

2023 Association Profile

August 2023





2023 NAR Leadership Team

2023 Association Profile

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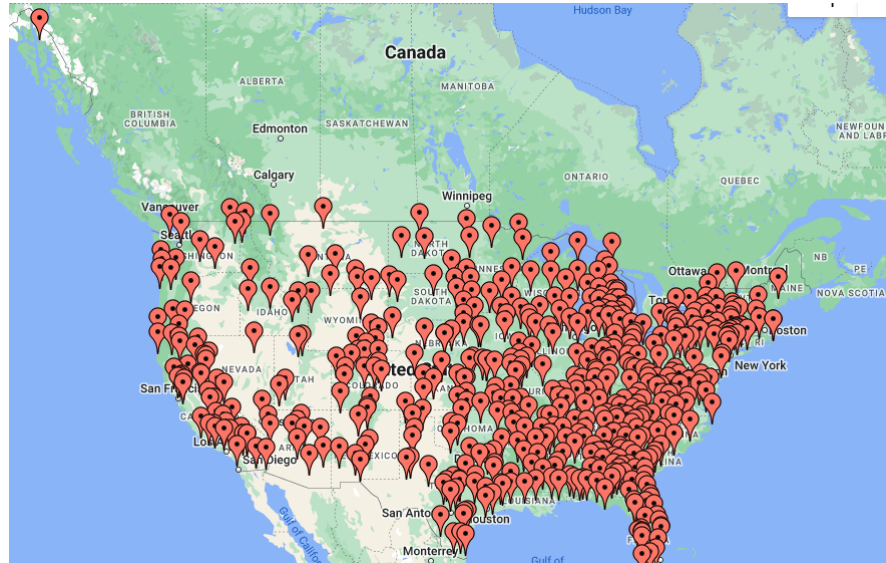
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Introduction

The Association became the largest trade association in the United States in the early 1970s, with over 400,000 members in 1975. Today, the National Association of REALTORS® has over 1.5 million members, 54 state associations (including Guam, Puerto Rico, and the Virgin Islands), and more than 1,000 local associations. With varying sizes, markets, members, and resources, different associations have different priorities and policies. The purpose of this report is to serve as a reference guide of best and common practices for Association Executives and staff members nationwide.

The report is broken down by size of association, determined by NAR's predetermined categories: Mega, Large, Medium, and Small. More details about the association size definition can be found in the Methodology section.



Key Highlights

With a network of more than 1,000 local associations and 54 state associations, it is important to understand commonalities and differences and to understand best practices. With varying sizes, resources, and local markets, let's take a look at how REALTOR® associations operate and compare to each other:

Associations Overview

- **Many local REALTOR® associations are smaller in size: 74 percent represent fewer than 2,000 members each.**
- Seventy-four percent of associations fully own their local MLS, while twelve percent are shareholders of their local MLS.
- Thirty-eight percent of associations' MLSs allow non-REALTOR® participation.

Staff Characteristics

- Associations are most likely to at least employ an Association Executive/CEO (94 percent). Many REALTOR® associations also employ a Membership Director, Government Affairs Director, Education Director, and Communications Director.
- Twenty-two percent of associations share staff and services with other REALTOR® associations to conserve and optimize resources.
- **The typical REALTOR® association employs three full-time staff members and one part-time staff member.**

Benefits

- While this varies by association size, the most common benefit offered to full-time staff is paid vacation time off (89 percent), followed by paid sick time (78 percent), bonuses (68 percent), and health insurance (58 percent).
- **Fourteen percent of associations offer health plans to their REALTOR® members.**

Rules & Guidelines

- **Associations are most likely to have a social media policy or guidelines for staff (87 percent) and least likely to have these for members (35 percent).**
- REALTOR® associations are most likely to have a conflict-of-interest policy (95 percent), followed by a whistle-blower policy (81 percent), and a social media policy (65 percent).
- Among associations with a social media policy, violations are most likely dealt with on a case-by-case basis.

Key Highlights

Financial & Operations

- **REALTOR® associations most often maintain financial reserves for a 1–2-year timeline (39 percent), followed by a 6-month – less than 1-year timeline (33 percent).**
- The most common non-dues revenue sources of REALTOR® associations are penalties through late fees (64 percent) and CE courses (63 percent), followed by affiliate programs and the local MLS.
- Associations primarily (85 percent) conduct dues billing on an annual basis, where all members are charged at the same time.
- **Nearly three-fourths of REALTOR® associations (72 percent) owned their buildings pre-COVID and still own them.**

Offerings & Courses

- Nearly all (94 percent) associations have an award program for REALTOR® of the Year, while more than half (54 percent) have an awards program for service/community/charitable actions.
- **Nearly one-fifth (19 percent) of REALTOR® associations have a commercial division, group, or committee. Only five percent have a commercial overlay board, while 77 percent have neither.**

- REALTOR® associations most often participate in advocacy efforts for fair housing (85 percent), property rights (80 percent), and housing affordability (73 percent).
- **The typical REALTOR® association offers 12 continuing education courses and 20 total classes.**

