NAR Organizational Alignment - Core Standards Certification Form

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Mandatory Core Standards for Associations of REALTORS®
Note: State Associations may, at their discretion, request additional documentation from local associations to confirm compliance with the Mandatory Core Standards for Associations of REALTORS®

Save and Return Later --or-- Submit Core Standards Certification form

Section I - CODE OF ETHICS

A. Core Standard: Every association will enforce the new and continuing member Code of Ethics training requirement established in Article IV of the NAR Bylaws.

1. Does the association track member compliance with the requirement of 2.5 hours of training on the REALTOR® Code of Ethics for new and existing members.
○**Yes**○**No**

If no, please explain how member compliance is verified.

B. Core Standard: Every association will maintain a viable professional standards process to enforce the Code of Ethics and provide arbitration and mediation as member services. Associations must have a fully functioning professional standards committee with administrative capability to conduct the program, or must administer professional standards enforcement through a multi-board (or regional) professional standards agreement with other associations or with the state association.

2. Does the association have a professional standards committee?

○**Yes**○**No**

3. Does the association participate in a multi-board (or regional) professional standards agreement with other associations or with the state association?

○**Yes**○**No**

If yes, list the names of the other participating associations

C. Core Standard: Every association will link its website to the Code of Ethics/professional standards (http://www.realtor.org/policy/code-of-ethics-and-professional-standards) resources available online by the NAR and the state association if available. These materials will be available to members and to consumers at the website.

4. Please provide a link to the NAR Code of Ethics/Professional Standards resources on your website:

D. Core Standard: Every association will provide mediation services to members as required by Article IV of the NAR Bylaws. Starting January 1, 2016 every association must offer ombudsman services to members and their clients and customers and may implement a "citation" enforcement policy.

5. Does the association provide mediation as a member service?

○**Yes**○**No**

Please list the name(s) of the association's mediators or explain how mediation services are provided to members and their clients.

6. Does the association offer ombudsman services?

○**Yes**○**No**

Please list the name(s) of the association's ombudspersons or explain how ombudsman services are provided to members and the public.

7. While not required by NAR, does the association utilize a "citation" system of discipline?

○**Yes**○**No**

Section II - ADVOCACY

A. Core Standard:

Note: Funds are to be sent to RPAC or the PAF (individually or collectively by/through the State Association). The intent of this Standard is to provide the best opportunity for every association to meet its goal.

8. Unless prohibited by state law and in recognition of state law differences, each association will include in their dues billing a voluntary investment for RPAC in an amount adequate to meet the NAR RPAC established goal. Please upload a sample dues billing statement. (Note: If you checked either of the first two boxes, proceed to #11)

○**RPAC Dues Billing "above the line" (strongly recommended)**

○**RPAC Dues Billing "below the line"**

○**N/A Selected Question 9 or 10**

Attach Document

9. Associations may instead include in their dues billing a voluntary investment for the Political Advocacy Fund (PAF) in an amount adequate to meet the NAR RPAC established goal. Please upload a sample dues billing statement. (Note: If you checked either of the first two boxes, proceed to #11)

○**PAF Dues Billing "above the line"**

○**PAF Dues Billing "below the line"**

○**N/A Selected 8 or 10**

Attach Document

10. Alternatively, the association can meet the NAR RPAC established goal by other legal means.
The association did not include an RPAC contribution option for members in its dues billing but instead met this requirement by:

○**Corporate contribution in the full amount of the NAR established goal**

○**N/A Selected 8 or 9**

B. Core Standard: Each association will share with its members information and communications from NAR and from the state association, regarding the value of investing in and the benefits received from the individual's participation in RPAC at all three levels (local, state and national).

11. The association met the above requirement by educating and communicating with members about RPAC.

○**Yes**○**No**

If yes, please check the method(s) used to communicate with your membership about RPAC.

