

AE COMPETENCIES AND RCE BODY OF KNOWLEDGE**A Guide for the Successful REALTOR® Association Executive**

The desired skills, attributes, and knowledge base of a successful REALTOR® association executive (AE) vary from association to association, depending on association's size, organizational structure, and demographics, as well as the diverse needs of its members.

This document identifies five competencies in which an AE shall be proficient to successfully serve the evolving REALTOR® association. Within each competency there are three levels of knowledge. Each of the five competencies is attached to a body of knowledge that identifies topics leading to proficiency at the three defined levels. This document can be integrated into different formats for the following uses:

- Tool/checking for association executives to assess their own strengths and needs for further education
 - Reference tool for NAR's Association Executives Committee (AEC) in planning professional development programming and identifying external sources of education and information
 - Preparation for the RCE exam
- ❖ Please note that the RCE Body of Knowledge is identified by a diamond symbol

MANAGE THE ASSOCIATION AND ITS BUSINESS OPERATIONS

Association executives (AEs) today need a comprehensive skill set, including the ability to prioritize time, finances, materials, space and human resources; to plan and coordinate processes to produce desired results; build a professional environment of trust and respect; and optimize association resources to ensure effectiveness of association decisions and provide knowledge for members.

ADMINISTRATIVE LEVEL	MANAGEMENT LEVEL	LEADERSHIP LEVEL
Possess general knowledge of business and financial operations; establish good working relationships with service providers, volunteers and staff; efficiently administer association business.	Develop and manage staff around an organizational plan with clear responsibilities; ensure that strategic planning and business planning processes are in place.	Seek out new and innovative programs, products and services; develop creative management solutions; cultivate a highly evolved and trained staff team; be a respected and motivating influence for staff and leaders.

ASSOCIATION STRUCTURES AND RELATIONSHIPS

❖ Understand board of choice and universal access to services	❖ Understand the shared services concept	❖ Define and implement structural and internal audits
❖ Understand association structure – 501(c)6 for-profit and applicability to REALTOR® associations	• Create and implement systems to meet the current and future needs of the members	• Regularly evaluate other association structures and their potential benefits and ramifications
❖ Understand the structure of a 501(c)3 non-profit subsidiary (e.g., charitable or education foundation)	• Identify potential opportunities to implement local councils, chapters, or satellite offices	• Explore and engage in discussions on shared service agreements and/or mergers, when deemed in the best interest of the organization
❖ Understand the Three-Way Agreement		
❖ Understand the advantages and disadvantages of mergers/consolidations and describe how they are accomplished		

ASSOCIATION TECHNOLOGY

❖ Understand fundamental relationship database technology, including M1 (formerly known as NRDS), and be able to demonstrate the skills necessary to be a point of entry (POE)	❖ Use social media to communicate with members and the public (e.g., Facebook, YouTube, LinkedIn, Instagram, etc.)	
❖ Be familiar with website resources including www.nar.realtor, and state association websites	❖ Demonstrate competency using technology tools such as webinars, virtual meeting software, podcasts, cloud storage, etc.	
❖ Develop and manage an interactive website, as mandated by the NAR Core Standards. Website to include links to other levels of the association for promotion of member programs, products and services, and access to professional standards and arbitration filing processes.	❖ Perform due diligence when working with and engaging third parties who receive, store, and work with the association data assets including member information, areas of cybersecurity, privacy policies, risk assessments, access and storage, and liabilities for data protection	
❖ Have working knowledge of social media from the association perspective and how to communicate with members and the public (e.g., Facebook, YouTube, LinkedIn, Instagram, etc.)	• Be prepared to advise members on how to use social media in their businesses in a professional manner (e.g., Facebook, YouTube, LinkedIn, Instagram, etc.)	
❖ Identify e-commerce options (i.e., NAR and others)	• Assess and identify the various solutions for virtual conferencing (e.g., Zoom, Webex, Skype) to determine the best fit for the content that needs to be delivered and the targeted audiences, including a review and assessment of Learning Management Systems (LMS) solutions to deliver online educational courses to members	
• Demonstrate competency with office productivity tools, including implementation of effective and effective channels, data analytics, accounting software, customer relationship management (CRM) applications		
• Stay informed about the latest technology trends both inside and outside the real estate sector		
BUDGET AND FINANCIAL MANAGEMENT		
❖ Understand applicable IRS regulations governing for-profit and not-for-profit corporations; unrelated business income tax	❖ Identify components needed to develop, monitor, and implement the association budgets, including planning for a capital budget	❖ Understand the different corporate tax structures (e.g., tax exempt, for profit, foundation, parent and subsidiary companies)

<p>(UBIT); and the basic requirements of IRS Form 990 and 990T, as well as any other required state forms for exempt organizations. If the association is not tax-exempt or has for-profit subsidiary entities, understand basic requirements of the IRS Form 1120 and any required state income tax returns.</p>		
<ul style="list-style-type: none"> ❖ Understand state corporate law, sales and include tax law and reporting requirements relevant to the association 	<ul style="list-style-type: none"> ❖ Determine products and services and expectations for a business plan 	<ul style="list-style-type: none"> ❖ Determine the structure that best suits the association’s strategic objectives
<ul style="list-style-type: none"> ❖ Adopt policies to ensure the fiscal integrity of the association’s financial operations, as mandated by the NAR Core Standards: policies and practices include basic bookkeeping skills; accounting principles including the difference between cash and accrual accounting; payroll management; applying financial controls including internal and external audit procedures; reviews and/or compilations; enforcing policies and procedures; adopt a conflict of interest and records retention policy 	<ul style="list-style-type: none"> ❖ Understand and implement e-commerce applications and understand principles related to association business 	<ul style="list-style-type: none"> ❖ Evaluate whether a foundation can help meet association’s goals
<ul style="list-style-type: none"> ❖ Understand NAR Core Standards requirements relating to the requirement to have an audit, review or compilation report prepared by a CPA annually based on the annual revenue of the association: <ul style="list-style-type: none"> ❖ If association’s annual revenues are \$50,000 or more, it must obtain a CPA report that includes an audit opinion or an accountant’s review report ❖ If association’s annual revenues are less than \$50,000 annually, it must obtain a compilation report prepared by a CPA 	<ul style="list-style-type: none"> ❖ Train to ensure that that board of directors and other volunteer leadership understands its role in the financial management of the association’s assets 	
<ul style="list-style-type: none"> ❖ Forecast association financial needs and plan accordingly to meet strategic objectives 	<ul style="list-style-type: none"> • Understand and present appropriate financial reports to various audiences (e.g., board of directors, membership, auditors, 	

	legal counsel, public, government entities)	
❖ Understand all aspects of the NAR dues variable formula		
• Understand requirements and deadlines, and develop a process for completing and filing all government forms (e.g., 1099s, W2s)		
• Develop and implement association investment policies		

COMMERCIAL SERVICES AND STRUCTURES

❖ Understand commercial structures and overlay boards	• Seek commercial accreditation from NAR	• Develop programs, education, products and services designed to serve commercial members
❖ Understand the services offered to associations through NAR’s Commercial team	• Understand and address real estate advocacy needs and concerns	• Engage members in the commercial real estate marketplace through communications and industry events
❖ Understand how NAR supports the commercial real estate sector, including resources and services available for members on www.nar.realtor/commercial	• Seek out best practices for serving commercial members	
❖ Understand the Institute Affiliate Dues structure	• Utilize the Commercial Innovation Grant Program for developing programs for commercial members	
❖ Understand NAR’s industry partners, including the five NAR commercial affiliate organizations and other external organizations	• Incorporate a commercial-specific division into a multiple listing service or operate a commercial information exchange or commercial MLS for members to cooperatively share listing information	
❖ Provide access to NAR’s commercial resources, including research and technology tools (RPR Commercial, www.commercialsearch.com) and commercial advocacy information)	• Understand and be able to communicate commercial real estate’s economic impact specific to individual markets	