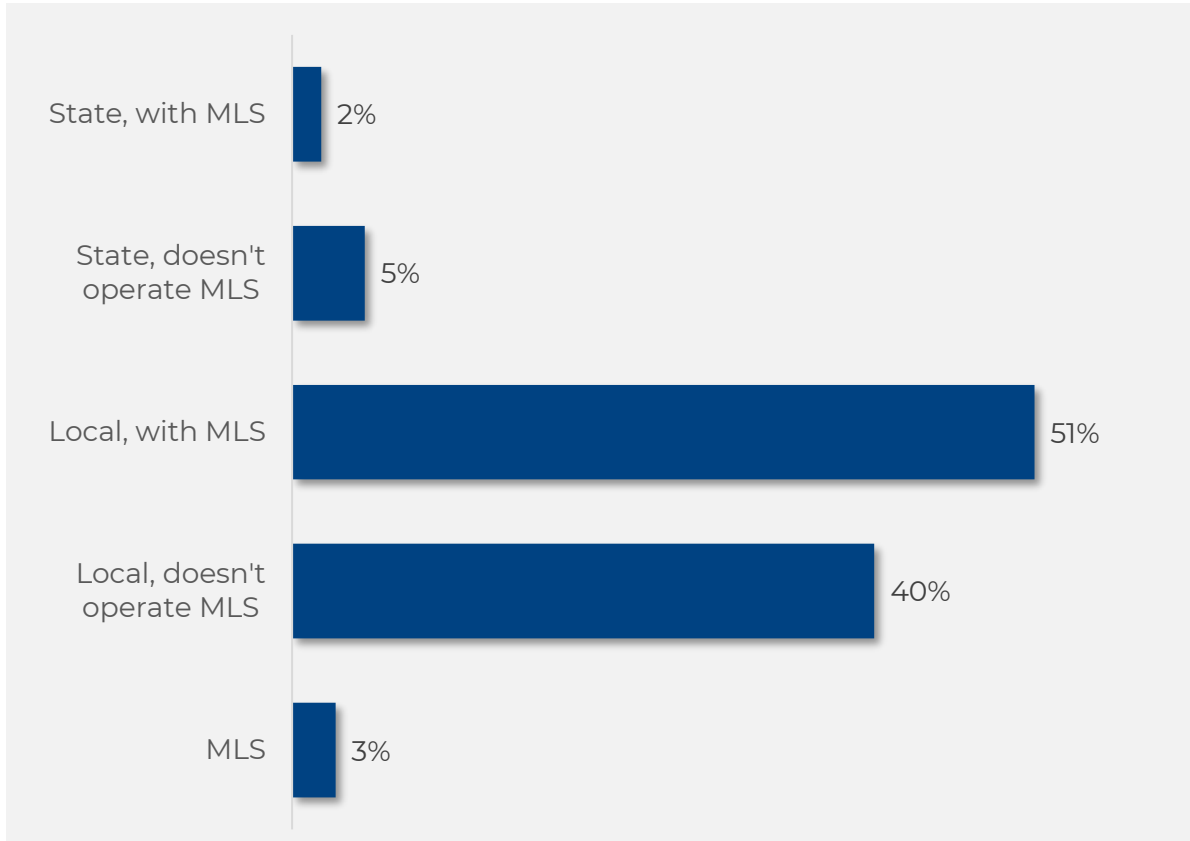
Governance/Board of Directors

- **More than half (56 percent) of REALTOR® associations use virtual voting for governance meetings.**
- REALTOR® associations are most likely (38 percent) to have a three-year term limit for their board members.
- The most common criterion for Board of Directors participation among REALTOR® associations is a minimum tenure as a member of the association (52 percent), followed by a minimum tenure on committee(s) (41 percent).



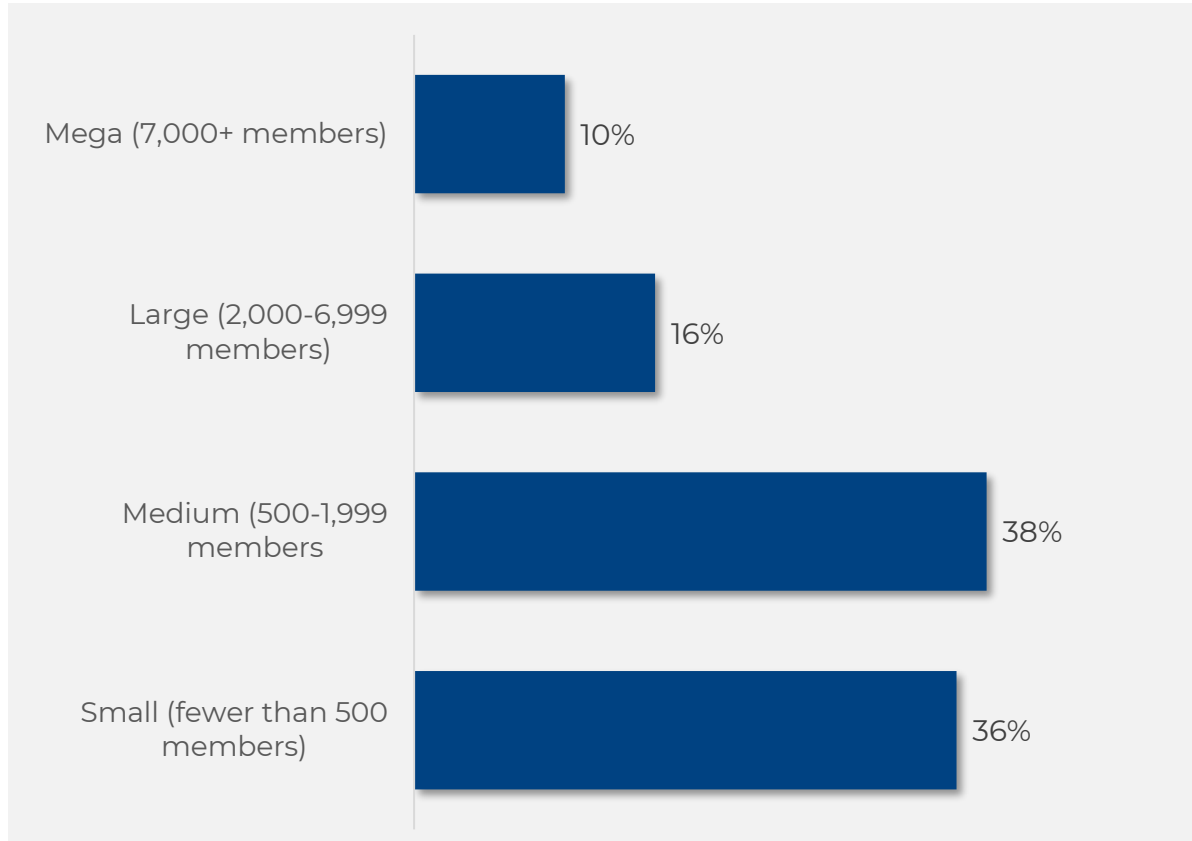
Associations Overview

Association Type



Fifty-one percent of respondents represent a local REALTOR® association with an MLS, while 40 percent represent a local association that doesn't operate their local MLS.

