home state or region once appointed to the CCRC.
- If it comes to the attention of the Chair of the CCRC that a member of the CCRC has violated the Campaign Endorsement Policies, the Chair, in consultation with NAR's General Counsel, shall address the alleged violation and determine an appropriate resolution of the violation.

## **Q. NAR ELECTED POSITIONS: DESIRED QUALIFICATIONS**

### **1. Office of President, President-Elect and First Vice President**

- a. Leadership qualities and ability to achieve the mission of the Organization
  - Candidate is aligned with NAR's mission statement.
  - Candidate has leadership ability to move the agenda and vision of NAR with his/her own style and talent to mobilize the state and local associations.
  - Candidate exercises personal leadership in the motivation of other REALTORS<sup>®</sup>, i.e., officers, state and local association members, committee members, and membership.
  - Candidate is open to new ideas and concepts even when taking a new direction may involve risk-taking.
  - Candidate has personal leadership capabilities to influence the establishment of goals and objectives of NAR; candidate is persistent in carrying forth ideas and directions that may be unpopular to some.

- Candidate possesses presentation skills and presence to serve as chief spokesperson and leader; ability to monitor and evaluate NAR's performance and effectiveness.
  - Candidate possesses a knowledge and understanding of the NAR's programs and initiatives and is able to counsel the NAR's governing bodies regarding its programs, policies, priorities, objectives, goals and organizational structures.
  - Candidate is able to set up alternative management of his/her real estate business to allow the candidate to commit the enormous amount of time and energy to the Office.
  - Candidate will represent the members' interests.
- b. Experience within the REALTOR<sup>®</sup> organization
- Candidate should have served in some of the following capacities:
    - Service as an NAR director.
    - Service as chairman of NAR committee(s).
    - Service as Regional Vice President.
    - Service on NAR Executive Committee.
    - Service on NAR Strategic Planning Committee.
    - Service in other NAR position.
    - Service as state president.
    - Service as board president.
    - Service as leader in Affiliate organization.

## **2. Office of Treasurer**

- a. Leadership Qualities and Ability to Oversee the Assets and Obligations of the Organization
- Candidate is aligned with the NAR's mission statement.
  - Candidate exercises personal leadership in the motivation of other REALTORS<sup>®</sup>, i.e. officers, state and local association members, committee members, and membership.

- Candidate has personal leadership capabilities to influence the establishment of goals and objectives of NAR; candidate is persistent in carrying forth ideas and directions that may be unpopular to some.
  - Candidate demonstrates the ability to think strategically and/or operationally depending on the business issue at hand.
  - Candidate has thorough experience in reviewing and interpreting financial statements, analyzing investment opportunities, and implementing budgeting processes in the management of a business organization.
  - Candidate must be interested in, willing and available to be immersed in the budgeting and financial oversight of the financial management of NAR.
  - Candidate possesses presentation skills and presence to serve as manager of NAR's assets.
  - Candidate possesses a knowledge and understanding of NAR's programs and initiatives.
  - Candidate is able to set up alternative management of his/her real estate business to allow the candidate to commit the enormous amount of time and energy to the Office.
- b. Experience within the REALTOR<sup>®</sup> organization
- Candidate should have served in some of the following capacities:
  - Service on the NAR Finance Committee.
  - Service as an NAR director.
  - Service as chairman of NAR committee(s).
  - Service as Regional Vice President.
  - Service on NAR Executive Committee.
  - Service on NAR Strategic Planning Committee.
  - Service in other NAR position.
  - Service as state president.
  - Service as board president.
  - Service as state treasurer.
  - Service as board treasurer.
  - Service as leader in Affiliate organization.

### 3. Regional Vice President

- a. The RVP candidate should have broad leadership experience from their board and state association and should have served as state president.
- b. The RVP candidate should have served as a NAR director which may include the year as a director when serving as state president.
- c. The RVP candidate should have served as a member of a NAR committee other than a state forum.
- d. The RVP candidate should have other REALTOR<sup>®</sup>, civic and governmental activity and experience as would indicate leadership ability and potential.

## R. NAR ELECTED OFFICES: FUNCTIONS, DUTIES, RESPONSIBILITIES AND AUTHORITY

### 1. President

#### a. Basic Functions

- The President shall serve as Chief Elected Officer, representing the entire membership and the best interests of NAR, the states, boards, and affiliated Institutes, Societies and Councils.
- Exercises personal leadership in the motivation of other officers, board members, committee members, and membership.
- Influences the establishment of goals and objectives for NAR during term of office.
- Acts as chief spokesperson and leader and takes an important part in monitoring and evaluating NAR performance and effectiveness.
- Encourages coordination of programs within NAR family -- states, boards, and affiliated Institutes, Societies and Councils.
- Establishes, develops, and maintains relationships with other individuals, groups, and associations outside NAR's membership for the mutual benefit of the land and housing industry.

