**Local 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

4. Does the Association have access to a certified Professional Standards Administrator, or administer professional standards enforcement through a multi-board or regional standards agreement?

* Yes
* No

If yes, enter name of administrator

**C. Core Standard: Every association will link its website to the Code of Ethics/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.**

5. 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.**

6. 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.

7. 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.

8. 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/CAP (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.**

9. 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

10. Associations may instead include in their dues billing a voluntary investment for the Political Advocacy Fund (PAF) or the Corporate Ally Program (CAP) 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/CAP Dues Billing “above the line”
* PAF/CAP Dues Billing “below the line”
* N/A

11. 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

**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).**

12. 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.**

13. 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.g., Membership Meetings, Sales Meetings, etc.)
* Other digital materials
* Other printed materials

14. 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® Party website](https://realtorparty.realtor/member-consumer/calls-for-action/call-for-action-reports).)

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

15. 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.g., Membership Meetings, Sales Meetings, etc.)
* Other digital materials
* Other printed materials

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

* No State Calls to Action
* N/A

(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**](https://www.realtorparty.realtor/wp-content/uploads/resource-guide/MRP-Resource-Guide.pdf)**.**

17. 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

18. 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 [here](https://realtorparty.realtor/community-outreach/housing-opportunity)
* 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 [here](https://realtorparty.realtor/community-outreach/smart-growth)
* 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 [here](https://realtorparty.realtor/community-outreach/smart-growth/polling-program.html)
* 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
* Participated in a local Fair Housing Education program or Assessment
* 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 to educate and raise awareness with consumers in your association jurisdictions on legislative issue(s) or the promote the value of property ownership and/or an issue that makes them more informed about how real estate public policies impact them in their communities
* 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](https://realtorparty.realtor/consumeradvocacy).
* Used the Consumer Advocacy Outreach grant to create consumer advocacy activities in your association communities that advance wise public policies that strengthen the real estate market, promote property ownership, and build strong communities leading to a healthy economy. https://realtorparty.realtor/member-consumer/consumer-advocacy/grant-application
* Submitted consumer-related grassroots, advocacy content, story or a story idea for inclusion on your state-specific page on the Homeownershipmatters.realtor website (https://homeownershipmatters.realtor/).
* Share HomeOwnershipMatters.Realtor content, on your association website, newsletter or social media (Content is available [here](http://homeownershipmatters.realtor/)
* Other(s) Please explain and/or attach examples

19. 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 new President’s Circle members
* Hosted a soft dollar fundraiser for the Corporate Ally Program
* Hosted an RPAC Training Conference
* Distributed RPAC Brochures (Residential or Commercial)
* Created and distributed RPAC email campaign for fundraising/educational purposes
* Held RPAC presentations at membership meetings
* Held RPAC presentations at office meetings
* Used RPAC ribbons, tags, etc. at meeting to recognize RPAC investors (NAR does not provide ribbons, tags, etc. for recognition)
* Other(s) Please explain and/or attach examples

**Section III - Consumer Outreach**

**1. Being the “Voice for Real Estate” Check at least two of the following activities (including activities shown under “Other”) your association has completed:**

20. 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.

21. 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.

22. 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.

23. 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 NAR Media or NAR Research Twitter accounts

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

24. 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.

25. 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.

26. 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.

27. 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

28. 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.

**2. Community involvement and investment:**

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

29. Check at least two of the following activities (including activities shown under “Other”) your association has completed:

* Leading with Diversity Workshop
* Workforce Housing Forums
* Smart Growth for the 21st Century Course
* Boys and Girls Club Partnership
* Food Recovery Network Program
* Other

30. 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.

31. 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

32. 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.

33. 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.

34. Sponsored or participated in job or small business fairs.

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

35. Sponsored homeownership fairs.

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

36. 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.

37. Sponsored a tour of vacant commercial property or a commercial development.

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

38. Sponsored a seminar on investing in commercial property.

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

39. Promoted an open-house weekend.

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

40. Provided material that helps members reach out directly to consumers. For example, encouraging members to follow the consumer-facing That’s Who We R 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.

41. 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.

41. 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.

42. 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.

43. Sponsored local university/college alumni event about buying your first home, steps to take to prepare yourself financially, and the benefits of homeownership. 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.

44. Facilitated a Good Neighbor Awards program (or similar program by another name) that recognizes REALTORS® for making a positive impact in the community through volunteer service. The association’s program should involve a monetary donation to the award recipients chosen non-profit organization and promoting award recipients achievements to the media and community.