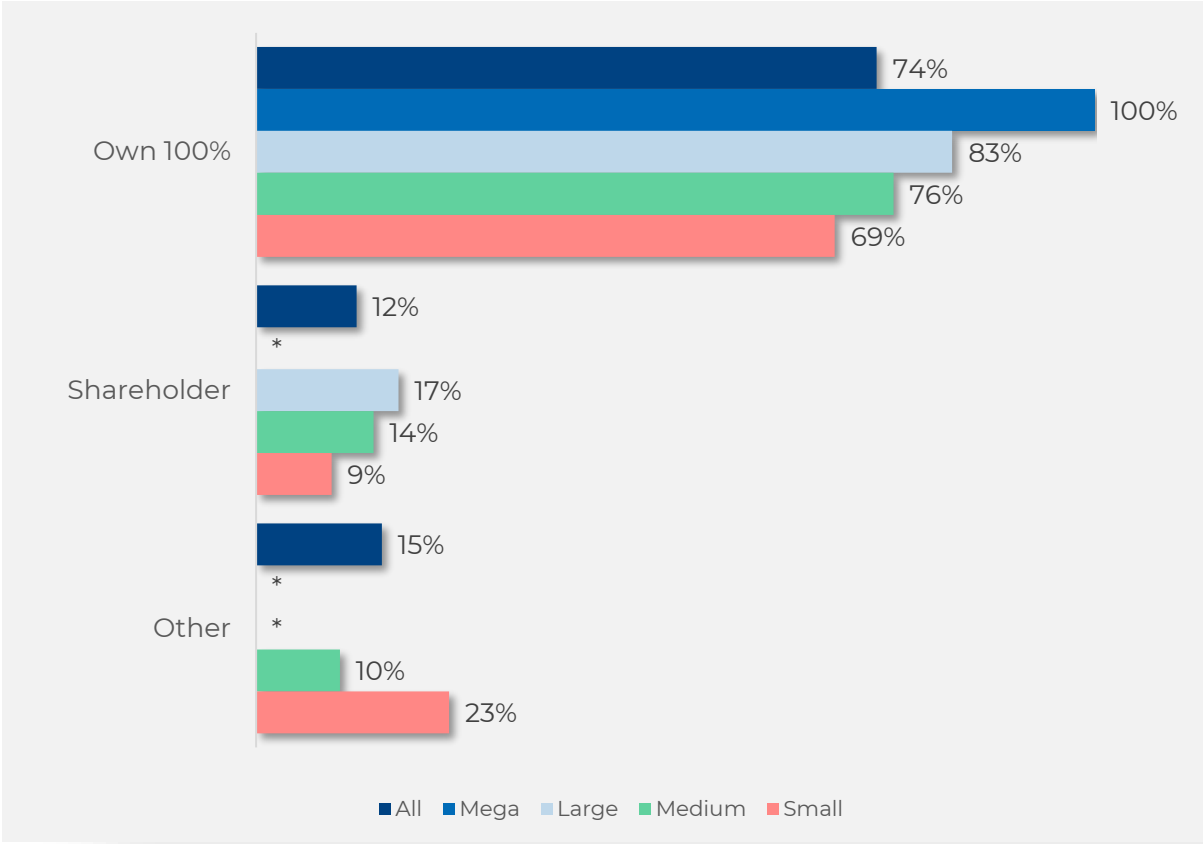
Association Size



Many local REALTOR® associations are smaller in size: 74 percent represent fewer than 2,000 members each.

Thirty-eight percent of respondents represent Medium associations, 36 percent represent Small associations, 16 percent represent Large associations, and 10 percent represent Mega associations.

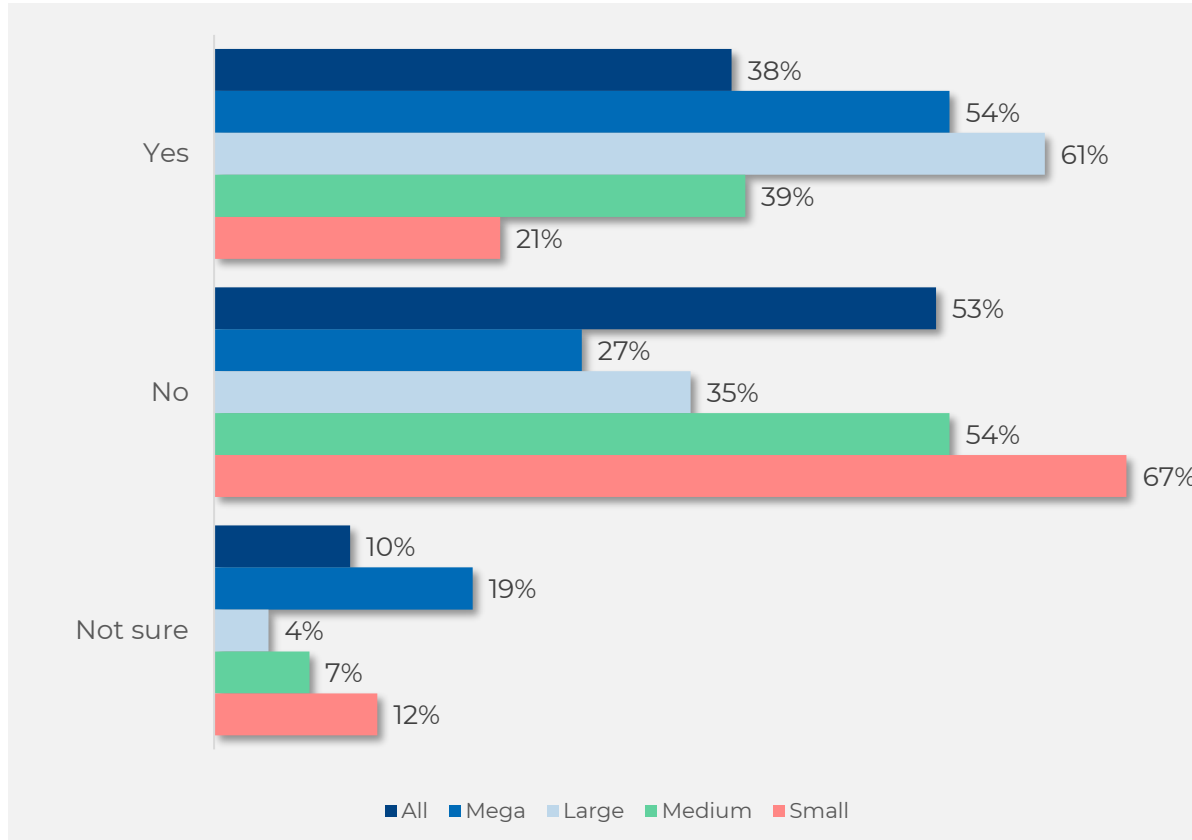
MLS Ownership of Associations



Seventy-four percent of associations fully own their local MLS, while twelve percent are shareholders of their local MLS.

