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| 1. Governance, Planning, and Organizational Operations |
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| **1-1** | **Which statement most closely reflects the volunteer leadership's organizational focus in your association:** |
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| **Current**  | **Future**  |   |
|  |  | Staff members assist volunteer leaders in determining strategic vision; staff develops goals and plans to implement the vision |
|  |  | Volunteer leaders determine strategic vision, direct staff in developing goals, and monitor implementation |
|  |  | Volunteer leaders determine the goals, and play a primary role in implementing the goals |
|  |  | Does not apply to my association |

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| **1-2** | **Which statement most closely represents the decision-making process within your association:**  |
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| **Current**  | **Future**  |   |
|  |  | The board of directors makes decisions regarding strategic objectives; staff has the authority to make most operational decisions within defined parameters |
|  |  | The board of directors makes decisions regarding operational procedures |
|  |  | Staff leaders and the board of directors share decision-making authority for organizational vision and strategic outcomes; the chief staff executive determines operational procedures |
|  |  | Does not apply to my association |

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| **1-3** | **Which statement most closely represents the committee structure of your association:** |
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| **Current**  | **Future**  |   |
|  |  | Committee structure is based on established goals and objectives, with little change from year to year; staff provides administrative support to committees |
|  |  | Committee structure is based on strategic goals and changes from year to year; staff develops a committee implementation plan and staff liaisons participate on each committee |
|  |  | Committee operations are administered and supported predominantly by volunteer leaders, with some assistance from staff  |
|  |  | Does not apply to my association |

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| **1-4** | **Which statement most closely reflects how governing documents, policies and procedures are developed and managed in your association:** |
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| **Current**  | **Future**  |   |
|  |  | Association adopts policies to ensure fiscal integrity of financial operations; governing documents and policies are updated on a regular basis by staff to reflect changes in the association's mission and goals, while reducing liability |
|  |  | Association adopts policies to ensure the fiscal integrity of financial operations; governing documents and policies are flexible enough to allow the association to respond effectively to changing market conditions |
|  |  | Association adopts polices to ensure the fiscal integrity of financial operations; governing documents and policies are based on NAR model bylaws and are largely intended to protect the association from liability |

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| **1-5** | **Which statement most closely reflects strategic planning efforts in your association:** |
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| **Current**  | **Future**  |   |
|  |  | Association annually adopts a business or strategic plan that includes an advocacy and consumer outreach component; budget is closely tied to the plan; strategic goals can be modified to accommodate changes in economic conditions |
|  |  | Association annually adopts a business or strategic plan that includes an advocacy, and consumer outreach component |
|  |  | Association annually adopts a business or strategic plan that includes an advocacy and consumer outreach component; budget is closely tied to the plan |

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| **1-6** | **Which statement most closely reflects your association's physical location:** |
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| **Current**  | **Future**  |   |
|  |  | Dedicated office location with classroom/training facilities and meeting rooms, with office equipment updated as needed  |
|  |  | Office location with basic office equipment (telephone, fax, copier, scanner, computer with online access); small classroom or no classroom; OR No office location; space is rented when a meeting need arises |
|  |  | Dedicated association office (or offices) with training/education facilities and meeting rooms, retail store, and office equipment and technological resources for trends and analysis/research, etc. |
|  |  | Does not apply to my association |

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| **1-7** | **Which statement most closely represents your association's technology resources:** |
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| **Current**  | **Future**  |   |
|  |  | Association maintains an interactive website, as specified by the Core Standards; regularly upgrades equipment and technology services as needed; may employ IT staff supplemented by outside resources and vendors |
|  |  | Association maintains an interactive website, as specified by the Core Standards; relies on outside resources to help choose and implement technology |
|  |  | Association maintains an interactive website, as specified by the Core Standards; researches, develops and invests in equipment and services for association members as well as the association itself; employs IT staff and implements leading-edge technology |