- The Chief Executive Officer is subject to his oversight and direction, and through him, the entire NAR staff.

b. **Duties, Responsibilities and Authority**

Within the limits of the Constitution, Bylaws, policies, and priorities of the NAR Board of Directors, the Chief Elected Officer is responsible and has commensurate authority to accomplish the duties as set forth below:

- Speaks for NAR in stating and interpreting NAR policy to the press, the public, legislative bodies, and other organizations.
- Advocates public policy favorable to the real estate industry and our members' rights to achieve their professional and civic objectives.
- Attends meetings of the states, and on some occasions boards, to encourage increased participation in NAR activities and solicit comments on the effectiveness of NAR in serving its members.
- Promotes active participation in NAR at all levels and in all professional areas.
- Presides at meetings of the Delegate Body, the Board of Directors, and the Executive Committee.
- Informs the Delegate Body, Board of Directors, Executive Committee, and other NAR Officers on the conditions and operations of NAR.
- Appoints committee chairs of NAR committees and task forces; outlines the purpose and duties of these committees and monitors progress, with the assistance of the Vice Presidents, who are appointed by the President.
- Gives counsel to the legislative bodies -- Executive Committee, Board of Directors, and Delegate Body - in the review of priorities, programs, policies, objectives, goals, and organizational structures.
- Supports and defends policies and programs adopted by the Delegate Body, Board of Directors and Executive Committee.
- Reports NAR's condition and progress to Members and leaders.
- Nurtures coalitions with other industry organizations and professional associations with common objectives.

- Coordinates the affiliated Institutes, Societies and Councils to eliminate overlap, achieve efficiency, and better serve Members.
- Oversees development of the budget for his/her elective year.
- Recommends changes in priorities and resource allocation to the Executive Committee and Board of Directors and monitors the financial conditions of NAR.
- Oversees the performance of the Chief Executive Officer to insure that the priorities, programs, objectives and goals of NAR are accomplished within the policies established by the Board of Directors.

## 2. President-Elect

### a. **Basic Functions**

- The President – Elect is second to the President in leadership and as a spokesperson.
- Develops and cultivates, on behalf of the President, productive relations with local, state and regional REALTOR<sup>®</sup> leaders and the affiliates of NAR.
- Recommends to the President changes in priorities and programs and resource use.

### b. **Duties, Responsibilities and Authority**

- Fulfills the responsibilities of the President in the absence of the President.
- Supports and defends policies and programs adopted by the Board of Directors and Executive Committee.
- Promotes active participation in NAR on the part of the membership.
- Confers with the state and board leadership to develop and achieve annual goals and objectives as they relate to the long-range plans of NAR.
- Represents NAR at state and board meetings and conventions as assigned.
- Participates with the President at meetings with shelter industry groups and other coalitions, franchises, and referral organizations.

### 3. First Vice President

#### a. **Basic Functions**

- The First Vice President is third to the President in leadership and as a spokesperson.
- Develops and cultivates on behalf of the President productive relationships with the affiliates of NAR.
- Participates most actively with the development of the Strategic Plan and provides ongoing counsel to the Strategic Thinking Advisory Committee.

#### b. **Duties, Responsibilities and Authority**

- Fulfills the responsibilities of the President in the absence of the President and President-Elect.
- Serves as the chair at meetings of the Regional Vice Presidents as designated by the President.
- Supports and defends policies and programs adopted by the Board of Directors and Executive Committee.
- Promotes active participation in NAR on the part of the membership.
- Represents NAR at state and board meetings and conventions as assigned.

### 4. Treasurer

#### a. **Basic Functions**

- The Treasurer serves as custodian of the funds and disbursing agent for NAR and its affiliated Institutes, Societies and Councils.
- Influences the establishment of goals and objectives relating to the financial management of NAR during the term of office.
- Acts as chief financial spokesperson. Recommends to the President changes in priorities to programs and resource use.

#### b. **Duties, Responsibilities and Authority**

- Serves as chair of the Finance Committee.

- Works with the Budget Review Process to develop the NAR's objectives specifically of a financial nature.
- Promotes active participation in the NAR on the part of membership.
- Represents the NAR at state and board meetings and conventions as assigned.
- Provides oversight in the financial administration of NAR and its affiliated Institutes, Societies and Councils.
- Treasurer shall be responsible for the deposit of funds and securities in such depositories and in such manner as the Board of Directors may designate.
- Assists President in developing the budget during his/her year.
- Works with the Executive Vice President in understanding and communicating the importance of NAR's human resource assets.

## 5. Regional Vice President

### a. **Basic Functions**

The Regional Vice President is an Officer of the National Association of REALTORS®. In their respective region, an RVP serves as a representative of NAR to identify problems or opportunities within the region and acts as a representative of the President in such matters as may be assigned by the President.

### b. **Duties, Responsibilities and Authority**

- Raise members' awareness of the content and importance of NAR programs and policies in their region.
- Serve as spokesperson for NAR within the region and as a coordinator in solving problems at the various levels.
- Work with the state association and board presidents and executive officers to stimulate a team effort throughout the year.
- Attend state association leadership conference (as a nominee), regional conferences (if applicable) and/or annual convention, when possible, to improve understanding, cooperation, and two-way communication.

- Attend the annual NAR meetings and chair their regional caucus meeting to conduct regional business affairs and exchange information.
- Serve as a voting member of the Executive Committee.
- Oversee the work of NAR in their respective regions and act as the representative of the President in such matters as may be assigned to them.