It is much more common for larger associations to own their local MLS fully.

MLS Allows Non-REALTOR® Participation



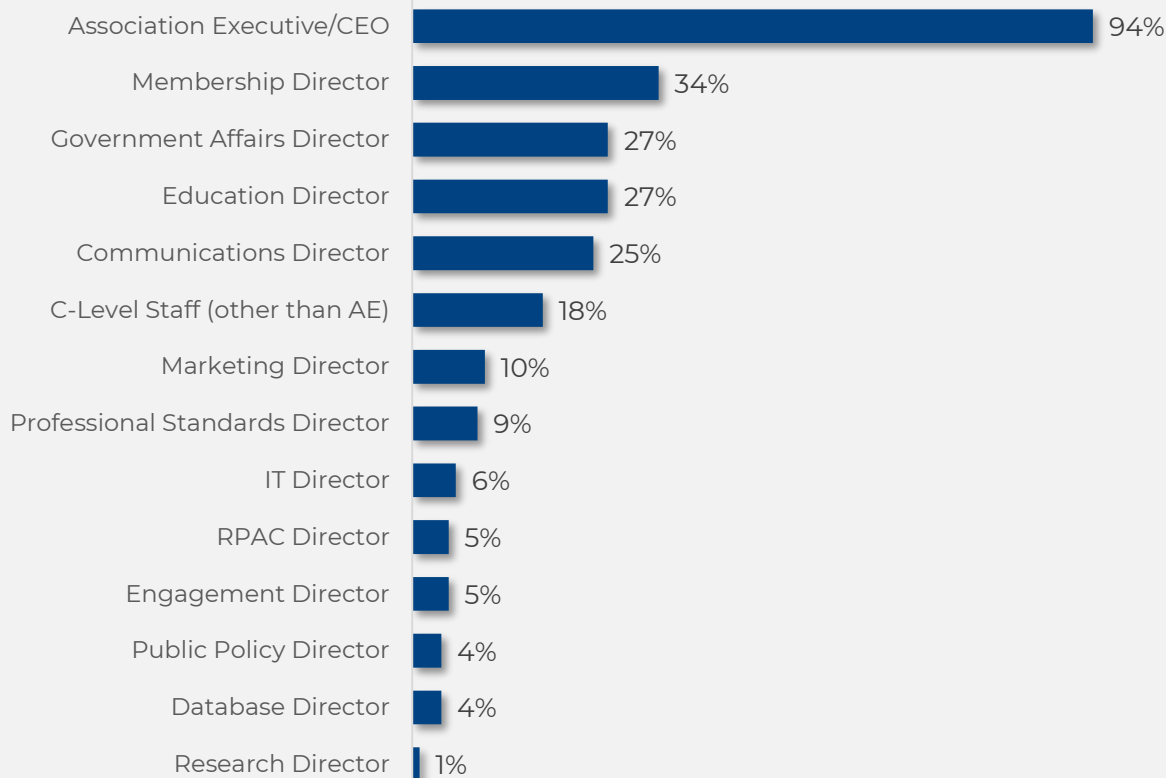
Thirty-eight percent of associations' MLSs allow non-REALTOR® participation.

This is most common among Large associations (61 percent) and least common among Small associations (21 percent).

Staff Characteristics



Executive/Director Level Roles at Association



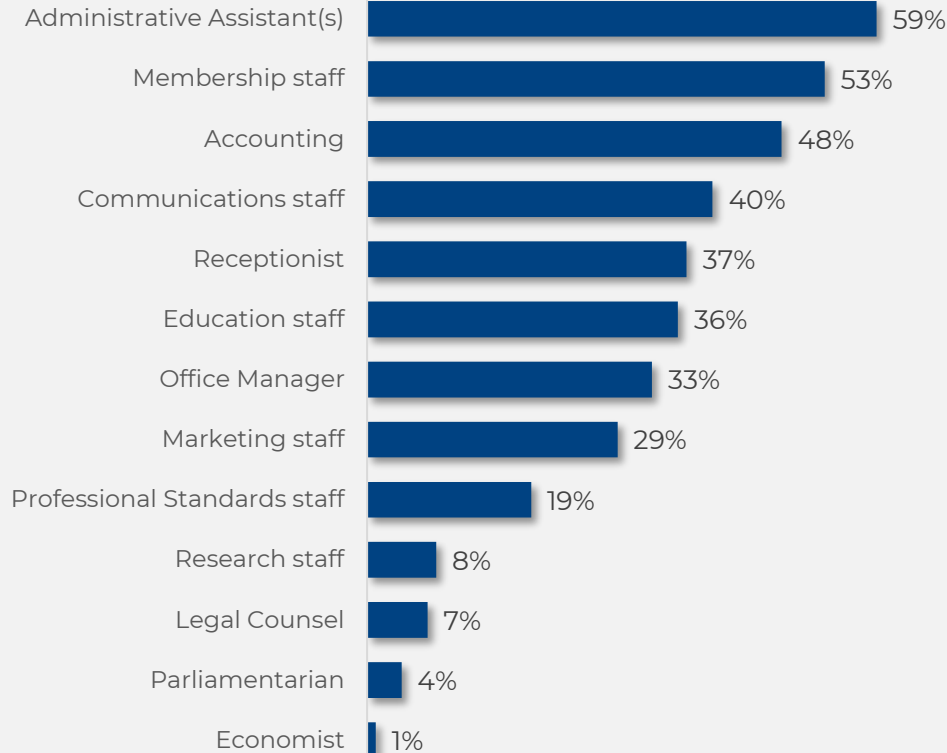
Associations are most likely to at least employ an Association Executive/CEO (94 percent).

Many REALTOR® associations also employ a Membership Director, Government Affairs Director, Education Director, and Communications Director.