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| **1-8** | **Which statement most closely reflects your association's budgeting process:** |
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| **Current**  | **Future**  |   |
|  |  | Budget is developed by staff with input and approval by volunteer leadership; adjustments to the budget are recommended by staff and approved by the leadership |
|  |  | Budget is developed by volunteer leaders with input from staff; budget adjustments are recommended by the volunteer leadership and implemented by staff; unbudgeted new initiatives are not usually considered |
|  |  | Budget is developed by staff based on strategic/business plan with approval by volunteer leadership; staff is empowered to make adjustments within established guidelines and act quickly on opportunities, threats, or new initiatives |
|  |  | Does not apply to my association |

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| **1-9** | **Which statement most closely represents your association's reserves:** |
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| **Current**  | **Future**  |   |
|  |  | Financial reserves are maintained in keeping with an association investment policy; staff and an outside firm recommend investment decisions, which are approved by volunteer leadership. |
|  |  | Financial reserves are maintained and actively managed; investment decisions are recommended and approved by volunteer leadership, with input from an outside investment firm |
|  |  | Basic level of financial reserves are available to support current association operations |
|  |  | Does not apply to my association |

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| **1-10** | **Which statement most closely represents your association's non-dues revenue income:** |
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| **Current**  | **Future**  |   |
|  |  | The association’s services are supported predominantly by dues with minimal non-dues revenue from programs such as education and events; non-dues revenue comes only from association members |
|  |  | The association has a significant stream of non-dues revenue from programs and services, as well as separate corporations, business entities; non-dues revenue is used primarily for reserves; the source for generating non-dues revenue goes beyond the REALTOR® community |
|  |  | The association derives non-dues revenue from services other than core programs; non-dues revenue is used to fund operations, core services and additional programs for members; non-dues income includes revenue from neighboring associations’ members |
|  |  | Does not apply to my association |

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| **1-11** | **Which statement most closely represents your association's responsiveness to disaster planning:** |
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| **Current**  | **Future**  |   |
|  |  | A comprehensive crisis communications and management plan is in place that lays out a plan for potential crisis, including communications with the media, and community outreach |
|  |  | There is no written plan for communicating in a disaster; however, the association leadership and staff understand how to respond, and back-up systems are in place to recover membership and financial records |
|  |  | A written communications plan is in place for responding to natural disasters and crisis situations |
|  |  | Does not apply to my association |

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| 2. Staff Competencies |
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| **2-1** | **Which statement most closely reflects your association's staff structure?** |
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| **Current**  | **Future**  |   |
|  |  | A chief staff executive is responsible for the association’s senior management team and other employees. Staff members are responsible for administration and management of the association |
|  |  | The association employs a manager/administrator who may employ other full- or part-time staff members or outsource certain functions |
|  |  | The association employs an administrator with general office management skills, and relies on volunteer assistance; may utilize outsourcing |
|  |  | Does not apply to my association |

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| **2-2** | **Which statement most closely represents staff compensation levels:** |
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| **Current**  | **Future**  |   |
|  |  | Compensation is competitive with the local market; employee benefits such as insurance, retirement plan, etc., are limited |
|  |  | Compensation is competitive with the regional market; employee benefits are moderate |
|  |  | Compensation is competitive with the national market; a comprehensive package of employee benefits is offered |
|  |  | Does not apply to my association |

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| **2-3** | **Which statement most closely represents the highest level of staff professional development opportunities:** |
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| **Current**  | **Future**  |   |
|  |  | The chief staff executive completes at least six hours of REALTOR® association professional development annually; professional development opportunities are funded by the association for supervisors and managers |
|  |  | The chief staff executive completes at least six hours of REALTOR® association professional development annually; professional development opportunities may or may not be funded by the associations |
|  |  | The chief staff executive completes at least six hours of REALTOR® association professional development annually; professional development opportunities are funded by the association for all staff |