If checked, upload a copy of your application, and the announcement of award recipients.

Other: Please describe other activities conducted demonstrating your association’s “Community Involvement”. Supporting documentation may be attached.

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

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

* Diversity Initiative Grants
* Housing Opportunity Grants
* Smart Growth Grants
* Placemaking Micro-Grant
* Commercial Innovation Grant
* Global Achievement Award
* Other activity (please upload examples)

46.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.

47.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.

48.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)

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

**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 compliant with NAR's mandatory policies. MLS rules and regulations and MLS Bylaws (if applicable) must be certified by the association.**

49. Association Bylaws\* - Date of bylaws certification to NAR:

mm/dd/yyyy

50. MLS Rules and Regulations - Date of submission of MLS rules and regulations certification to NAR. (if applicable):

mm/dd/yyyy

51. MLS Bylaws - Date of submission of MLS bylaws certification to NAR (if applicable):

mm/dd/yyyy

\*Note: Association bylaws are not reviewed by NAR staff. Instead local association’s AEs are to certify that their association bylaws include the five (5) mandatory provisions that NAR requires to be adopted. There is no need to recertify the bylaws on an annual/periodic basis. Associations will be asked to re-certify only if NAR requires that changes be made to any of the aforementioned 5 mandatory provisions. In that case, associations will be notified and provided with a link to the certification form. More information about bylaws certification and resources are here.

52. If your MLS governing documents have been submitted to NAR and review/approval is pending, please identify the document(s) and the date submitted to NAR in the comment box below.

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

53.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.).**

54. Date of last filing of state and federal tax returns

mm/dd/yyyy

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

mm/dd/yyyy

**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.**

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

mm/dd/yyyy

**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** [**here**](https://www.nar.realtor/ae/manage-your-association/core-standards-for-state-and-local-associations/core-standards-professional-development-opportunities) **or** [**here**](https://www.nar.realtor/ae/professional-development)

57. Program(s) completed and date:

**F. Core Standard: Associations must annually offer, promote or provide at least one professional development opportunity for their members. Professional development resources are available** [**here**](https://www.nar.realtor/education/designations-and-certifications/at-home-with-diversity-ahwd)

58. 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.

**G. Core Standard: Associations must annually certify that they have conducted or promoted a REALTOR® safety activity. REALTOR® Safety information and resources are available** [**here**](https://www.nar.realtor/safety)

59. 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.

**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** [**here**](https://www.nar.realtor/leadership-development-resources)

**Assessment and encouragement of Diversity, Equity and Inclusion (DEI); Education, understanding and awareness of Core Standards; Understanding of the roles and responsibilities of staff and volunteer leaders as outlined in the President/Chief Staff Executive Checklist (link shown below).**

60. 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.

**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** [**here**](https://www.nar.realtor/ae/manage-your-association/human-resources-toolkit/chief-staff-performance-evaluation)

61. Does the association have policies and procedures for conducting annual performance reviews for the chief paid staff?

* Yes
* No

62. Date of last annual performance review.

mm/dd/yyyy

**J. Core Standards: Associations must annually certify they have either conducted or promoted a DEI and a Fair Housing activity. This requirement can be met by completing a number of different activities, such as the following:**

* **Measure and assess membership diversity in the association membership and develop an actionable roadmap for local association DEI**
* **Conduct Fair Housing Training**
* **Conduct an At Home with Diversity (AHWD®) course**
* **Form a Diversity Committee of Fair Housing Committee**
* **Conduct implicit bias training (e.g. NAR’s implicit bias video)**
* **Other DEI or Fair Housing activities.**

Note: Fulfilling these requirements under Section IV. Unification Efforts may also fulfill a requirement under Section II. Advocacy or Section III. Consumer Outreach, but not both.

63. Please explain/describe the DEI and fair housing activities conducted by the Association. Examples can be attached below if desired.

**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.**

64. 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**

Attach a copy of the association’s financial policies.

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.**

65. Please select:

* Audit
* Review
* Compilation

66. Date of last financial audit/review/compilation:

mm/dd/yyyy

67. Name of the individual or firm conducting the review:

68. Year end to which the report relates:

mm/dd/yyyy

69. If an audit, what type of opinion was received:

Attach a copy of the cover letter from the firm conducting the audit, review, or compilation. Note: Do not attach a complete copy of the audit, review, or compilation.