Executive/Director Level Roles at Association, by Size

	Mega	Large	Medium	Small
Association Executive/CEO	92%	93%	93%	96%
Membership Director	50%	57%	43%	7%
Government Affairs Director	77%	61%	21%	4%
Education Director	69%	61%	23%	3%
Communications Director	69%	61%	21%	1%
C-Level Staff (other than AE)	65%	28%	12%	6%
Marketing Director	38%	13%	9%	1%
Professional Standards Director	38%	17%	4%	2%
IT Director	27%	13%	3%	1%
RPAC Director	15%	7%	5%	1%
Engagement Director	19%	9%	3%	1%
Public Policy Director	8%	9%	3%	2%
Database Director	19%	4%	4%	1%
Research Director	8%	0%	0%	0%

Other Roles at Association

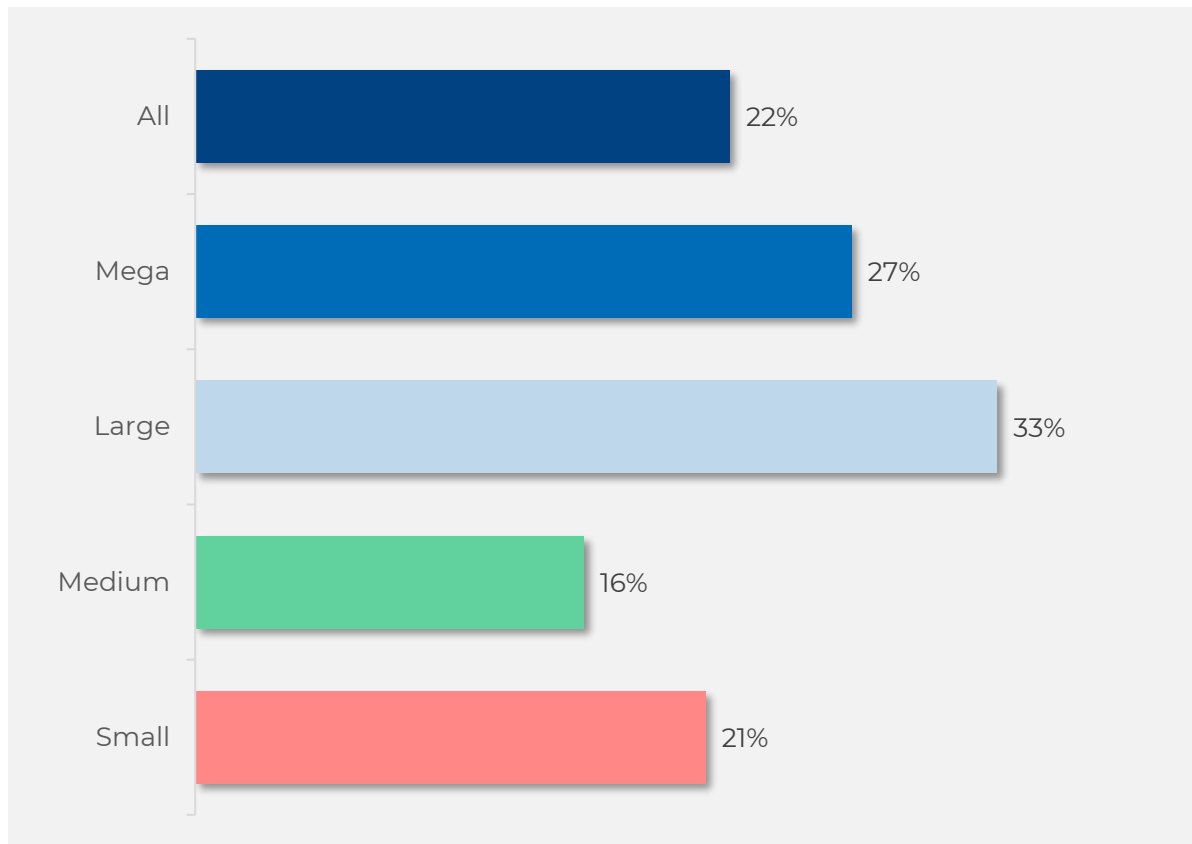


Apart from executive-level roles, many REALTOR® associations employ Administrative Assistants (59 percent), Membership staff (53 percent), and Accounting staff (48 percent).

Other Roles at Association, by Size

	Mega	Large	Medium	Small
Administrative Assistant(s)	81%	68%	56%	51%
Membership staff	77%	72%	56%	33%
Accounting	85%	62%	46%	33%
Communications staff	77%	57%	34%	27%
Receptionist	58%	45%	36%	29%
Education staff	65%	49%	34%	24%
Office Manager	54%	26%	34%	30%
Marketing staff	54%	36%	28%	18%
Professional Standards staff	46%	36%	12%	10%
Research staff	15%	0%	5%	14%
Legal Counsel	38%	6%	2%	3%
Parliamentarian	0%	0%	7%	4%
Economist	4%	0%	0%	2%

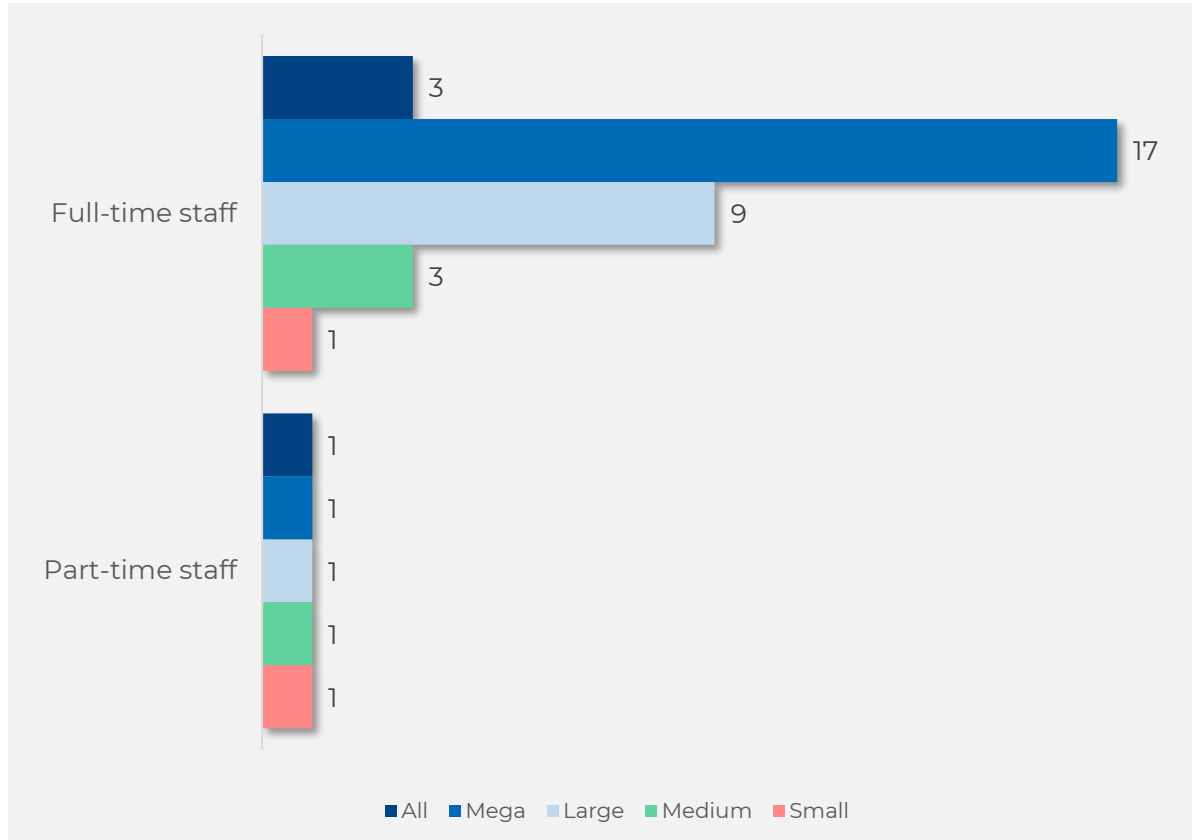
Shares Staff/Services with Other Associations