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| **2-4** | **Which statement most closely represents your association’s human resources capabilities:** |
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| **Current**  | **Future**  |   |
|  |  | Chief staff executive creates, maintains and regularly updates employee manual; adheres to NAR’s employer/employee guidelines; complies with federal, state and local employment laws; responsible for payroll; creates and maintains staff job descriptions; conducts performance evaluations |
|  |  | Human resources staff creates, maintains and updates employee manual; adheres to NAR’s employer/employee guidelines; complies with federal, state and local employment laws; creates and maintains staff job descriptions; administers payroll and employee insurance and benefits programs; responsible for risk assessment, management, and compliance; employee education and training; utilizes tools and resources for employee performance evaluations through effective departmental/supervisory procedures; has a ‘whistle blower’ program in place |
|  |  | Chief staff executive does all of the above – and also develops organizational chart; trains new employees; develops and maintains employee compensation and insurance/benefits program |
|  |  | Does not apply to my association |

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| 3. Member Services |
| **3-1** | **Which statement most closely reflects your association's member communications practices:** |
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| **Current**  | **Future**  |   |
|  |  | Via email and an internet-based means communication is generally targeted to members only – primarily announcements and association information with occasional press releases and other basic media outreach; volunteer leaders are the official spokespersons for the association. |
|  |  | Via email and an internet-based means communications are targeted to internal and external stakeholders, including industry news and trends, as well as association information; association utilizes various communication methods, including social media (i.e. Facebook, etc.) to create social communities to communicate with members and the public; Volunteer leaders and/or CEO act as official spokespersons for the association. |

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| **3-2** | **Which statement most closely represents your association's member recruitment, retention and orientation efforts:** |
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| **Current**  | **Future**  |   |
|  |  | New member recruitment and retention is directed by volunteers, with staff support; new member orientation program largely based on materials from local, state, and national levels; association promotes the value of the REALTOR® organization and the importance of participating in NAR member assessments |
|  |  | New member recruitment and retention program uses innovative outreach and orientation methods; outreach to specific targeted real estate niche groups, potential members from allied industries, and culturally and ethnically diverse groups (i.e. online orientation, new member CD, coordinated office and broker visits, etc.); association promotes the value of the REALTOR® organization and the importance of participating in NAR member |
|  |  | New member recruitment and retention program is managed by staff with volunteer participation; includes one orientation model for all; association promotes the value of the REALTOR® organization and the importance of participating in NAR member |

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| **3-3** | **Which statement most closely represents your association's professional standards administration capabilities to enforce the Code of Ethics:** |
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| **Current**  | **Future**  |   |
|  |  | Professional standards complaints are processed according to established policies and procedures; association provides arbitration and mediation services to members; some services may be available through a cooperative enforcement agreement and/or a shared professional standards administrator |
|  |  | The association is a recognizable leader in professional standards enforcement and certification efforts; provides arbitration and mediation service to other associations via cooperative enforcement agreement; fosters industry-wide ethical standards with other allied real estate groups; promotes and utilizes NAR Dispute Resolution Systems; may offer ombudsman services; may implement a "citation enforcement" policy |
|  |  | The association demonstrates strong skills in professional standards enforcement; staff personnel or certified professional standards administrator provides arbitration and mediation services; participates in service via cooperative enforcement agreement |

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| **3-4** | **Which statement most closely represents education programs offered to members:** |
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| **Current**  | **Future**  |   |
|  |  | The association offers or provides access to education programs, including new and continuing member Code of Ethics training; some are developed by the association and others by outside sources |
|  |  | Education programs, including new and continuing member Code of Ethics training, are developed and offered based on the analysis of current needs and future trends; association utilizes alternative education delivery platforms including online, webinars, and podcasts |
|  |  | A basic schedule of continuing education programs, developed mostly by outside sources, including new and continuing member Code of Ethics training |

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| **3-5** | **Which statement most closely reflects the business/marketing tools and services your association offers to your members?** |
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| **Current**  | **Future**  |   |
|  |  | Innovative marketing tools and other services are developed and offered based on analysis of members’ current and future needs |
|  |  | The association provides access to marketing tools and services developed by outside sources |