☐ **RPAC Brochures/flyers**

☐ **Newsletter (online or print)**

☐ **RPAC on Website**

☐ **RPAC Email Campaigns**

☐ **RPAC presentations at membership meetings**

☐ **RPAC presentations at office meetings**

☐ **Other digital materials**

☐ **Other print materials**

C. Core Standard: Every association will demonstrate significant participation in NAR Calls for Action.

12. Please check the method(s) used to promote participation in NAR Calls for Action, and upload at least one example:

☐ **Promoted on Association Website**

☐ **Promoted in Association newsletter**

☐ **Promoted by separate email**

☐ **Promoted using social media (Facebook, Twitter, etc.)**

☐ **Posted on MLS sign-on page**

☐ **In Person (e.q. Membership Meetings, Sales Meetings, etc.)**

☐ **Delivered via the Realtor® Action Center**

☐ **Other digital materials**

☐ **Other printed materials**

Attach Document

12a Please check if there were no NAR Calls for Action as of the date this certification was completed.

☐ **No NAR Calls for Action**

(Note: State associations can monitor local association participation through the REALTOR® Action Center Response Reports www.realtoractioncenter.com/for-associations/cfa-report/ (http://www.realtoractioncenter.com/for-associations/cfa-report/) .)

D. Core Standard: Every association will demonstrate significant participation (if applicable) in State Calls for Action.

13. Please check the method(s) used to generate participation, and upload at least one example:

☐ **Promoted on Association website**

☐ **Promoted in Association newsletter**

☐ **Promoted by separate email**

☐ **Promoted using social media (Facebook, Twitter, etc.)**

☐ **Posted on MLS sign-on page**

☐ **In Person (e.q. Membership Meetings, Sales Meetings, etc.)**

☐ **Other digital materials**

☐ **Other printed materials**

Attach Document

13a Please check if there were no State Calls to Action as of the date this certification was completed.

☐ **No State Calls to Action**

(Note: State associations will determine the methods used to monitor participation.)

E. Core Standard: Every association must support the REALTOR® Party's "Vote-Act-Invest" goals, and **must annually conduct at least two initiatives or activities furthering or supporting each of those three goals respectively**. Examples of initiatives and activities satisfying this requirement are available in the REALTOR® Party Resource Guide at www.realtoraction center.com/resourceguide.

14. Please check **at least two REALTOR® Party "Vote" initiatives or activities** conducted by the association and attach examples or explanations for each:

☐ **Conducted a candidate independent expenditure campaign**

☐ **Conducted a legislative or advocacy outreach operation**

☐ **Hosted an NAR Candidate Training Academy class**

☐ **Requested and used candidate or issue polling and/or research**

☐ **Conducted an issue mobilization campaign**

☐ **Created a customized, targeted step-up advocacy campaign activity**

☐ **Conducted a REALTOR® voter registration activity**

☐ **Conducted candidate interviews for RPAC contributions or endorsements**

☐ **Conducted a Get Out The Vote (GOTV) program, including publicizing polling places**

☐ **Hosted a Choosing REALTOR® Champions course**

☐ **Other(s) Please explain and/or attach examples**

(Note: You can attach multiple files, one at a time)

Attach Document

(Note: Associations can verify activity, get ideas from other associations, and find information about REALTOR® Party programs by visiting the REALTOR® Party Tracker at www.realtoractioncenter.com/realtor-party/tracker (http://www.realtoractioncenter.com/realtor-party/tracker))

15. Please check **at least two REALTOR® Party "Act" initiatives or activities** conducted by the association and attach examples or explanations for each:

☐ **Submitted comments or had members testify on proposed real estate-related legislation or regulation**

☐ **Used issues polling/research to address a proposed ordinance/law**

☐ **Generated a Call for Action or otherwise mobilized members**

☐ **Promoted participation in the Broker Involvement Program**

☐ **Conducted polling and/or research on member concerns regarding advocacy-related issues**

☐ Advocated for public policy in other ways (please upload/attach an example)

☐ Conducted an activity that highlights or created housing opportunities in the community. Housing Opportunity Grant information is available at http://www.realtoractioncenter.com/for-associations/housing-opportunity/housing-opportunity-grant.html (http://www.realtoractioncenter.com/for-associations/housing-opportunity/housing-opportunity-grant.html)