FACILITIES AND EQUIPMENT

❖ Comply with the provisions of the ADA, as well as state and local fire marshal, zoning, and occupancy restrictions	❖ Perform needs assessments for facilities and equipment; develop RFPs for significant purchases	• Understand the basics of building design and be an advocate for sustainable features
❖ Implement appropriate risk reduction/insurance activities	❖ Understand the issues related to maintenance, lease, and purchase agreements	• Purchase/lease equipment or facilities based on cost/benefit analysis

<ul style="list-style-type: none"> • Maintain a list of all capital equipment with date purchased, and include depreciation and potential replacement costs 	<ul style="list-style-type: none"> • Have a maintenance plan for building, grounds, and equipment 	
<ul style="list-style-type: none"> • Create a contact list of vendors who provide services in your building so the association is prepared in an emergency 	<ul style="list-style-type: none"> • Understand the principles of property management 	
<ul style="list-style-type: none"> • Maintain a file of all services and contracts performed in the building with date service performed, provider, and cost 	<ul style="list-style-type: none"> • Coordinate vendor selection and manage ongoing supplier relationships 	
<ul style="list-style-type: none"> • Have a basic emergency response plan for evacuations and lockdowns that outlines staff options; review plan with staff annually (e.g., natural disasters, pandemics, police activity) <ul style="list-style-type: none"> • Have familiarity with where to access emergency response resource information, such as the NAR and state websites • Ensure the plan includes information on IT usage during the emergency 	<ul style="list-style-type: none"> • Stay informed about sustainable building concepts and smart building technologies; implement in facilities and operations as feasible 	
	<ul style="list-style-type: none"> • Create an annual capital asset replacement plan 	
	<ul style="list-style-type: none"> • Understand the differences between on-premises equipment (capital expense) and managed services through a cloud-based provider (operational expense) 	
HUMAN RESOURCE MANAGEMENT		
<ul style="list-style-type: none"> ❖ Identify and understand employee hiring and termination procedures, and be able to document actions in compliance with employment law 	<ul style="list-style-type: none"> ❖ Succession strategy: development of succession strategies for key association positions (such as an emergency transition plan, ongoing development and cross-training of key staff) 	<ul style="list-style-type: none"> • Utilize resources for management, including salary surveys and benefit comparisons
<ul style="list-style-type: none"> ❖ Understand appropriate federal and state employment issues including worker's compensation insurance, wrongful dismissal and unemployment claims 	<ul style="list-style-type: none"> • Develop, utilize and manage association's compensation and benefits programs and provide comparative data to ensure employee retention 	<ul style="list-style-type: none"> • Demonstrate change management skills and ability to adapt to change, as it impacts the workforce in attracting and retaining employees
<ul style="list-style-type: none"> ❖ Identify questions that may/may not be asked in job interviews 	<ul style="list-style-type: none"> • Annually assess health and other insurance costs to ensure programs align with budget 	
<ul style="list-style-type: none"> ❖ Know the classes protected by federal and state law 	<ul style="list-style-type: none"> • Create, review, and update procedures and duties in compliance with policies and procedures 	

❖ Understand the differences between exempt and non-exempt positions	<ul style="list-style-type: none"> • Develop conflict resolution solutions with employees 	
❖ Understand the ramifications of hiring an independent contractor	<ul style="list-style-type: none"> • Motivate, guide, coach, mentor, and develop employees 	
❖ Annually review and update as needed, current job descriptions for each staff member	<ul style="list-style-type: none"> • Understand when staff structures need to be revised to achieve organizational goals 	
❖ Conduct annual performance reviews for each employee		
<ul style="list-style-type: none"> • Ensure all employee records are properly filed and secure 		
<ul style="list-style-type: none"> • Review and update of HR policies and procedures/employee handbook on an annual basis 		
<ul style="list-style-type: none"> • Implement effective communication channels and strategies to engage staff and resolve disputes 		
<ul style="list-style-type: none"> • Provide employee coaching and frequent performance feedback; know the steps to corrective action 		
<ul style="list-style-type: none"> • Provide and utilize the association's up-to-date, legally compliant employee handbook 		
<ul style="list-style-type: none"> • Develop a checklist for new employee orientation 		
<ul style="list-style-type: none"> • Demonstrate knowledge of employee compensation and benefits 		

LEGAL AND REGULATORY ACTIVITIES

❖ Maintain, or have access to, legal counsel, as mandated by the NAR Core Standards, and understand how to select and manage outside counsel relationships, including litigation management and basic litigation principles	<ul style="list-style-type: none"> • Keep abreast of current real estate legal and regulatory issues at the federal, state and local level 	<ul style="list-style-type: none"> • Understand legal and financial implications of the association and its relationship with the MLS, including preservation of the association's tax-exempt status if applicable
❖ Understand the application of the Americans with Disabilities Act (ADA), state and local regulations to association activities and ensure compliance, including website accessibility compliance	<ul style="list-style-type: none"> • Understand data privacy laws, including GDPR and other state privacy laws, which impact the association's collection, retention, and dissemination of information 	<ul style="list-style-type: none"> • Develop educational materials and/or conduct session for members on risk reduction
❖ Have an understanding of antitrust laws fundamentals and ensure association's compliance with these laws; provide training to volunteer leadership and information to members regarding anti-trust		<ul style="list-style-type: none"> • Advocate at local, state and federal level regarding real estate-related legal and regulatory issues

❖ Implement and maintain a document retention policy and ensure compliance		<ul style="list-style-type: none"> • Establish and nurture relationships with regulatory bodies dealing with real estate
❖ Minimize liability for the association, officers, directors, and committees, through understanding providing training to leadership on fiduciary duties and other key responsibilities		<ul style="list-style-type: none"> • Understand the difference between the functions and authority of regulatory agencies and legislative entities, and how government works at all three levels
❖ Understand and ensure compliance with trademark policies applicable to the REALTOR® trademark		
❖ Understand intellectual property laws, including patent laws and copyright law concepts, and the licensing of music, software, photos, etc. to ensure compliance and avoid legal liability		
❖ Understand insurance policies, coverage, and limits of insurance, particularly NAR's umbrella professional liability policy; understand and determine coverage and limits of NAR's Umbrella Policy and combine with commercial coverage where applicable		
❖ Understand the legal liabilities of social media		
❖ Understand basic contracting principles and concepts, and contract clauses, such as indemnification, limitations of liability, force majeure and governing law, to protect the association and protect it from potential liabilities for association		
<ul style="list-style-type: none"> • Be aware of NAR and state association Legal Action Funds and legal resources 		
<ul style="list-style-type: none"> • Have a working knowledge of state real estate license laws and the separate roles of the licensing/regulatory body and the association 		
<ul style="list-style-type: none"> • Be aware of local and state business license requirements 		
<ul style="list-style-type: none"> • Understand the fundamentals of harassment and discrimination laws, the importance of maintaining a policy for both staff and volunteer leaders, how to conduct internal investigations (which may 		