Some associations share staff and services with other REALTOR® associations to conserve and optimize resources.

Twenty-two percent of all associations share staff and services with other associations. This is most common among Large associations (33 percent) and least common among Medium associations (16 percent).

Median Number of Association Staff Members



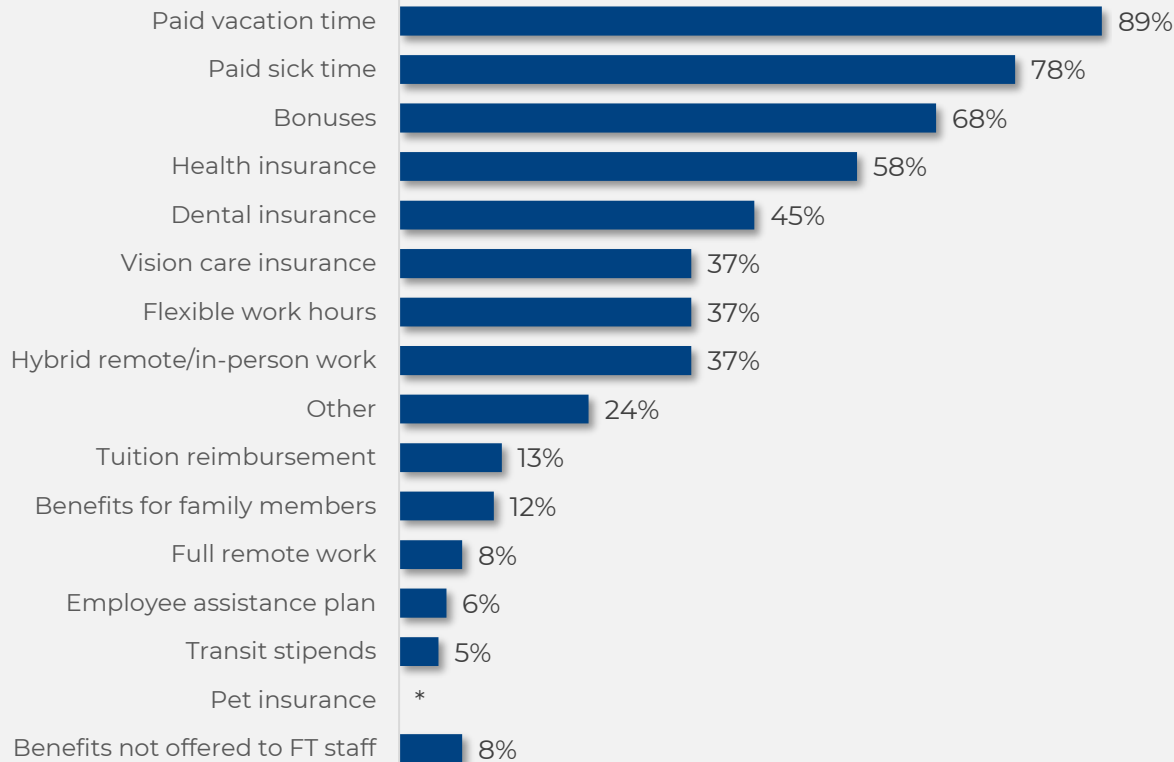
The typical REALTOR® association employs three full-time staff members and one part-time staff member.

Mega associations typically have the largest staff with 17 full-time staff, compared to Small associations, which typically have just one full-time staff member.



Benefits

Benefits Offered to Full-time Staff



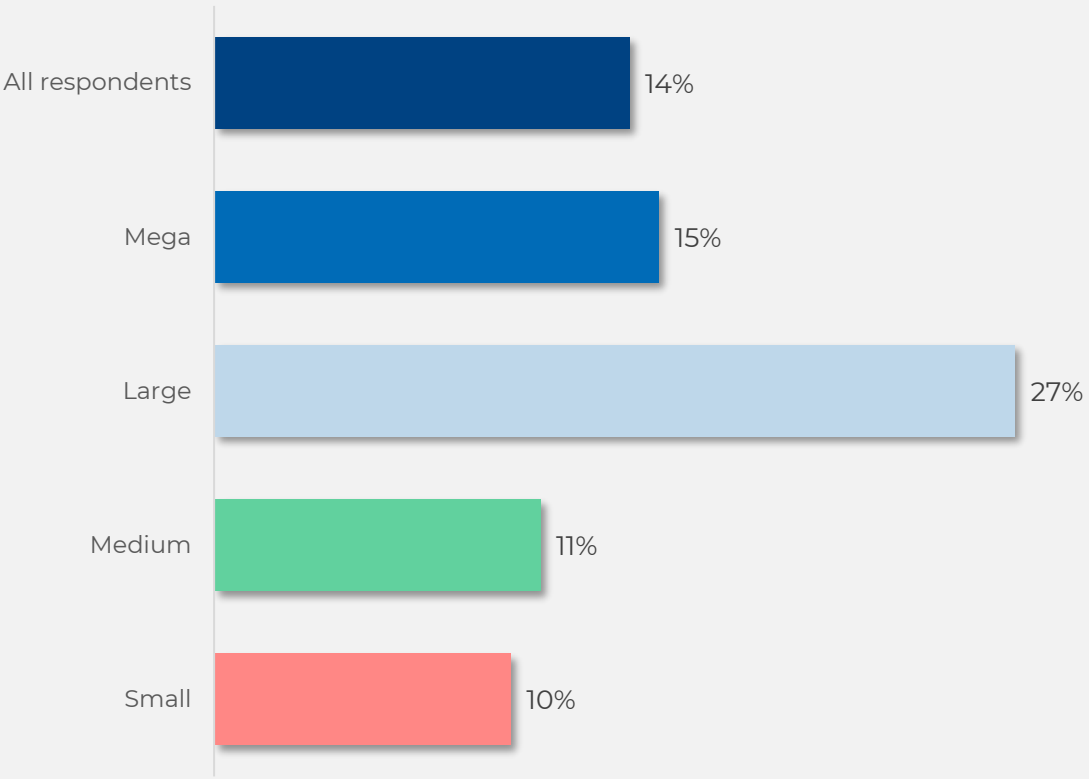
While this varies by association size, the most common benefit offered to full-time staff is paid vacation time off (89 percent), followed by paid sick time (78 percent), bonuses (68 percent), and health insurance (58 percent).