☐ Used the Land Use Initiative to advocate on a proposed local ordinance or state legislation

☐ Hosted an Expanding Housing Opportunity class

☐ Hosted an Employer-Assisted Housing class

☐ Affected public policy in land use or transportation by engaging members in smart growth activities. Smart Growth Action grant information is available at http://www.realtoractioncenter.com/sggrants (http://www.realtoractioncenter.com/sggrants)

☐ Hosted a Smart Growth for the 21st Century class

☐ Conducted a survey of community residents on attitudes toward growth and development. State and local growth polling resources are available at http://www.realtoractioncenter.com/sgpolling (http://www.realtoractioncenter.com/sgpolling)

☐ Initiated state legislation to create or change state land use laws (limited to state associations)

☐ Conducted a placemaking activity in your community to transform public spaces

☐ Hosted a town hall or forum to address a real estate-related issue

☐ Hosted a candidate debate

☐ Hosted a lobby day at local or state government offices

☐ Distributed "On Common Ground" magazine to public officials

☐ Created or implemented a Call For Action on an legislative or regulatory issue

☐ Participated in community planning

☐ Conducted a Leading with Diversity workshop for association leaders

☐ Conducted an activity to increase diversity and inclusion within the association and its leadership. Diversity grant information is available http://www.realtoractioncenter.com/diversity (http://www.realtoractioncenter.com/diversity)

☐ Participated in a local Fair Housing Assessment

☐ Partnered with a local chapter of NAREB, NAHREP or AREAA to expand member participation in REALTOR® Party advocacy

☐ Used the Broker Involvement Grant to recruit, retain, educate and engage with brokers.

☐ Mobilized members to support an Independent Expenditure candidate

☐ Mobilized members to support an Issues Mobilization campaign

☐ Promoted and encouraged members to sign up for REALTOR® Party Mobile Alerts

☐ Used NAR Consumer Advocacy Outreach database (http://www.realtoractioncenter.com/consumerdb (http://www.realtoractioncenter.com/consumerdb)) to email consumers in your association jurisdictions on legislative issue(s), hearings, or to promote of community program (i.e. Housing Fair, which includes an advocacy component like affordable housing)

☐ **Conducted a consumer-focused Call for Action (CFA). Emailed consumers advocacy focused-message(s) asking them to take action or sign a petition. An association must use the Consumer Advocacy Outreach database to conduct this consumer CFA. Database information (http://www.realtoractioncenter.com/consumerdb (http://www.realtoractioncenter.com/consumerdb)) and consumer advocacy agreement (http://www.realtoractioncenter.com/for-associations/consumers/consumeradvocacyagreement.pdf (http://www.realtoractioncenter.com/for-associations/consumers/consumeradvocacyagreement.pdf)).**

☐ **Created and promoted a consumer-facing website. Information is available at http://homeownershipmatters.realtor/ (http://homeownershipmatters.realtor/) http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html (http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html)**

☐ **Posted consumer content on the Homeownershipmatters.realtor website, or provided NAR consumer-focused content, a story or a story idea for the Homeownershipmatters.realtor website. (A submission form is available at http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html (http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html))**

☐ **Share HomeOwnershipMatters.Realtor content, on your association website, newsletter or social media (Content is available at http://homeownershipmatters.realtor/ (http://homeownershipmatters.realtor/))**

☐ **Set-up a state web page on HomeOwnershipMatters.Realtor website and provide consumer focused content or write and submit content for HomeOwnershipMatters.Realtor site (a submission form is available at http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html (http://www.realtoractioncenter.com/for-associations/consumers/content-submission/content-submission-for.html)).**

☐ **Other(s) Please explain and/or attach examples**

(Note: You can attach multiple files, one at a time)
Attach Document

16. Please check at least two REALTOR® Party "Invest" initiatives or activities conducted by the association and attach examples or explanations for each:

☐ **Hosted a fundraiser benefitting a candidate/REALTOR® Champion**

☐ **Hosted an RPAC phone bank**

☐ **Hosted an RPAC Major Investor Fundraising Event**

☐ **Hosted an RPAC Fundraising Event (REALTOR Party Partnership Grants available)**