include working with outside counsel), and training and educational efforts for both employees and volunteer leaders on these concepts		
<ul style="list-style-type: none"> Understand disaster preparedness and disaster-readiness concepts in order to prepare the association, its staff and members to respond quickly in the event of a disasters and ensure and address continuity of operations 		
<ul style="list-style-type: none"> Understand Telephone Consumer Protection ACT (TCPA) and Do-Not-Call (DNC) laws, including how these laws impact the associations marketing and other outreach efforts to members and non-members 		
<ul style="list-style-type: none"> Understand cyber-fraud issues, current cyber-fraud techniques and scams, best practices to implement in order to protect the association from vulnerabilities, and how to respond if association is the subject of a cyber-fraud attack 		
MEETING MANAGEMENT		
<ul style="list-style-type: none"> ❖ Develop policies with volunteers regarding committee and agenda preparation, defining the purpose of the meeting, meeting notices, materials preparation and recording of meeting minutes pursuant to association policy and Robert’s Rules of Order 	<ul style="list-style-type: none"> • Plan conferences, trade shows, and other association events 	<ul style="list-style-type: none"> ❖ Research and negotiate contracts with favorable terms for the association with speakers and facilities
<ul style="list-style-type: none"> ❖ Work with volunteers to develop successful meeting and event planning procedures including speaker and site selection, room set-up, AV use, food/ beverage and registration and fees 	<ul style="list-style-type: none"> • Conduct surveys, focus groups, task forces and committees for member input on meetings 	<ul style="list-style-type: none"> • Create sponsorship programs, coalitions and partnerships to enhance association goals
<ul style="list-style-type: none"> ❖ Understand basic elements of meetings contracts, including cancellation policies (e.g., force majeure clause), insurance policies and vendor liability law 	<ul style="list-style-type: none"> • Identify and recruit appropriate speakers, topics and venues for meetings; be cognizant to avoid any perceived or actual conflict of interest 	
<ul style="list-style-type: none"> ❖ Ensure policies and procedures are in place to address attendees requiring special accommodations 	<ul style="list-style-type: none"> • Develop relationships with key sponsors to ensure continued association involvement 	

❖ Develop procedures for meeting follow-up and evaluation	• Participate in professional meeting groups	
❖ Utilize technology tools for conference calls, videoconferencing, podcasts, webinars, etc.		
• Handle speaker/special guest arrangements		
• Implement meeting policies, including registrations, cancellations, and refunds		
• Work with volunteers to seek sponsors for programs and events		
• Ensure association calendar is updated with meeting and event information		
• Promote conferences, trade shows and other association events		
• Create policies on remote meetings and voting, in compliance with state laws		
• Create crisis cancellation procedures for meetings		
MEMBERSHIP DEVELOPMENT		
❖ Gain basic understanding of strategic goals for membership development	❖ Create realistic membership goals that are reflected in the association's strategic plan and obtain the resources necessary to accomplish them	❖ Understand membership trends in real estate and other related industries and measure the impact of those trends
❖ Understand the membership classifications and the membership benefits and programs at all three levels of REALTOR® associations (local, state, and national) and on NAR.realtor	❖ Develop and maintain a member value proposition	• Position the REALTOR® Code of Ethics as the foundation of REALTOR® membership
• Understand the motivating factors behind a real estate licensee's decision to join the REALTOR® association	• Develop appropriate methods of member retention	• Implement ongoing evaluation and updating of membership goals and value proposition
• Know the current composition/demographics of the REALTOR® association membership and non-member licensees	• Understand the relationship of the association and primary MLS to promote the value of the association/MLS	• Promote the value of the REALTOR® brand
• Understand the economic climate, along with real estate and general market conditions, impacting the industry, and assess the needs of members in all segments in order to effectively address those issues	• Interact with members through outreach to promote the value of the association/MLS	• Identify, develop and promote member benefits targeted at specific member segments

<ul style="list-style-type: none"> Gain basic understanding of member benefits and programs at all three levels of the REALTOR® organization 		
<ul style="list-style-type: none"> Ensure programs and benefits are reviewed, updated, and discontinued, if necessary, at least annually 		
PLANNING AND VISIONING		
<ul style="list-style-type: none"> Understand the main elements of strategic plans, business plans, and mission and vision statements 	<ul style="list-style-type: none"> Regularly examine industry trends that may impact the association’s vision, mission and/or strategic or business plan, and report to volunteer leadership 	<ul style="list-style-type: none"> Understand and utilize best practices for gathering information, including member surveys, focus groups, etc.
<ul style="list-style-type: none"> Annually adopt a strategic or business plan that meets or exceeds NAR Core Standards 	<ul style="list-style-type: none"> Manage the elements and process of forming a strategic planning session, including a committee, location, agenda, responsibilities, assignments, review and follow-up, selecting a facilitator and assuring that diverse stakeholders are represented 	<ul style="list-style-type: none"> Understand impacts of demographic differences to address the desires and needs of future members and leadership when planning and visioning
<ul style="list-style-type: none"> Know the importance of effective needs analysis, including both surveys and focus groups 	<ul style="list-style-type: none"> Develop business plans for the overall association, as well as for new products/services, and manage budget integration 	<ul style="list-style-type: none"> Recognize key business elements that impact effective planning, including technology, dissemination of data (e.g., MLS), communications, finances, staff and strategic partnerships
<ul style="list-style-type: none"> Know the importance of obtaining member feedback through various methodologies 	<ul style="list-style-type: none"> Regularly provide status/progress/success reports on strategic or business plans compared with goals to the Board of Directors 	<ul style="list-style-type: none"> Review strategic plans from other associations, including NAR, state and local associations, during the planning and visioning process
<ul style="list-style-type: none"> Learn about and utilize NAR’s planning resources available on www.nar.realtor in the AE Toolkits area, including the REALTOR® Association Models Planning Tool 	<ul style="list-style-type: none"> Communicate plans, goals, and vision to the membership annually, or more frequently, using all relevant association communication channels 	
<ul style="list-style-type: none"> Drawing on the association’s history and culture, plan and implement programs, products, and services that advance the direction determined by the board 		
PRODUCT/PROGRAM DEVELOPMENT		
<ul style="list-style-type: none"> Identify core vs. optional services and determine whether the product/service offering is consistent with association’s mission statement and strategic plan and value proposition 	<ul style="list-style-type: none"> Develop and conduct a member needs assessment to determine products and services needed by membership 	<ul style="list-style-type: none"> Identify and create local strategic alliances shared services, and affinity relationships, if necessary, to deliver association member services

❖ Identify available NAR, state, and local programs and products and communicate the offerings to membership	❖ Develop and conduct member, market, and competitive research to determine if the product/ service is feasible for delivery, including a cost/ benefit analysis	
❖ Assess the impact of a product or program for any association liability, impact on tax status, and staffing	❖ Create a business plan for products/services including the product requirements, rationale, funding and implementation plan	
❖ Periodically re-evaluate association products/ services throughout the product life-cycle	<ul style="list-style-type: none"> Identify the components and benefits of each product/service (including non-dues revenue opportunities) 	
<ul style="list-style-type: none"> Ensure membership is aware of affinity/partner relationships offered by NAR 	<ul style="list-style-type: none"> Identify current/future trends affecting membership and select products/services based on the research and association objectives 	

PROFESSIONAL SERVICES

❖ Understand how to conduct needs analysis for professional services, including cost/budget, purchase vs. lease, length of contract term and renewal, responsible parties, etc.	❖ Identify and develop criteria for the procurement, management, evaluation and termination of professional service relationships: legal counsel, financial consultants and auditors, technical/ computer consultants, et al.	<ul style="list-style-type: none"> Educate legal counsel, financial consultants and auditors, technical/computer consultants, et al., on required local, state and national policies
❖ Understand how to prepare an RFP for potential vendors		<ul style="list-style-type: none"> Know when to consult with legal counsel (e.g., new area of service, any potential liability, review of contract, dispute resolution)
❖ Understand the skills needed for procuring new services, determining contract agreement terms, understanding basic contract language and contract provisions		
<ul style="list-style-type: none"> Identify competent professional service relationships (legal counsel, financial consultants and auditors, technical/computer consultants, management consultants, government affairs/lobbyist or other contractors, building maintenance, marketing and public relations consultants, et al.) and match prospective service providers with the board or association's needs 		

UNDERSTAND THE STRUCTURE OF THE REALTOR® ORGANIZATION WITHIN THE CONTEXT OF THE EVOLVING REAL ESTATE INDUSTRY

Demonstrate the ability to analyze, interpret, and apply REALTOR® association governance, policies, and procedures to understand and work with the governance and structure of the REALTOR® association.

