

# Sustainability Self-Assessment For State & Local Associations

This self-assessment focuses on identifying your association's position within three main categories: **your capacity, your challenges, and your priorities.**

These categories are designed to help you determine where to best focus your association's time and energy to solve the problems most urgent, accessible, and important to **your** organization within the unique context of your market's geographic location.

Review the assessment questions below carefully and select the option(s) that best aligns with your association. In some instances, multiple options may best describe your situation, feel free to note these where relevant.

## IDENTIFYING YOUR CAPACITY:

**1. How would you describe your association's internal sustainability structure?** This could include dedicated staff, specific committee structure in place, PAG, or another workgroup focused on the subject.

- a. Our association has no internal sustainability-focused staff or structure for members.
- b. Our association has at least one staff person who can consider sustainability topics with their other responsibilities.
- c. Our association has at least one staff person who works solely or primarily on sustainability topics.
- d. Our association has staff *and* a committee or task force related to sustainability, climate, resilience, or the environment.
- e. Our association has, or plans to begin, a committee, task force, work group, or other member participation on sustainability topics.

**2. How would you describe your association's access to internal sustainability and resiliency content experts that may be able to engage members on the subject matter?** Do you have member-leaders, staff advocates, niche professionals? These experts may be equipped to speak to sustainability topics such as physical assets, (building) enhancements and retrofits, culture, etc.

- a. We have neither staff nor volunteers with subject knowledge to engage members on sustainability.
- b. We have adequate volunteers with subject knowledge to engage members but are limited on staff to support them.
- c. We have adequate staff but lack volunteers with subject knowledge to engage members on sustainability.

- d. We have staff and volunteers with subject knowledge willing and able to engage members on sustainability.
- e. We are unsure and would need to investigate further to provide an accurate assessment.

**3. How would you describe your relationships with external partners or stakeholders involving sustainability and resilience related topics?** Examples may include environmental non-profits, utility companies, universities and other educational entities, policy centers, content experts, renewable energy experts and contractors, high efficiency housing experts, green appraisals, etc.

- a. We are not aware of and have no existing partnerships aimed at addressing these topics.
- b. We know of, but have yet to engage with, external groups who work on and/or address this subject matter.
- c. We have begun partnerships with external groups but are unsure how best to focus this effort to provide maximum value to our members.
- d. We do partner with external groups and actively engage with them on a semi-regular basis to address local sustainability and resiliency related concerns or opportunities.

**4. Within your association, including staff and volunteer leadership, how best would you describe the awareness of or interest towards sustainability and climate resilience subjects?** Consider community

engagements, member requests for education or resources, local sentiment on the subject or sense of urgency, current integration throughout the organization or day to day operations, etc.

- a. Most staff and/or membership are not receptive to sustainability topics and are disengaged with the subject matter.
- b. Many staff/members can see a relationship between sustainability and the built environment but do not feel it is within their interest, or responsibility, to help address it.
- c. Many staff/members are receptive to sustainability in the built environment but are unsure how to engage with, or address it, as real estate professionals.
- d. Many/most of the staff and/or members understand sustainability and are active in supporting sustainability strategy in real estate.
- e. Most members and staff prioritize sustainability as a business and industry strategy.

## **5. How would you describe the existing sustainability features and/or health and wellness offerings for members and association staff in and around your association office?**

Consider any operational efficiency improvements, clean energy sources, community wellness programs, physical and/or mental health support resources, etc.

- a. Our association office needs improvements, but we have a low capacity to offer these improvements or health and wellness resources to members and staff.
- b. Our office has made some improvements and/or programs, but we want to improve efficiency and offer more resources for members and staff.
- c. We have implemented or identified areas to increase efficiency and opportunities for members and staff but need additional support to take on larger projects.
- d. We have made numerous operational improvements to the office and/or have a robust array of health and wellness offerings for members and staff.

## **6. How would you describe your associations' advocacy involvement, influence, or engagement in local or state sustainability and resiliency related legislation?**

Consider: Do your governing bodies regard your association as a resource and partner in addressing climate-change related issues? Has your advocacy committee and/or staff developed policy around the subject? Are you struggling balancing proactive sustainability efforts with private property rights concerns? Is your community facing challenges related to climate equity?

- a. We do not engage in advocacy around sustainability or resiliency-related legislation and do not currently have plans to do so in the future.
- b. We do not currently, but plan to begin addressing these issues at our association in legislative routes in the future.
- c. We are currently or will be advocating for policy/legislation that addresses sustainability and resiliency related issues but would benefit from resources and support to strengthen our efforts.
- d. We have an advocacy committee and/or staff that develops policy around the subject and effectively coordinates or communicates our community interests to governing bodies and our membership.
- e. I am unsure and will need to investigate further to provide an accurate assessment.

## 7. In which ways does your association provide member education, engagement, and awareness on sustainability or resilience-related subject matter? Select all that apply.