☐ **Hosted a soft dollar fundraiser for the Political Advocacy Fund**

☐ **Hosted an event to recruit Corporate Ally Program Participants**

☐ **Hosted an online RPAC auction (NAR's PACtion auction program available)**

☐ **Hosted an event to recruit new President's Circle members**

☐ **Hosted an RPAC Conference (RPAC Conference Grant for State Associations available)**

☐ **Used RPAC Brochures/Flyers (General or Customized/Residential or Commercial) to promote RPAC to members**

☐ **Created and distributed an online or print RPAC newsletter**

☐ **Used the PAC Management System for customized RPAC fundraising campaigns**

☐ **Created and distributed RPAC email campaigns for educational purposes**

☐ **Conducted an RPAC Online Fundraising campaign**

☐ **Created and held RPAC presentations at membership meetings**

☐ **Created and held RPAC presentations at office meetings**

☐ **Used RPAC Recognition Ribbons at meeting to recognize RPAC investors**

☐ **Conducted a Broker Corporate Ally Program fundraising event or activity**

☐ **Conducted a vendor Corporate Ally Program fundraising event or activity**

☐ **Other(s) Please explain and/or attach examples**

(Note: You can attach multiple files, one at a time)
Attach Document

Section III - CONSUMER OUTREACH

Every association will demonstrate engagement in at least four meaningful consumer engagement activities annually, including **at least two activities demonstrating how the association is the "Voice for Real Estate"** in its market, and **at least two activities demonstrating the association's involvement and/or investment in the community.**

1. Being the "Voice for Real Estate" -- promoting market statistics and/or real estate trends and issues (e.g., release through press releases, interviews, etc. of MLS statistics, local market statistics, NAR research reports, local/state analysis of NAR statistics, etc.)

2.Community involvement and investment -- promoting the value proposition of using a REALTOR® and/or engaging in community activities which enhance the image of the REALTOR®, such as organizing human resources (e.g., participating in a Habitat for Humanity build) or conducting fundraising activities to benefit local community or charitable organizations.

To meet this four activity per year requirement, each association must execute a minimum of two "Being the 'Voice for Real Estate' " activities and two "Community involvement and investment" activities during the year. It will not be enough, for example, for an association to engage in the same activity 4 times each year nor will financial support of a charitable organization alone be considered to have met this Mandatory Core Standard. Additionally, any one activity can only be quantified in one category.

1. Being the "Voice for Real Estate"

Check at least two of the following activities (including activities shown under "Other") your association has completed:

17. ☐ **Highlighted local, state or national real estate data and/or buying trends in a news release or direct outreach to local reporters.**

If checked, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association in connection with real estate market data.

Attach Document

18. ☐Arranged interviews with association leadership to provide context to local real estate data.

If checked, upload a copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association's leadership in connection with real estate market data.

Attach Document

19. ☐Identified local angles of data from NAR research reports (residential, commercial or global/international) and reached out to local reporters.

If checked, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association's leadership in connection with real estate market data.

Attach Document

20. ☐Used social media (Twitter, Twitter Chat, Google Hangout, LinkedIn, Facebook, Pinterest, and/or Instagram) to share local real estate data insights, and retweet posts from the NARMedia or NAR Research Twitter accounts

If checked, upload a screen capture of any related social media exchange.

Attach Document

21. ☐Liked / followed HouseLogic's Facebook and/or Twitter presence and shared tips on home owning, selling and buying, and encouraged members to share with their clients and customers.

If checked, upload the file or a screen capture of the post.

Attach Document

22.

☐Used new media communications techniques such as video or infographics to communicate real estate trends and information. Included these in a news release or shared across the association's social media accounts, encouraging members to share with their clients and customers.

If checked, upload the file or a screen capture of the post.

Attach Document

23. ☐Highlighted NAR's Remodeling Impact Report in a news release or direct outreach to local reporters.

If checked, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media venue, or copy of an article or news segment that mentions your association in connection with the RIR report.