ADMINISTRATIVE LEVEL Understand the fundamental structure of the REALTOR® organization; ensure that association’s governing documents comply with NAR requirements.	MANAGEMENT LEVEL Have an in-depth understanding of NAR policies and procedures, as well as local and state associations; take an active role in the REALTOR® organization.	LEADERSHIP LEVEL Make a difference – contribute to policy formulation and the direction of the REALTOR® organization.
ADVOCACY AND REALTOR® PARTY		
<ul style="list-style-type: none"> ❖ Understand the local, state, and national expectations and goals for Call-For-Action (CFA) rates and REALTOR® Political Action Committee (RPAC) fundraising 	<ul style="list-style-type: none"> ❖ Understand and identify the fundamentals of applying for NAR REALTOR® Party grants, programs and services 	<ul style="list-style-type: none"> ❖ Identify both traditional and non-traditional coalition partners, and ways REALTOR® goals and values align with other organizations, such as real estate industry organizations, housing and finance trade associations, property rights coalitions, workforce and affordable housing organizations and chambers of commerce
<ul style="list-style-type: none"> ❖ Identify information, programs, and data available for REALTOR® voter registration and voting engagement efforts 	<ul style="list-style-type: none"> ❖ Understand evaluating candidates, the candidate interview process and legal requirements for disbursements of PAC checks 	<ul style="list-style-type: none"> ❖ Identify strategies to affect public policies, including utilizing REALTOR® Party programs, services and grants, and other methods to elect REALTOR® friendly candidates; mobilize members when action is needed and to influence in community development decisions
<ul style="list-style-type: none"> ❖ Understand the expectations and directions of the NAR Core Standards Advocacy section 	<ul style="list-style-type: none"> ❖ Coordinate with neighboring associations, the state/local associations, and coalitions on key issues and efforts 	<ul style="list-style-type: none"> ❖ Identify resources available for policy development strategies and support
<ul style="list-style-type: none"> ❖ Be familiar with the resources on realtorparty.realtor; be able to find information about the REALTOR® Political Action Committee (RPAC), political funding, grants, programming and other resources at the local, state, and national levels 	<ul style="list-style-type: none"> ❖ Be intimately familiar with the application process of the various political programs, grants and resources at the local, state, and national levels 	<ul style="list-style-type: none"> • Promote and advance legislation/regulation favorable to the real estate industry at the local, state and national levels
<ul style="list-style-type: none"> ❖ Have connections with government affairs professionals at the local, state, and national associations who administer political and government affairs activities, including PAC legal compliance 	<ul style="list-style-type: none"> ❖ Develop and administer education programs for REALTOR® on political and legislative processes 	<ul style="list-style-type: none"> • Provide resources and training to encourage member involvement in political campaigns
<ul style="list-style-type: none"> • Be able to identify and contact elected/appointed officials and their staff on the municipal, county, state, and federal levels 	<ul style="list-style-type: none"> ❖ Develop and administer programs for monitoring and advocating for government affairs priorities at the local, state, and national level 	<ul style="list-style-type: none"> • Look for opportunities for leadership participation in high visibility, key advocacy communications or statewide advocacy related groups

that represent the association's area		
<ul style="list-style-type: none"> Identify which officials are shared with other local associations and combine resources to maximize access and influence 	<ul style="list-style-type: none"> ❖ Understand the role of the local Government Affairs Director (GAD) and associated responsibilities (monitoring governments, reporting to members, representing the association in public policy development, etc.) 	<ul style="list-style-type: none"> Develop strategies to identify and elect REALTOR® members and other candidates that support real estate issues
<ul style="list-style-type: none"> Understand basic guidance on PAC law compliance for REALTOR® organizations 	<ul style="list-style-type: none"> Organize and promote attendance at the National Association's Legislative Meetings 	
<ul style="list-style-type: none"> Be familiar with the local, state, and national RPAC fundraising levels and contribution methods 	<ul style="list-style-type: none"> Know where to access information to understand the legal requirements of screening candidates 	
<ul style="list-style-type: none"> Locate resources to identify current and past contributions of REALTORS® to RPAC and related PAC/campaign funding programs 		
<ul style="list-style-type: none"> Possess basic understanding of the legislative and regulatory process at all three levels of the association 		
<ul style="list-style-type: none"> Understand the local, state, and national resources and methods to achieve CFA success 		
<ul style="list-style-type: none"> Promote attendance at the state's legislative activities/lobby day 		
GOVERNING DOCUMENTS AND POLICY		
<ul style="list-style-type: none"> ❖ Understand the components of and be able to apply/ comply with the following: Bylaws, NAR Model Bylaws; Constitution; and Articles of Incorporation 	<ul style="list-style-type: none"> ❖ Understand the difference between bylaws (broad statement) and policies (precise statements); understand how and who can modify or amend bylaws and policies 	<ul style="list-style-type: none"> Identify trends and situations that could create a conflict with existing governing documents
<ul style="list-style-type: none"> ❖ Understand and enforce the REALTOR® dues formula 	<ul style="list-style-type: none"> Attend NAR meetings to learn about upcoming changes in bylaws, policies, and/or MLS rules and regulations and present needed changes to the appropriate governing bodies of the association for implementation 	
<ul style="list-style-type: none"> ❖ Know the function and purpose of governing documents, policies, and procedures 		
<ul style="list-style-type: none"> ❖ Maintain governing documents in compliance with NAR policy 		
<ul style="list-style-type: none"> ❖ Be able to obtain approval of governing documents by NAR (a 		

condition of coverage under NAR's Master Professional Liability Insurance Policy)		
❖ Understand and ensure compliance as mandated by the NAR Core Standards		
• Be familiar with the state association's constitution and bylaws and where to access them		
• Know governing MLS rules and regulations (if applicable)		
• Educate volunteer leaders about key documents and policies		
• Periodically review the association's governing documents and policies		
• Determine how often the documents should be revised and the process for revision and approval (Board of Directors/ membership vote, etc.)		
• Understand the roles of volunteer leadership vs. staff responsibilities		
• Educate volunteer leaders on their fiduciary duties pursuant to the association's bylaws and other governing documents		
INSTITUTES, SOCIETIES, AND COUNCILS, AND NAR DESIGNATIONS, CERTIFICATIONS, AND CERTIFICATE COURSES		
❖ Identify the Institutes, Societies and Councils and understand the scope of their respective designations	❖ Identify and assess the need for developing specialty sections or councils (e.g., appraisers, property managers)	• Manage the local chapters of Institutes, Societies and Councils
❖ Identify the various NAR Designations and Certifications and understand their purpose in the marketplace	❖ Know the steps needed to bring a NAR designation or certification course to the association and what resources and support are offered by NAR and the ISCs	• Establish specialty sections/councils and develop programs to meet members' needs
❖ Be aware of programs offered by NAR Academy in partnership with Columbia College	• Identify partnership opportunities when offering designation courses and the potential for non-dues income	• Quantify the value of designations to a member's career
• Be aware of designations outside the REALTOR® family and understand the disclaimers that must be used if offering them	• Promote and/or offer NAR/ISC designation and certification programs to increase the levels of skill and professionalism in the membership	
	• Understand the support provided for education directors at the NAR meeting, online communities, course provider resource pages, and marketing assistance	

