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#AEI2024

AE FUNDAMENTALS: CORE STANDARDS 101

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Information & Resources

WHAT ARE CORE STANDARDS?

SIX CATEGORIES



The Core Standards are intended to raise the bar for REALTOR® associations and ensure high-quality service for members. The standards, ensure strategic alignment with all entities of the REALTOR® association. All REALTOR® associations, as a condition of membership, are required to annually comply with a set of standards that are specific to local and state associations and commercial overlay boards.

- **Code of Ethics**
- **Advocacy**
- **Consumer Outreach**
- **Unification Efforts and Support of the REALTOR® Organization**
- **Technology**
- **Financial Solvency**

CODE OF ETHICS

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


ADVOCACY

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

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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

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ADVOCACY

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

ADVOCACY

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



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

- No NAR Calls for Action
- N/A

(Note: State associations can monitor local association participation through the REALTOR® [Party website](#) .)

ADVOCACY

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



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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.)

ADVOCACY

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](#).

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

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ADVOCACY

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](#)
- 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](#)
- 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](#)
- Initiated state legislation to create or change state land use laws (limited to state associations)



ADVOCACY

- 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](#).
- 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](#))
- Other(s) Please explain and/or attach examples


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ADVOCACY

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

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CONSUMER OUTREACH

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:

19. 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.

 **UPLOAD**

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20. 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.

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21. 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.

 **UPLOAD**

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CONSUMER OUTREACH


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)

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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.

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UNIFICATION EFFORTS & SUPPORT FOR THE REALTOR® ORGANIZATION

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 reviewed and approved by NAR at least every two (2) years. View Review Dates

Association Bylaws* - Date of bylaws certification to NAR (auto-populated from NAR's records): not certified

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

mm/dd/yyyy

49. MLS Bylaws - Date of most recent approval by 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.

UNIFICATION EFFORTS & SUPPORT FOR THE REALTOR® ORGANIZATION

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](#)

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.

09/27/2023

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.

TECHNOLOGY

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.

61. 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.)

PREVIOUS SECTION

NEXT SECTION

SAVE AND RETURN LATER

FINANCIAL SOLVENCY

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.

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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.

62. Please select:

- Audit
- Review
- Compilation

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



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

ACCESSING CORE STANDARDS

Empowering REALTORS® to achieve their real estate ambitions.

REALTOR® Code of Ethics

Watch That's Who We R: "The Right Thing" ▶

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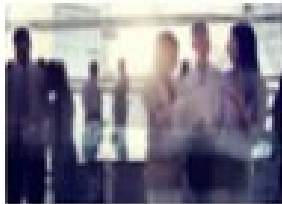
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Core Standards for State and Local Associations

Information on the **core standards** for state and local REALTOR® associations, aiming to ensure high-quality service for REALTORS®.

[FAQs](#) [Compliance/Resources](#)

Core Standards for State and Local Associations

Core Standards Certification Form

Core Standards Criteria

Core Standards FAQs

Appeal Hearing Process

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The Board of Directors approved a series of Core Standards recommendations that impact the appeal hearing process including:

- Enforcing a firm December 31 deadline by when local and commercial associations must complete their Core Standards certification forms
- Formalizing the process by which state associations communicate issues of a local association's non-compliance to NAR
- Allowing state associations to meet with and provide written documentation to the hearing panel before any appeal
- Prohibiting Core Standards hearing panels from granting extensions to non-compliant associations.
- Requiring a warning letter by February 1 to chief staff and officers of non-compliant associations
- Allowing hearing panels to set a one-year probationary period on non-

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Core Standards Certification Form

Association ID: 1

Association Name: NATIONAL ASSOCIATION OF REALTORS®

President: Kevin M Sears

Email: KevinSears@SearsRE.com

President Elect:

Executive Officer: Nykia Wright

Email: nwright@nar.realtor

Address: 430 North Michigan Ave.

Chicago, IL 60611

Phone:(800) 874 6500

If this information appears to be incorrect, please update it on [MI](#)

Local Association Dashboard

Welcome hibler! You are logged in as:

Larry Hibler

NRDS ID# 80400215

[Add associations](#)

[Add or remove assigned users to associations](#)

[Create, edit or submit a new Core Standards Certification Form](#)

[View past Core Standards Certification Forms](#)

Form Current Status: In Progress

Documents uploaded to the Certification Form are automatically saved. Clicking on the Next Section button (below) saves what you have input thus far. You can return to this page later to make further additions and modifications.

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®

NOTE: Answers from last year's submitted Certification Form are auto-populated for your convenience and may be overwritten if the information has changed. Uploaded documents from last year's Certification Form are not auto-populated.

[PRINTER VERSION](#)

SECTION I - CODE OF
ETHICS

SECTION II - ADVOCACY

SECTION III - CONSUMER
OUTREACH

SECTION IV - UNIFICATION
EFFORTS AND SUPPORT
FOR THE REALTOR
ORGANIZATION

SECTION V - TECHNOLOGY

SECTION VI - FINANCIAL
SOLVENCY

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.

SUBMIT CORE STANDARDS CERTIFICATION FORM

QUICK TIPS

- Ensure you are using the correct login information
- Access M1 to make changes to Association leadership
- For questions with your username/password, contact NAR Member Support at (800)-874-6500

HELPFUL INFORMATION

WHAT COUNTS FOR A CORE STANDARD?

Activities that satisfy a core standard will be listed on the core standards certification form under the corresponding standard. However, if an association is unsure about an activity they conduct that is not listed on the form, we encourage them to reach out to their state association for verification.

WHEN IS THE CORE STANDARDS DEADLINE?

NAR's hard deadline for Core Standards is December 31 of each year. However, your state association may impose an earlier deadline to ease the review period and ensure compliance of their boards.

WHAT IF AN ASSOCIATION DOESN'T HAVE AN AE OR PAID STAFF?

Associations without paid staff are still responsible for completing Core Standards by year's end.

CAN AN ACTIVITY COUNT MORE THAN ONCE?

Activities can only count towards one core standard at a time. However, Promoting or conducting either a Diversity, Equity and Inclusion or Fair Housing activity that falls within the Unification Efforts category may also count toward compliance in the Advocacy or Consumer Outreach categories, but not both. Meaning, an activity cannot count toward compliance in all three categories, but rather a combination of the Unification Efforts category and the Advocacy OR Consumer Outreach categories.

IS PROOF REQUIRED TO VERIFY A BOARD CONDUCTED AN ACTIVITY?

If proof is required for a core standard, it will be indicated explicitly on the certification form itself. Also, your state association may request additional documentation at their discretion when reviewing your form.

WHERE DO I GO FOR HELP?

We can be reached by email
at NARPolicyQuestions@NAR.realtor, or (312) 329-8399.

Your state association of REALTORS® can also assist.

Association Executives > Manage Your Association

Core Standards for State and Local Associations



[Core Standards Certification Form](#)

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QUESTIONS?

THANK YOU.



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