Attach Document

24. ☐ **Conducted deskside briefings with local editors to share insights from the local MLS, commercial information exchange, and association-generated real estate data.**

If checked, provide a brief summary of briefing attendees (outlet, editor, association representatives), date of meeting and topics discussed.

Attach Document

25. ☐ **Created a consumer section on your local association website and or/consumer site. The site could include home buying tips and advice, benefits of working with a REALTOR®, questions to ask/issues to consider when choosing a REALTOR®. Content resources are available at HouseLogic.com, realtor.com®, and realtor.org.**

If checked, share the site URL. _____

Other: Please describe below other activities conducted demonstrating how your association is the "Voice for Real Estate". Supporting documentation may be attached.

Attach Document

2. Community involvement and investment

Check at least two of the following activities (including activities shown under "Other") your association has completed:

26. ☐ **Leading with Diversity Workshop**

☐ **Expanding Housing Opportunities Class**

☐ **Employer-Assisted Housing Class**

☐ **Workforce Housing Forums**

☐ **Smart Growth for the 21st Century Course**

☐ **Boys and Girls Club Partnership**

☐ **Other**

Attach Document

27. ☐ **Ran a TV, radio or print ad from NAR's Consumer Advertising Campaign or the state association's consumer advertising campaign in a local media outlet.**

If checked, upload a scanned copy or screen capture.

Attach Document

28. ☐ **Shared digital content from NAR's consumer-facing (@realtors) social media accounts on Facebook, Twitter, and/or Instagram, and encourage your members to do the same.**

If checked, upload a screen capture of the shared content.
Attach Document

29. ☐ **Reached out to reporters to suggest stories demonstrating members' value to home buyers and sellers.**

If checked, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media, or a copy of an article or news segment that mentions your association or association spokesperson in connection with a story about REALTOR® value to home buyers and sellers.
Attach Document

30. ☐ **Reached out to reporters to suggest stories demonstrating members' value to small business owners, retailers and other commercial businesses.**

If checked, upload a sample news release, copy of an e-mail pitch to reporters, screen capture of an exchange on Twitter or other social media, or a copy of an article or news segment that mentions your association or association spokesperson in connection with a story about REALTOR® value to home buyers and sellers.
Attach Document

31. ☐ **Sponsored or participated in job or small business fairs.**

If checked, upload a copy of the promotional material that mentions your association.
Attach Document

32. ☐ **Sponsored homeownership fairs.**

If checked, upload a copy of the promotional material that mentions your association.
Attach Document

33. ☐ **Promoted following HouseLogic's social channels on Facebook and Twitter to members as a source of information on homeownership, buying and selling that they can share with consumers.**

If checked, upload a sample of the promotional material.
Attach Document

34. ☐ **Sponsored a tour of vacant commercial property or a commercial development.**

If checked, upload a copy of the promotional material that mentions your association.
Attach Document

35. ☐ **Sponsored a seminar on investing in commercial property.**

If checked, upload a copy of the promotional material that mentions your association.
Attach Document

36. ☐ **Promoted an open-house weekend.**

If checked, upload a copy of the promotional material that mentions your association.
Attach Document

37. ☐ **Provided material that helps members reach out directly to consumers. For example, encouraging members to follow the consumer-facing GetRealtor social channels on Facebook, Twitter, and Instagram for a source of information about home buying and selling and REALTOR® value that they can share with consumers.**

If checked, upload a sample of the material.
Attach Document

38. ☐ **Shared content and/or materials that help members reach out to businesses, such as employer-assisted housing benefits and relocation information.**

If checked, upload a sample of these materials.
Attach Document

39. ☐ **Partnered with local Chamber of Commerce or Visitors' Bureau to educate consumers on local real estate market and opportunities.**

If checked, provide promotional material or news article documenting the activity or event.
Attach Document

40. ☐ **Sponsored local university/college alumni event about buying your first home, steps to take to prepare yourself financially, and the benefits of homeowership. Alternately, sponsored an event that encourages graduates to consider real estate as a profession, explaining the value of a REALTOR®.**

If checked, provide promotional material or news article documenting the activity or event.
Attach Document

Other: Please describe other activities conducted demonstrating your association's "Community Involvement". Supporting documentation may be attached.