*Less than one percent

Benefits Offered to Full-time Staff, by Association Size

	Mega	Large	Medium	Small
Health insurance	96%	93%	63%	21%
Paid vacation time	96%	98%	95%	73%
Dental insurance	92%	89%	45%	7%
Bonuses	92%	80%	70%	52%
Paid sick time	85%	91%	83%	63%
Vision care insurance	73%	80%	37%	2%
Hybrid remote/in-person work	73%	72%	28%	19%
Flexible work hours	54%	46%	34%	30%
Tuition reimbursement	42%	30%	4%	5%
Benefits for family members	42%	24%	7%	1%
Employee assistance plan	31%	9%	3%	0%
Full remote work	27%	13%	3%	6%
Transit stipends	12%	11%	2%	3%
Pet insurance	0%	0%	1%	0%
Other	27%	28%	26%	19%
Benefits not offered to FT staff	4%	0%	3%	20%

Offers Association Health Plans to Members



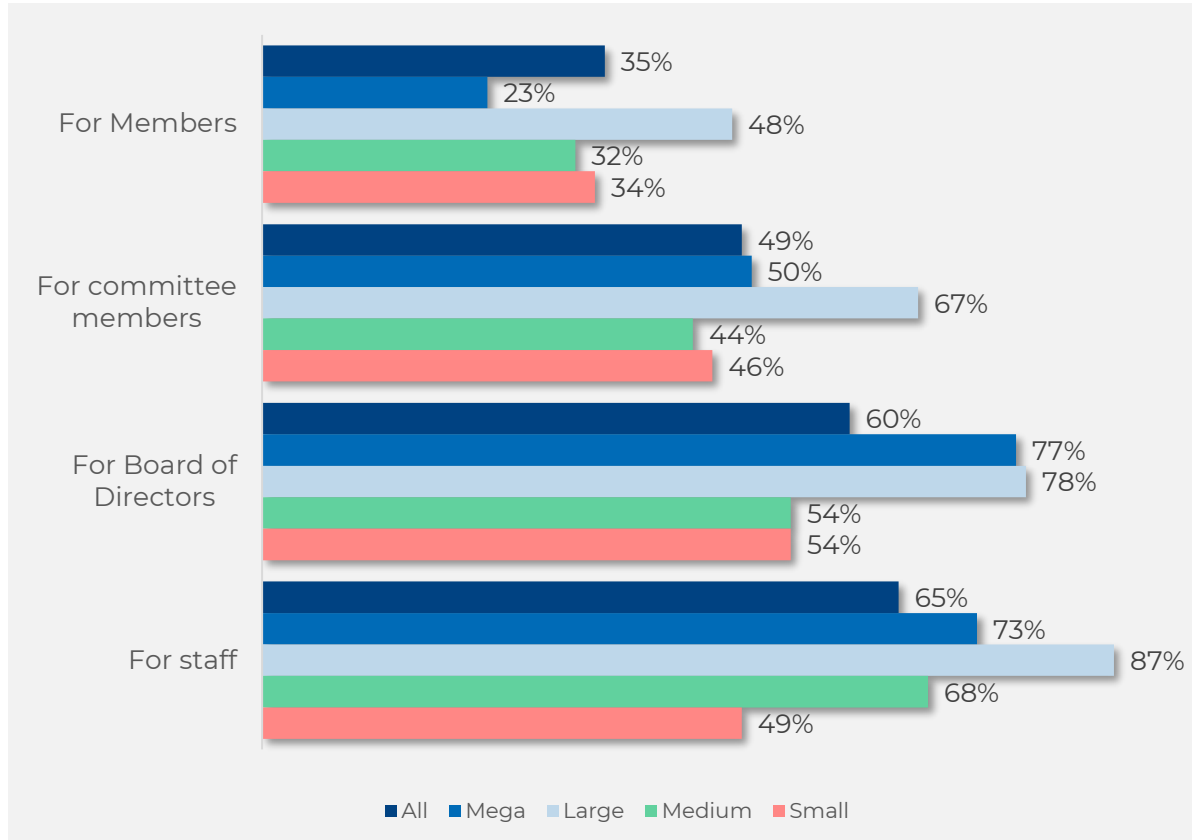
Fourteen percent of associations offer health plans to their REALTOR® members.

This is most common among Large associations (27 percent).