	<ul style="list-style-type: none"> • Understand the international reach and referral opportunities via the global networks available to designees and certification holders of NAR and the ISCs 	
	<ul style="list-style-type: none"> • Identify opportunities to collaborate, meet with and join in activities with local chapters of the various ISCs 	
MEMBERSHIP POLICIES AND PROCEDURES		
<ul style="list-style-type: none"> ❖ Understand board of choice (BOC) and how BOC policies apply to other association services: <ul style="list-style-type: none"> ❖ Identify how BOC applies to a designated REALTOR® ❖ Identify how BOC applies to a firm's licensees where the firm's DR belong to different boards/associations and where the firm operates in multi-state markets ❖ Identify the requirement for a REALTOR® (non-principal) to choose an association as primary ❖ Identify how NAR dues formula applies to a DR who holds both primary membership in one association and secondary membership in another ❖ Identify whether a secondary member may receive multiple listing services 	<ul style="list-style-type: none"> • Define who is responsible for policies and procedures 	<ul style="list-style-type: none"> • Understand potential membership issues that could be raised among staff and members
<ul style="list-style-type: none"> ❖ Identify, implement and enforce member policies and procedures, including: <ul style="list-style-type: none"> ❖ types of membership ❖ membership qualification criteria ❖ application process ❖ membership privileges and obligations (including triennial Code of Ethics training requirement) ❖ membership suspension, expulsion or termination 	<ul style="list-style-type: none"> • Educate volunteer leaders on the implications of board of choice 	<ul style="list-style-type: none"> • Ensure the implementation of effective governance structures

<ul style="list-style-type: none"> • Develop and conduct new member orientations as required by NAR 	<ul style="list-style-type: none"> • Review and revise new member orientation curriculum as necessary 	
<ul style="list-style-type: none"> • Understand membership policies and procedures utilizing resources on www.nar.realtor 		
<ul style="list-style-type: none"> • Promote online or in-person Code of Ethics classes that satisfy the NAR Code of Ethics training requirement 		
MLS POLICIES AND DELIVERY OF SERVICES		
<ul style="list-style-type: none"> ❖ Understand the value and purpose of MLS, including ancillary services 	<ul style="list-style-type: none"> ❖ Understand the use of listing content and the enforcement procedures for state and federal regulations, intellectual property rights, and applicable laws (antitrust, copyright, agency) 	<ul style="list-style-type: none"> • Support standardization of MLS industry data as recommended by RESO and NAR
<ul style="list-style-type: none"> ❖ Be able to describe the differences between core, basic and optional services 	<ul style="list-style-type: none"> ❖ Understand the role of MLS policy and license agreements to authorizing the access to and use of MLS data 	<ul style="list-style-type: none"> • Participate in MLS related vendor selections and foster continuing vendor relations
<ul style="list-style-type: none"> ❖ Understand the difference between an MLS subscriber and participant and how their rights/privileges differ 	<ul style="list-style-type: none"> ❖ Understand the unilateral offer of compensation in MLS and the determining factors for procuring cause 	<ul style="list-style-type: none"> • Stay informed of proprietary and license issues, strategic alliances, and their ramifications
<ul style="list-style-type: none"> ❖ Understand the different MLS operational structures (committees, corporations and regional entities) and the NAR MLS policies and model documents 	<ul style="list-style-type: none"> ❖ Understand the potential benefits of MLS regionalization, cooperative, and reciprocal agreements 	<ul style="list-style-type: none"> • Understand intellectual property and privacy issues related to MLS databases
<ul style="list-style-type: none"> ❖ Understand listing content management and distribution including ownership (copyright vs. license) and authorized displays and possible uses of MLS data by participants, subscribers, and others including IDX, VOW, syndication, aggregation and other service vendors 	<ul style="list-style-type: none"> ❖ Develop and implement policies regarding data feeds for subscribers, participants, and third-parties 	<ul style="list-style-type: none"> • Monitor and understand external market influences and industry trends to identify future innovators
<ul style="list-style-type: none"> ❖ Understand NAR Model MLS Rules and their impact on MLS services and delivery and ensure policies are in compliance with NAR MLS policies and model documents 	<ul style="list-style-type: none"> ❖ Develop and implement policies regarding the public distribution and use of MLS statistics 	<ul style="list-style-type: none"> • Explore new MLS products and services
<ul style="list-style-type: none"> ❖ Understand the value and functions of RESO, data dictionary, WEB API, and industry data standards 	<ul style="list-style-type: none"> • Develop guidelines for data management access and protection, ownership/copyright violations, including appropriate steps for enforcement 	
<ul style="list-style-type: none"> ❖ Enforce NAR MLS Rules and Regulations, including the NAR MLS Antitrust Compliance Policy 	<ul style="list-style-type: none"> • Understand MLS/association management systems to 	

	communicate, integrate and deliver MLS services	
<ul style="list-style-type: none"> Offer ongoing MLS training sessions 	<ul style="list-style-type: none"> Understand the need to share “publicly marketed” listing information and to promote the client’s interests 	
<ul style="list-style-type: none"> Understand the use of MLS data, both confidential and public 	<ul style="list-style-type: none"> Analyze and periodically review third-party licensing agreements to ensure data security and integrity 	
PROFESSIONAL STANDARDS		
❖ Know components of the Code of Ethics, the NAR Handbook on Multiple Listing Policy, and the Code of Ethics and Arbitration Manual	❖ Promote and explain the benefits of the dispute resolution system for buyer and seller (DRS)	❖ Promote the benefits of the mediation process as compared to the arbitration process
❖ Be able to explain the duties of the REALTOR® under the Code of Ethics and how they apply to his/her daily business	❖ Understand the optional sections in the NAR Code of Ethics and Arbitration Manual that may be adopted at the discretion of the association	❖ Promote the benefits of the ombudsman process compared to the ethics process and the arbitration process
❖ Describe the general steps for processing an ethics complaint and for processing an arbitration request (including who is eligible to file and the differences between an ethics complaint and an arbitration request)	❖ Understand the options available to REALTOR® associations to expedite complaints – fast track processing, ethics mediation, citation policy, anonymous complaints, expedited administrative ethics procedures	<ul style="list-style-type: none"> Understand areas of the Code of Ethics that are inconsistent with state law/regulations and inform members
❖ Know the role and scope of the Grievance Committee, Professional Standards Committee and the Board of Directors in conducting ethics hearings, arbitration hearings and appeal hearings	❖ Understand sanctioning guidelines (Appendix 7 VII, Part 4) and the principles of progressive discipline	
❖ Understand and enforce NAR’s Code of Ethics training requirements	<ul style="list-style-type: none"> Apply mediation techniques learned by participating in mediation training 	
❖ Understand and enter into a cooperative enforcement agreement	<ul style="list-style-type: none"> Complete Professional Standards Advanced Administrative Concepts Self-Study course 	
❖ Understand NAR’s REALTOR® Association Dispute Resolution Process	<ul style="list-style-type: none"> Provide training for Grievance and Professional Standards Committees 	
❖ List the basic principles of due process and how they apply to administrative timelines and the role of the Association Executive to ensure parties a fair and impartial hearing	<ul style="list-style-type: none"> Understand the importance of cross-training association employees in professional standards to provide a consistent level of member service 	
❖ Understand the differences between mandatory and voluntary arbitration	<ul style="list-style-type: none"> Involve legal counsel in professional standards enforcement as needed 	