Attach Document

Check any of the following activities your association participated in or completed, and attach at least one example demonstrating community investment.

41. ☐ **Diversity Initiative Grants**

☐ **Housing Opportunity Grants**

☐ **Smart Growth Grants**

☐ **Placemaking Micro-Grant**

☐ **Commercial Innovation Grant**

☐ **Global Achievement Award**

☐ **Other activity (please upload examples)**

(Note: You can attach multiple files, one at a time)

Attach Document

42. ☐ **Participated in a Habitat for Humanity build.**

If checked, upload a copy of related member communications, photos or news coverage of the association's participation in the build.

Attach Document

43. ☐ **Organized REALTOR® participation in a community fundraising drive or event, such as a local walkathon, donation drive, or volunteering at a homeless shelter.**

If checked, upload a copy of related member communications, photos or news coverage of the association's participation in the event.

Attach Document

44. ☐ **Organized a fundraising activity such as a golf tournament, with proceeds benefitting a community organization.**

If checked, upload a copy of related member communications, photos or news coverage of the association's participation in the event. (Note: You can attach multiple files, one at a time)

Attach Document

Other: Please describe other activities conducted demonstrating your association's "Community Investment" involvement. Supporting documentation may be attached.

Attach Document

Section IV - UNIFICATION EFFORTS AND SUPPORT FOR THE REALTOR® ORGANIZATION

A. Core Standard: Every association's bylaws and MLS bylaws (if incorporated) and MLS rules and regulations must be reviewed and approved by NAR at least every two (2) years. View Review Dates

45. Association Bylaws - Date of submission of bylaws certification to NAR: select

46. MLS Rules and Regulations - Date of most recent approval by NAR (if applicable): select

47. MLS Bylaws - Date of most recent approval by NAR (if applicable): select

Note: The bylaw certification form is available at nar.realtor (https://www.nar.realtor/bylcompcert.nsf/mainmenu?openform). If any of the governing documents shown above have been submitted to NAR and review/approval is pending, please identify the document(s) and the date submitted to NAR.

B. Core Standard: Every association will maintain, have access to or will have legal counsel available.

48. Name and Contact Information for Association Legal Counsel:

C. Core Standard: Every association's policies and procedures shall conform to local, state and federal laws, including the filing of necessary reports and documents (e.g., corporate documents, state and federal tax returns, etc.).

49. Date of last filing of state and federal tax returns: select

50. Date of last filing of any corporate documents required by state law: select

D. Core Standard: Every association shall annually certify that its board of directors has reviewed and discussed the association's business or strategic plan, that the plan includes an advocacy component and a consumer outreach component, and that those components have actionable implementation strategies.

51. Date the strategic (or business) plan was most recently reviewed and discussed by the association's board of directors: select

52. Date of approval by NAR: select

(**Note:** Associations are not required to submit their strategic plans or business plans to NAR for review, except when revisions/amendments are made to the plan's "Advocacy" or "Consumer Outreach" components. Those revisions should be sent to NAR at csgrantrequest@realtors.org (mailto:csgrantrequest@realtors.org))

E. Core Standard: Every association's chief paid staff must attend at least six hours of REALTOR® association professional development on an annual basis (i.e., state, regional or national). In associations without paid/salaried staff,

this requirement is applicable to the individual primarily responsible for performing the functions ordinarily carried out by paid staff in other associations. Professional development resources are available at http://www.realtor.org/ae/manage-your-association/core-standards-for-state-and-local-associations/core-standards-professional-development-opportunities (http://www.realtor.org/ae/manage-your-association/core-standards-for-state-and-local-associations/core-standards-professional-development-opportunities) or http://www.realtor.org/ae/professional-development (http://www.realtor.org/ae/professional-development)

53. Program(s) completed and date:

(Note: You can attach multiple files, one at a time)
Attach Document

F. Core Standard: Associations must annually offer, promote or provide at least one professional development opportunity for their members. Professional development resources are available at https://www.nar.realtor/education (https://www.nar.realtor/education).