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| **3-6** | **Which statement most closely represents how your association responds to industry trends:**  |
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| **Current**  | **Future**  |   |
|  |  | Industry trends are identified jointly by staff and leadership; decision making is a mutual process by volunteers and staff  |
|  |  | Industry trends are identified by either staff or leadership; decision making regarding new strategic initiatives done by staff in coordination with vendors |
|  |  | Industry trends are identified at the state or national level and reviewed by volunteers; volunteer leaders make most decisions about member services and industry initiatives |
|  |  | Does not apply to my association |

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| **3-7** | **Which statement most closely represents the networking opportunities your association offers members:** |
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| **Current**  | **Future**  |   |
|  |  | Networking and social opportunities are planned, organized, and implemented primarily by members through various committees |
|  |  | Networking and social opportunities are planned by staff and volunteers; the goal is member professional development and career success |
|  |  | Networking and social opportunities are implemented by staff with the goal of strategically positioning members for long-term career success, risk reduction and future marketing opportunities |
|  |  | Does not apply to my association |

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| **3-8** | **Which statement most closely represents business specialty/commercial services your association offers your members:** |
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| **Current**  | **Future**  |   |
|  |  | Association encourages interest in specialty areas through committees with staff support; may occasionally offer a course or class on international or commercial real estate |
|  |  | Association promotes specialty classes and designations to members, but relies on others (state and national association) to offer the classes or courses |
|  |  | Specialty councils are established to promote member interest and networking opportunities; events are planned and coordinated by staff with member involvement; guest speakers are invited to general membership events to increase awareness |
|  |  | Does not apply to my association |

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| 4. Internal and External Relations |
| **4-1** | **Which statement most closely represents staff relations in your association:** |
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| **Current**  | **Future**  |   |
|  |  | Chief staff executive is visionary leader for staff members, and does not focus entirely on day-to-day operations; delegates decision-making to senior staff; maintains a succession plan for key staff positions |
|  |  | Chief staff executive handles management functions, while receiving support from other managers; staff members provide clerical support |
|  |  | Chief staff executive administers all day-to-day operations, with support of clerical personnel and outside resources |
|  |  | Does not apply to my association |

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| **4-2** | **Which statement most closely represents volunteer leadership identification and recruitment:** |
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| **Current**  | **Future**  |   |
|  |  | Staff recruits, develops, and nurtures volunteer leaders, with support from leadership, according to a comprehensive leadership development program; staff and volunteers are effective partners |
|  |  | Volunteers recruit association leaders with administrative assistance from staff |
|  |  | Staff and volunteers work together as partners to identify and recruit volunteer leaders |
|  |  | Does not apply to my association |

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| **4-3** | **Which statement most closely represents the role of professional services in your association:** |
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| **Current**  | **Future**  |   |
|  |  | Association engages an accounting firm and attorney only as needed; these professionals are directed by the board of directors; maintains corporate documents, policies, and procedures that conform to local, state, and federal laws and file required reports and documents; association’s with revenue less than $50,000 must obtain an annual compilation and association’s with revenue greater than $50,000 must obtain an annual audit opinion or accountant’s review report |
|  |  | Association engages both a CPA firm and attorney who support the organization’s operations and interact regularly with chief executive and/or accounting staff; CPA and attorney may network with counterparts in other REALTOR® associations; written policy outlines the roles and responsibilities of the appropriate individuals; maintains corporate documents, policies, and procedures that conform to local, state, and federal laws and file required reports and documents; association’s with revenue less than $50,000 must obtain an annual compilation and association’s with revenue greater than $50,000 must obtain an annual audit opinion or accountant’s review report |
|  |  | Association engages a CPA, attorney or both who support association operations; they report to the chief staff executive on a regular basis (such as monthly) but otherwise have relatively limited contact with staff executive and volunteer leadership; maintains corporate documents, policies, and procedures that conform to local, state, and federal laws and file required reports and documents; association’s with revenue less than $50,000 must obtain an annual compilation and association’s with revenue greater than $50,000 must obtain an annual audit opinion or accountant’s review report |