❖ Know the elements of an ethics decision including: (1) clearly articulated findings of facts that support the conclusion and are reasonably applicable to the cited articles (2) progressive discipline and (3) use Declaratory Relief when appropriate		
❖ Understand what a REALTOR® association may publish about a member found in violation of the Code of Ethics		
❖ Promote and explain the benefits of mediation		
❖ Promote and explain the benefits of the ombudsman service		
❖ Understand both employee and member roles in the observance of confidentiality		
❖ Understand who must be disqualified/excused from any tribunal considering a professional standards matter		
❖ Understand the NAR Core Standards that apply to professional standards		
❖ Understand the relationship between REALTORS® on the various tribunals, and their roles compared to the AEs in the professional standards process		
<ul style="list-style-type: none"> • Complete state and NAR professional standards training, such as the Certified Professional Standards Administrator Course; stay up to date with changes to PS procedures and policies. Where possible complete state or regional training, if available and, if a NAR Certified PS Administrator 		
<ul style="list-style-type: none"> • Ensure that the members of the Professional Standards Committee understand the basic definition of procuring cause 		
<ul style="list-style-type: none"> • Review the Code of Ethics and Arbitration Manual (CEAM) with the members of the Professional Standards Committee and acknowledge any conflicts with state law 		
<ul style="list-style-type: none"> • Promote an environment of camaraderie among competitors 		

<ul style="list-style-type: none"> Promote the professional standards process as an equitable means of dispute resolution and to promote professionalism 		
<p>FOSTER EFFECTIVE INTERPERSONAL RELATIONSHIPS</p> <p>Demonstrate the ability to accomplish objectives through effective relationships and partnerships with a variety of internal and external constituencies and coalitions; integrate social, organization, and technological considerations to implement the most effective structures and processes; effectively manage and work with staff and volunteers and to develop effective coalitions.</p>		
<p>ADMINISTRATIVE LEVEL</p> <p>Build an internal and external network of professional resources for the association.</p>	<p>MANAGEMENT LEVEL</p> <p>Plan and implement alliances and partnerships in the community; become a credible source for real estate issues in the community.</p>	<p>LEADERSHIP LEVEL</p> <p>Take the lead in developing strategic alliance relationships – coordinate efforts, build coalitions, seek out a leadership role at NAR; shape and develop future leaders; serve as a mentor.</p>
<p>WORKING WITH EXTERNAL ORGANIZATIONS</p>		
<ul style="list-style-type: none"> Identify and use NAR grants (Smart Growth Action Grants, Commercial Innovation Grants, Diversity Initiative Grants, Placemaking Grants, etc.) 	<ul style="list-style-type: none"> Encourage and foster partnerships with other local real estate industry groups (e.g., Homebuilders Association, Mortgage Bankers Association, local bar association, commercial real estate groups, chambers of commerce, community building and economic development groups, local colleges, technical schools, county and city commissioners, local school systems, local elected officials, service clubs) 	<ul style="list-style-type: none"> Encourage and foster partnerships toward shared goals with the local chapters of other real estate associations (e.g., AREAA, NAHREP, NAREB, FIABCI)
<ul style="list-style-type: none"> Encourage and foster partnerships within the REALTOR® family - with NAR, the state association, and other local REALTOR® associations such as YPN, Equal Opportunity-Cultural Diversity, Green-Smart Growth, etc.) 	<ul style="list-style-type: none"> Identify the value for members in participating in these partnerships 	<ul style="list-style-type: none"> Encourage and foster partnerships with business specialties - (CCIM, Global, Resort & Second Home, Appraisal, Auction, Association Management, Brokers, Buyer Representative, Green, Short Sales and Foreclosures, Senior Market, Land
<ul style="list-style-type: none"> Develop a planning document for collaborative efforts with other organizations using collaboration planning tools 	<ul style="list-style-type: none"> Become involved in relevant NAR and state committees 	<ul style="list-style-type: none"> Provide networking opportunities among groups to share mutual knowledge and information
<ul style="list-style-type: none"> Share results of collaborations with leadership and membership 		<ul style="list-style-type: none"> Become a leader by chairing NAR committees and work groups
<ul style="list-style-type: none"> Understand how collaboration with external organizations meets the goals and expectations of NAR Core Standards 		<ul style="list-style-type: none"> Consider partnerships such as: <ul style="list-style-type: none"> Combining statistics press releases with mortgage bankers, home builders, and commercial brokers Working with local bar associations on forms and training for members

		<ul style="list-style-type: none"> • Sharing networking events to introduce members to the leadership of external organizations. • Getting association committees involved with external organizations as appropriate (i.e., Young REALTORS® Network could be working with a local Young Professionals Network; Legislative Advocacy Committee could be working with the Chamber or business groups on shared legislative priorities; Professional Development/Education Committee could be partnering with local high schools, colleges or technical schools to share knowledge on the real estate industry and the benefits of home ownership) • Identify instructors to teach certain topics to members
--	--	---

WORKING WITH VOLUNTEERS

❖ Understand the role of leadership, volunteers and staff	❖ Develop programs to recruit, recognize, and retain volunteers	❖ Understand, and accommodate different leadership styles, personality types, generational and motivational preferences
❖ Understand the differences between committees, and task forces/work groups	❖ Understand and accommodate volunteers’ generational and motivational preferences	• Develop an inclusive leadership recruitment program that reflects the diverse makeup of an association’s geographic area and membership
❖ Implement an annual call for volunteer leaders	❖ Provide access to a leadership training program that ensures the most qualified individuals are leading officer and director orientation	• Identify member candidates for state and national leadership training programs or academies
❖ Identify training and other opportunities for volunteers to develop their leadership skills	• Determine the necessary competencies and experience needed to be an association officer/leader	• Mentor and promote outstanding volunteers for higher positions within the REALTOR® family
❖ Provide access to training and develop effective committee and work group leaders	• Develop systems to ensure successful volunteer/ staff collaboration	• Align volunteer input with the needs and goals of the association
• Ensure that volunteer leaders have a detailed understanding of association policies and that they are in compliance with such policies	• Partner with leaders to craft work plans to achieve association goals that include strategic plans	

<ul style="list-style-type: none"> Recognize volunteer efforts 	<ul style="list-style-type: none"> Anticipate and implement measures to ensure leadership continuity 	
<ul style="list-style-type: none"> Educate volunteers on how to act in the best interest of the association 		
<ul style="list-style-type: none"> Obtain feedback from volunteers regarding their experiences and use the feedback to enhance future interactions 		
<ul style="list-style-type: none"> Train volunteers how to act in best interest of the organization 		
<ul style="list-style-type: none"> Foster relationships of trust and inclusiveness between members and staff 		

UNDERSTAND REAL ESTATE ISSUES AND TRENDS

Understand the diverse issues that foster a successful real estate operation, as well as the forces that are shaping the industry; manage these changes to ensure an environment that puts the REALTOR® at the center of every real estate transaction; analyze and affect the impact of issues and trends in the industry.