54. Please explain/describe at least one professional development opportunity that was offered, promoted or provided to members during the current compliance cycle. Examples can be attached below if desired.

(Note: You can attach multiple files, one at a time)
Attach Document

G. Core Standard: Associations must annually certify that they have conducted or promoted a REALTOR® safety activity. REALTOR® Safety information and resources are available at http://www.realtor.org/topics/realtor-safety (http://www.realtor.org/topics/realtor-safety) and at http://www.realtor.org/field-guides/field-guide-to-realtor-safety (http://www.realtor.org/topics/realtor-safety)

55. Please explain/describe a REALTOR® safety activity conducted or promoted by the association during the current compliance cycle. Examples can be attached below if desired.

(Note: You can attach multiple files, one at a time)
Attach Document

H. Core Standard: Associations will annually provide resources for or access to leadership development education and/or training for their elected REALTOR® leaders, and will document the training, tools, programs, and resources they offer or provide access to. Leadership development resources are available at http://www.realtor.org/state-and-local-volunteer-leaders/professional-development (http://www.realtor.org/state-and-local-volunteer-leaders/professional-development)

56. Please explain/describe at least one leadership development training/education opportunity the association made available to their elected REALTOR® leaders during the current compliance cycle. Examples can be attached below if desired.

(Note: You can attach multiple files, one at a time)
Attach Document

I. Core Standard: Associations with paid staff must adopt policies and procedures for conducting annual performance reviews of their chief paid staff, and must annually certify that a performance review for their chief paid staff has been conducted. Chief staff performance review resources are available at http://www.realtor.org/ae/manage-your-association/human-resources-toolkit/chief-staff-performance-evaluation (http://www.realtor.org/ae/manage-your-association/human-resources-toolkit/chief-staff-performance-evaluation)

57. Does the association have policies and procedures for conduction annual performance reviews for the chief paid staff?
○**Yes**○**No**

58. Date of last annual performance review. select

Section V - TECHNOLOGY

A. Core Standard: Every association must have an interactive website (defined as a website with the ability to move between websites and create active links); provide access to professional standards and arbitration filing processes on the website; and includes links to the websites of the other levels of the association for promotion of member programs, products and services.

59. Website URL:

B. Core Standard: Every association must utilize an email and/or internet based means for member communication. (Note: This requirement is met by maintaining an interactive website.)

Section VI - FINANCIAL SOLVENCY

A. Core Standard: Every association must adopt policies to ensure the fiscal integrity of their financial operations. These financial policies might cover topics and subjects such as:

- fraud awareness and prevention
- budgeting
- dues collection
- financial information disclosure
- officer, member, and staff travel
- investing
- reserve levels
- payment policies
- compliance reporting
- compensation
- revenue recognition
- asset capitalization
- financial reporting
- conflicts of interest
- whistleblower
- document retention

60. Attach a copy of the association's financial policies.

Attach Document

Note: Associations are not required to adopt all of the financial policies suggested above, but must adopt and attach those deemed necessary to ensure the fiscal integrity of the association's operations.

B. Core Standard: Every association must have an annual audit, review or compilation conducted by a CPA. Please refer to the FAQs available on Realtor.org for definitions/explanations.
Note: Only those associations with annual gross revenue of less than $50,000 (including MLS-generated revenues and revenues from other business subsidiaries) are permitted to meet the Standard using a compilation report. State and national dues and assessment amounts are not considered to be revenue for purposes of this measurement.

61.

○**Audit** ○**Review** ○**Compilation**

- Date of last financial audit/review/compilation: select
- Name of the individual or firm conducting the review:
- Year end to which the report relates:
- If an audit, what type of opinion was received:

Note: Because the compliance cycle was transitioned to the calendar year beginning with the third cycle – July 1, 2016-December 31, 2017 - CPA engagement letters are no longer acceptable in lieu of the required financial audit, review or compilation.

Core Standards Certification Form Agreement

☐ **I confirm that the Association President, President-Elect and Association Executive of this association have reviewed and approved this application.**

Save and Return Later --or-- Submit Core Standards Certification form

Update History

Headquarters

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