If you do not currently address sustainability themes/content, consider how you work to increase awareness and understanding of similar topics. Evaluate which provide the greatest return on investment and those which you may wish to replicate with sustainability.

- a. Classes/Continuing Education Courses
- b. Conferences/Summits/Showcases/etc.
- c. One-off/Casual/Networking Events
- d. Volunteer opportunities
- e. Community and/or Office Building Programs/Retrofits/Improvements
- f. Newsletters/Fact Sheets/Association Produced Education Materials
- g. NAR resources or education
- h. Partnerships
- i. Advocacy
- j. None of the above
- k. Other:

## IDENTIFYING YOUR CHALLENGES:

### 8. How would you describe your typical member's knowledge and understanding of technical or specific aspects of sustainability and resiliency?

For example: Do they understand building science or high-performance systems? Is your typical member aware of financing opportunities supporting sustainable home-improvements?

- a. General knowledge of this subject matter is limited.
- b. General knowledge is low and broad. Members demonstrate a basic understanding of some mainstream offerings such as energy efficient technologies, but not features or opportunities that may require more specific research or training.
- c. General knowledge is moderate, but unspecific and members do not feel equipped to support recommendations to clients with research-backed tools.
- d. General knowledge is high and specific, as members feel equipped with a wealth of resources to provide support and recommendations to clients.
- e. I am unsure and will need to investigate this further to provide an accurate assessment.

## **9. How would you describe your association's awareness and sense of urgency to address the impact of extreme weather events and your market's resiliency?**

Consider your association in the context of the larger community you serve. What type of events are they facing? Wildfire, drought, hurricanes? How urgent or severe do they feel? Engagement examples could include education, clean-up events, conferences, member relief funds, research, crisis & recovery planning, etc.

- a. Our association/membership has limited or no concern for the impact of climate-change related events on housing in our area.
- b. Our association/membership has some concern for these events, but do not currently feel a need to engage or address them.
- c. Our association/membership is moderately concerned with the impact of these events and is at least somewhat interested in engaging with or addressing them.
- d. Our association/membership is very concerned with the impact these events have/will have in our area and see a growing need for resources or action on these impacts.

## **10. How would you describe your association's understanding and utilization of 'green data' or local MLSs 'green fields'?**

Consider: Do you know if you have specific energy ratings fields? Does your data match green appraisal guidelines? Do you offer utility information and does that aggregate into a total-cost-of-housing metric? Do you partner with any 3<sup>rd</sup> party energy score company? Are there other related technology offerings that your MLS offers your membership related to housing efficiency, climate risk, etc.?

- a. Our MLS does not include these fields.
- b. Our MLS has access to green MLS fields, but they have not been pushed to the user.
- c. Our MLS has access to green MLS fields, and they have been pushed to the user, but are either not utilized, misused, or underutilized.
- d. Our MLS has access to green MLS fields, and they have been pushed to the user and are utilized by members.
- e. I am unsure and will need to investigate this further to provide an accurate assessment.

## **11. How would you describe your local and state governing authorities and legislative bodies' perception of or engagement on climate, sustainability, and resiliency related issues?**

For example, is your legislature/governing authorities proactively engaging legislatively on the topic? Actively disengaged? Consider that your state and local bodies may take different approaches and the impact this may have on your association and local housing market.

- a. Both the local and state levels generally support and address climate, sustainability, and resiliency related issues as such.
- b. Only the local level generally supports action on these topics, the state level is generally against acting in a proactive nature to these issues.
- c. The local level generally supports positive action for these issues, and the state level is relatively neutral or not as relevant to addressing the local challenges.
- d. Neither the state or local levels are particularly engaged with this subject matter, or they take a generally neutral stance on climate, sustainability, and resilience related issues.
- e. The local level is generally against engaging with these issues, and the state level is relatively neutral or less relevant to local challenges.
- f. The local level is generally against engaging in these issues, while the state level generally supports engaging these issues in a proactive nature.
- g. Both the local and state levels are generally against engaging with climate, sustainability, and resilience related issues as such.

**12. Are there any other issues specific to your marketplace that come to mind and should be considered when assessing your association’s need for sustainability and resiliency strategies?** Examples may include insurance issues, zoning constraints, resource scarcities, regulatory timelines, etc.

Free Response Exercise

## IDENTIFYING YOUR PRIORITIES:

Think back to the categories of people, planet, profit, and property. Consider your answers to the questions above, your capacities and your challenges, and how they may fit together within these categories. Which stands out as the most pressing to address at your association?

For example, does your association need to reduce operational costs? Do you want to build a network within your larger community to support increased energy efficiency in housing? Do you want to help homeowners safeguard themselves and their properties from increasingly severe extreme weather?

Not every item will be an immediate priority. Some may warrant immediate action, some in the next 3-5 years and some may develop into longer-term goals. Take a moment to identify your priorities and then move to the next section of the toolkit to explore actionable recommendations to pursue each of these goals.