ADMINISTRATIVE LEVEL

Possess a basic understanding of the real estate industry – functions of an agent, broker, firm; understand members and their business in your market area.

MANAGEMENT LEVEL

Develop a working knowledge of real estate license laws and real estate firm operations; focus more on the industry and industry trends; develop working relationships with your organization’s internal and external constituents.

LEADERSHIP LEVEL

Identify critical issues and trends before they impact the members; build trust and confidence in the association and its members.

DIVERSITY, EQUITY AND INCLUSION

<ul style="list-style-type: none"> ❖ Be knowledgeable about the many types of diversity (age, gender, racial and ethnic background, etc.) in local markets, in the membership and in association leadership 	<ul style="list-style-type: none"> ❖ Communicate demographic trends, statistics, the value of inclusion, and ideas to the membership and leadership 	<ul style="list-style-type: none"> • Promote coalition building in the real estate industry, including internal and external partners
<ul style="list-style-type: none"> ❖ Identify the purposes of NAR’s Leading with Diversity workshop and Diversity Grants 	<ul style="list-style-type: none"> ❖ Identify and promote community outreach programs, leadership development programs, and mentoring programs for diversity 	
<ul style="list-style-type: none"> ❖ Understand and communicate the importance of meeting the association’s goals of structuring the Directors/ committees to be inclusive and reflect the diverse membership 	<ul style="list-style-type: none"> • Identify sources of information on local and state association global business councils and local chapters of multicultural real estate organizations and how to work with each 	
<ul style="list-style-type: none"> • Identify sources of information on demographics in the community, the market, and the membership, and general trends in the industry 		
<ul style="list-style-type: none"> • Identify potential leaders representing diverse cultures, experiences and demographics, remembering to look at any local multi-cultural organizations 		

FAIR HOUSING		
❖ Be knowledgeable about federal, state, and local fair housing laws, types of potential violations and the consequences, and where complaints may be filed	❖ Incorporate fair housing issues into education programs	• Develop coalitions and working relationships with key community organizations, leaders, and multicultural real estate organizations
❖ Understand the importance of and the application of Article 10 of the Code of Ethics	• Develop or provide fair housing programs and forums for consumer education and other public venues	
❖ Promote the principles of fair housing	• Understand the association's role in promoting leadership on fair housing practices	
❖ Develop regular fair housing communications to members		
❖ Be familiar with NAR fair housing resources and grant opportunities to support local initiatives		
❖ Understand how fair housing laws, including those relating to advertising, are enforced in the community		
❖ Educate members on fair housing testing and its implications		
• Locate and become familiar with available fair housing materials provided by the REALTOR® organization and local and state fair housing groups for members and the public		
GENERAL REAL ESTATE PRACTICES		
❖ Know the basics of real estate contract law	❖ Be knowledgeable of real estate office employment issues	• Promote the association as the preferred forum for seeking solutions to common industry challenges
❖ Understand license law and regulations; identify agencies that regulate licensees	❖ Understand broker/agent relationships	• Be recognized as the source for general real estate information in the community
❖ Understand the liabilities inherent in real estate activities (e.g., misrepresentation, negligence)	• Understand ancillary services (e.g., mortgage, title)	• Identify the impact of internal and external issues and trends on the business of broker/owners and agents
❖ Be knowledgeable of disclosure requirements and related documentations to reduce liability (e.g., Megan's Law, stigmas)	• Understand the rules governing personal assistants	
❖ Understand basic listing/sales procedures, and terminology	• Understand fiduciary and non-fiduciary roles and responsibilities of licensees in facilitating a transaction	
❖ Describe the difference between Exclusive Right to Sell		

and Exclusive Agency agreements		
❖ Understand independent contractor status and brokerage models		
❖ Have a basic understanding of agency, agency relationships and agency disclosures		
❖ Have a general understanding of basic real estate forms, particularly those offered by the local and state associations and ensure forms are regularly updated		
❖ Have a general understanding of TRID (TILA/RESPA Integrated Disclosures)		
❖ Identify NAR resources for brokers		
❖ Be knowledgeable of record-keeping requirements for real estate practitioners		
❖ Understand privacy laws (Do-Not-Call/Fax, Can Spam, etc.) as they pertain to real estate		
• Be knowledgeable of all continuing education requirements and resources for real estate practitioners		
GLOBAL		
❖ Be knowledgeable about the cultural diversity (racial and ethnic background, languages spoken, etc.) within the local market in the membership and in association leadership	❖ Raise awareness of NAR Global Programs and services to share with members in addition to awareness of the Global Achievement Program	❖ Understand your role as a leader in connecting your association with economic development groups or local government entities to be sure the real estate industry is part of the larger discussions on foreign direct investment opportunities in your state
• Identify sources of information on global investment research	❖ Identify and promote community outreach programs, leadership development programs, and mentoring programs for global	• Promote coalition building in the real estate industry, including internal and external partners
• Be knowledgeable about available global education	• Identify sources of information on local and state association global business councils and local chapters of multicultural and global real estate organizations and how to work with each	
	• Identify and promote community outreach programs, leadership development programs, and mentoring programs for global	

	<ul style="list-style-type: none"> • Communicate global trends, statistics, and ideas to the membership and leadership 	
REAL ESTATE ISSUES AND TRENDS		
<ul style="list-style-type: none"> ❖ Work with leadership and volunteers to identify the industry's major member/broker liability issues 	<ul style="list-style-type: none"> ❖ Have a working knowledge of the basic economics of prevailing real estate brokerage business models (e.g., split commission, 100% commission, limited service) and their impact on members 	<ul style="list-style-type: none"> ❖ Identify, evaluate and develop action plans to address emerging real estate issues and trends
<ul style="list-style-type: none"> ❖ Understand the day-to-day operations of real estate practitioners 	<ul style="list-style-type: none"> ❖ Understand trends affecting the transfer and ownership of real estate; this includes funding, document processing, title and escrow, and taxes 	<ul style="list-style-type: none"> ❖ Understand how the rapid evolution of technology impacts deliverables (products and services) of associations and MLSs
<ul style="list-style-type: none"> ❖ Understand the types of government regulation impacting real estate brokerage, licensing and educational requirements 	<ul style="list-style-type: none"> ❖ Understand regulations affecting the ownership and transfer of real estate, fair housing, and diversity 	<ul style="list-style-type: none"> ❖ Stay informed about social, political, technology and demographic trends and how those trends affect the real estate market and the business activity of members
<ul style="list-style-type: none"> • Be aware of business issues affecting brokers and agents, including safety, data privacy, etc. 	<ul style="list-style-type: none"> • Understand the dynamics of competing interests in the brokerage business and their impact on the association 	<ul style="list-style-type: none"> ❖ Develop a leadership pipeline that accommodates changing member demographics and real estate business trends
<ul style="list-style-type: none"> • Recognize and respond to trends in association management, such as membership increases/decrease, membership demands, communication trends, service trends, dues and pricing structures, and related demographics 	<ul style="list-style-type: none"> • Understand the current regulatory and legislative environment and how changes in major regulations or laws could affect the real estate industry 	<ul style="list-style-type: none"> ❖ Analyze the impact of changing consumer demands and demographics and provide direction to members and the association
<ul style="list-style-type: none"> • Provide/develop safety education programming for association members 	<ul style="list-style-type: none"> • Effectively communicate relevant information about the economic and policy environment to members 	<ul style="list-style-type: none"> ❖ Be knowledgeable about consumer demands and trends affecting the real estate transaction, including competitive entities and services to REALTORS[®], such as FSBOs, third party aggregators, syndication, energy and green, MLS services and potential replacements, and related technologies
<ul style="list-style-type: none"> • Be familiar with paperless transactions and their impact on the real estate industry 	<ul style="list-style-type: none"> • Identify collaborative opportunities to effectively and efficiently serve members in the communities where they live, work, and play 	<ul style="list-style-type: none"> • Develop methodologies to anticipate changes or possible changes to the economy and the regulatory and legislative environment that could impact the business of real estate
		<ul style="list-style-type: none"> • Work with volunteer and community leadership to understand the economic and political nuances of local communities; establish the