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| **4-4** | **Which statement most closely represents the role of social media in your association:**  |
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| **Current**  | **Future**  |   |
|  |  | Social media is used as a tool for building relationships between staff and the membership; group functions are used to foster communication between committees, task forces and work groups |
|  |  | Social media is used as a tool for developing internal and external relationships with volunteer leaders, members, community members and the news media; specialty groups/pages are created for specific events as well as ongoing communication; social media is an ongoing part of the media/PR program; links and online registration are offered for association events; social media to network with other community leaders |
|  |  | Social media is used as a tool primarily for building staff relationships with limited outreach to membership |
|  |  | Does not apply to my association |

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| **4-5** | **Which statement most closely reflects the association’s relationships in the community:** |
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| **Current**  | **Future**  |   |
|  |  | Engage in four consumer outreach activities from at least three of the four categories in the Consumer Outreach Core Standards; Association volunteer leaders and staff have built effective relationships with local government leaders and legislators, service providers, vendors, consultants, contractors, influential and market share members/industry leaders, media (reporters and editorial writers) and community groups, including political and business coalitions |
|  |  | Engage in four consumer outreach activities from at least three of the four categories in the Consumer Outreach Core Standards; association volunteer leaders foster effective relationships with local government leaders and legislators, service providers/vendors, media |
|  |  | All of the above – plus the association is viewed as a resource for real estate information, market statistics and trend analysis |

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| **4-6** | **Which statement most closely represents your association's public policy capabilities:** |
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| **Current**  | **Future**  |   |
|  |  | Able to inform members regading legal, legislative and regulatory issues |
|  |  | Able to support state and national efforts to affect legal and regulatory issues |
|  |  | Able to analyze, address, and affect legislative and regulatory; develops positions on these issues and successfully enlists the support of members |
|  |  | Does not apply to my association |

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| **4-7** | **Which statement most closely reflects your association’s political action capabilities:** |
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| **Current**  | **Future**  |   |
|  |  | Includes voluntary PAC or Political Action Fund contribution in dues billing (unless prohibited by state law) in order to meet NAR RPAC fundraising goals; informs members of the value of investing in RPAC; possesses a high level of political action expertise; engages in significant fundraising , member mobilization, and candidate development initiatives |
|  |  | Includes voluntary PAC or Political Action Fund contribution in dues billing (unless prohibited by state law) in order to meet NAR RPAC fundraising goals; informs members of the value of investing in RPAC; supports political action fundraising and member mobilization when initiated by the state or national association |
|  |  | Includes voluntary PAC or Political Action Fund contribution in dues billing (unless prohibited by state law) in order to meet NAR RPAC fundraising goals; informs members of the value of investing in RPAC; supports political action fundraising and grassroots mobilization efforts |

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| **4-8** | **Which statement most closely represents government advocacy activities in your association:** |
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| --- | --- | --- |
| **Current**  | **Future**  |   |
|  |  | Effective government advocacy to advance the association’s mission, either directly or as an active coalition participant; participates in state and national Calls for Action; engages in advocacy initiatives as outlined in the My REALTOR® Party Resource Guide; licensees in limited function referral organizations (LFRO) are indentified for participation in Calls for Action |
|  |  | Recognized government advocacy leader in the local community and as partner with the state and/or national association; participates in state and national Calls for Action; engages in advocacy initiatives as outlined in the My REALTOR® Party Resource Guide; licensees in limited function referral organizations (LFRO) are identified for participation in Calls for Action |
|  |  | Supports state and national advocacy efforts with some volunteer involvement on the local level; participates in state and national Calls for Action; engages in advocacy initiatives as outlined in the My REALTOR® Party Resource Guide; licensees in limited function referral organizations (LFRO) are identified for participation in Calls for Action |

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