		association as a strategic resource and a champion of support/change
		<ul style="list-style-type: none"> Assess and forecast the economy's impact on the real estate business
		<ul style="list-style-type: none"> Provide programs to assist and educate practitioners engaged in specialty real estate
COMMUNICATE VALUABLE INFORMATION Identify, acquire, interpret, and communicate valuable information to association members and external audiences; market programs and services that meet member needs; use knowledge, skills, and technological tools to achieve desired results; relate information from outside sources to support members in their day-to-day business.		
ADMINISTRATIVE LEVEL Identify appropriate communication channels and use them effectively to gain and disseminate information.	MANAGEMENT LEVEL Identify and analyze valuable information, and communicate its impact; manage comprehensive public relations and outreach programs to build the association's image in the community.	LEADERSHIP LEVEL Become a trusted and sought-after source of valuable information for the public, the media and affiliated professionals; master communication methods to collect and disseminate "knowledge"; develop a comprehensive member communications program.
COMMUNICATIONS		
❖ Utilize effective listening skills	❖ Ensure staff effectively learns and uses print, email, web, social media, and video communication channels	❖ Analyze current online communication channels and develop a comprehensive platform that includes design, data security, e-commerce features, and methods to drive traffic to the site(s)
❖ Utilize appropriate business writing skills for various communications, such as scripts, social media posts, speeches, blogs and articles	❖ Understand and adhere to copyright privacy and trademark laws	<ul style="list-style-type: none"> Research and utilize emerging communication technologies, such as mobile and team chat applications
❖ Ensure president, president-elect and association staff subscribe to relevant NAR communication vehicles, such as newsletters, magazines, blogs, podcasts, The Hub, and social media groups	❖ Implement a process to respond to feedback on social media platforms and other online channels	
<ul style="list-style-type: none"> Effectively communicate programs, products, services, and association initiatives through written, verbal, and multi-media or digital channels 	<ul style="list-style-type: none"> Work with volunteers to create and implement a communications plan, including the process, frequency, and delivery of messages 	
	<ul style="list-style-type: none"> Determine and assess the most important messages to communicate with members, and the best delivery method for the message 	
	<ul style="list-style-type: none"> Survey membership audiences to determine communication effectiveness. Capture data 	

	related to member inquiries and analyze for best communication practices	
	<ul style="list-style-type: none"> Seek out public speaking engagements for designated spokespersons to promote the association's value 	
	<ul style="list-style-type: none"> Ensure an effective communication platform and policies are in place establishing best practices for social media, text messaging, videoconferences, etc. 	

EDUCATION

❖ Develop and maintain effective education program record keeping and administration	❖ Identify delivery systems and explore cost-effective sources	❖ Conduct education needs assessments based on member demographics and industry trends
❖ Understand and utilize educational resources available through the NAR family of REALTOR® organizations	❖ Be able to negotiate instructor fees and expenses, room rental, and other costs of providing educational courses	❖ Develop the association's overall value proposition for education, and its long-term impact on the association budget
❖ Work with state and neighboring associations, as well as local members, to present training programs	❖ Determine course fees based upon a cost analysis	<ul style="list-style-type: none"> Identify, encourage, and budget for professional development of the association staff
<ul style="list-style-type: none"> Understand the process for course approval, including understanding the continuing education requirements for each state 	❖ Develop an annual education plan with corresponding budget	<ul style="list-style-type: none"> Develop a comprehensive education strategy that meets the needs of members, staff, and the public
	<ul style="list-style-type: none"> Evaluate possible new course offerings or instructors to meet the needs and wants of the members 	
	<ul style="list-style-type: none"> Develop an effective evaluation process for each educational offering, establish metrics, assess each and compile a summary for evaluation and planning purposes 	
	<ul style="list-style-type: none"> Identify and promote the value and benefit of education to the membership and the need for quality education to ensure improvements in the industry 	
	<ul style="list-style-type: none"> Utilize or develop curriculum with instructional objectives 	
	<ul style="list-style-type: none"> When appropriate, provide instructor training and identify other available training opportunities 	

MARKETING

❖ Understand the concepts of marketing and selling, and be able to define the differences	❖ Identify the association's target audiences, and be able to customize a marketing plan to accommodate preferred methods of communication and maximize engagement (e.g., text, social media, radio, billboard, newspaper, newsletter)	❖ Define strategic intent, establish standards of success, specify marketing goals, and be able to measure and evaluate results
❖ Understand the value of the REALTOR® brand, its relationship to the association and ensure the brand is marketed consistently	❖ Understand the latest marketing methods and techniques and incorporate them into various platforms	• Identify the budget and timeline, as well as any outside resources necessary to implement marketing strategies
❖ Communicate the association's value proposition to members in terms of real benefits (what's in it for them)	❖ Conduct needs assessments to identify market opportunities	• Review, assess, and share results regarding the effectiveness of association marketing strategies
❖ Understand how technology changes marketing approaches ➤ Be familiar with social media do's and don'ts ➤ Comply with copyrights and licensing rules	❖ Understand and evaluate marketing processes, functions and applications	
	❖ Leverage segmentation in marketing campaigns to personalize the member experience and increase relevancy within the organization	
	• Identify programs and objectives and develop marketing plans for each	
	• Promote tangible and intangible member services effectively	
	• Coordinate staff and leadership communications to ensure a consistent message	
PUBLIC RELATIONS PROGRAMS		
❖ Utilize the public relations tools provided by NAR and the state association	❖ Develop and maintain a media relations plan	❖ Develop and communicate the vision for the public relations strategy to both staff and leadership
• Develop a spokesperson policy regarding communications with local media	❖ Define and understand public relations and the differences between PR and publicity	❖ Develop and implement an effective strategic public relations and related communication plan
	❖ Create a strategy for a public relations program that promotes REALTOR® value and positions the REALTOR® organization as the recognized resource for real estate information within the community	• Speak as the "Voice for Real Estate" within the community, to members and the public, as mandated by the NAR Core Standards
	❖ Determine what content is relevant and newsworthy	• Build strong relationships with media professionals who are in a

	(articles, photos, videos, blogs) to various media outlets	position to provide coverage for the association
	❖ Develop consumer outreach programs using NAR Core Standards guidelines	<ul style="list-style-type: none"> Establish communications policies, including appointed media spokespersons, frequency of member communications, and a plan for members to communicate about the association's value initiatives
	<ul style="list-style-type: none"> Implement a spokesperson training program for staff and volunteer leadership to effectively deliver consistent, positive messages 	<ul style="list-style-type: none"> Create opportunities to mentor upcoming leaders (staff and volunteer) with regard to both leadership and communications skills
	<ul style="list-style-type: none"> Measure and assess the effectiveness of public relations activities before, during and after a campaign or event 	
	<ul style="list-style-type: none"> Develop and publish relevant real estate statistics and articles for news media to highlight the value of the local REALTOR® association 	