Rules & Guidelines



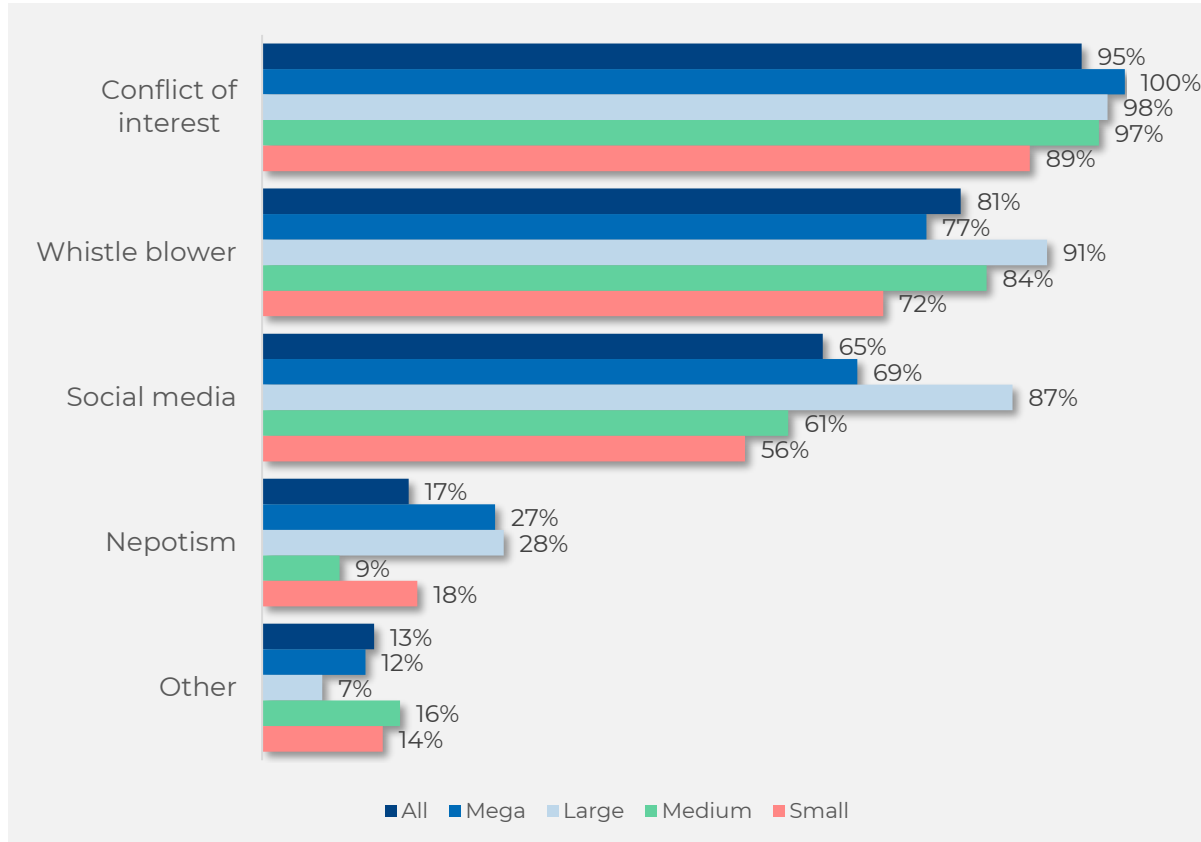
Association has Social Media Policy or Guidelines



Associations are most likely to have a social media policy or guidelines for staff (87 percent) and least likely to have these for members (35 percent).

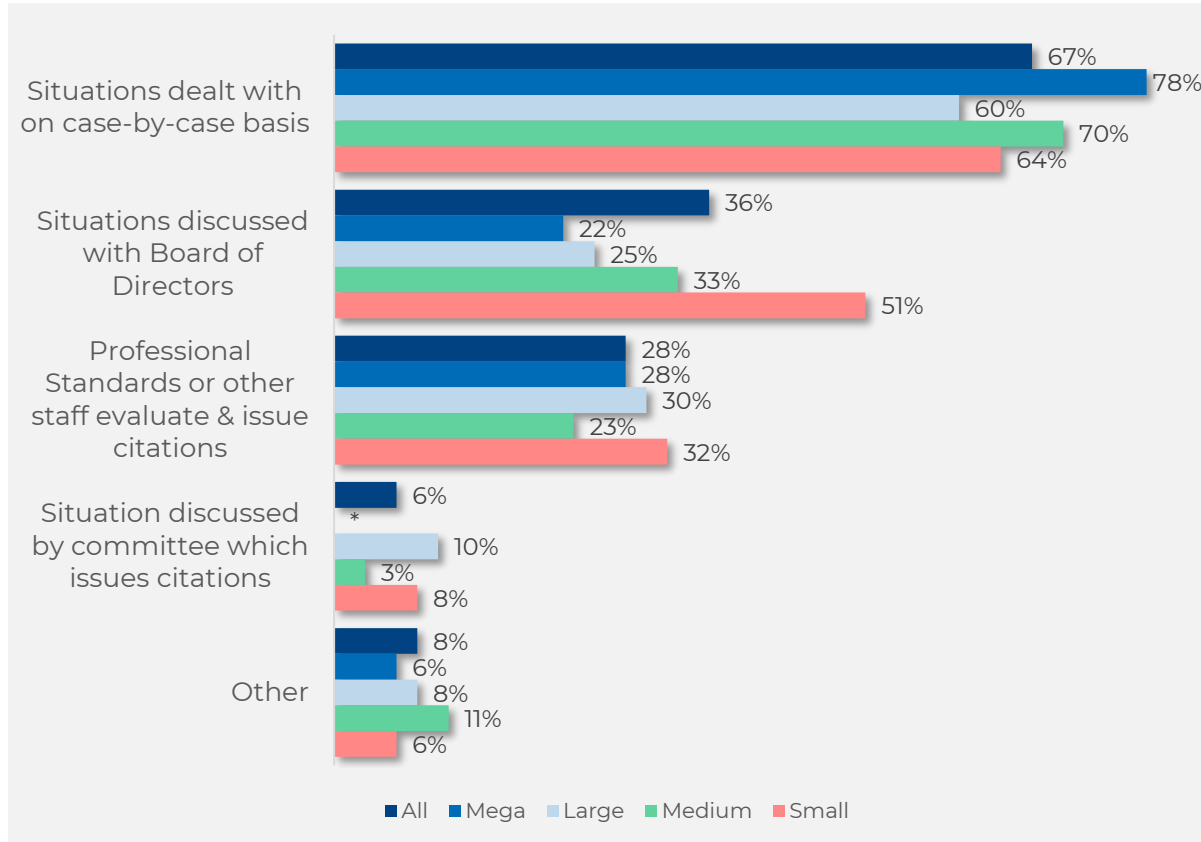
Generally, Large REALTOR® associations are most likely to have a social media policy or guidelines.

Association has Policy for...



REALTOR® associations are most likely to have a conflict-of-interest policy (95 percent), followed by a whistle-blower policy (81 percent), and a social media policy (65 percent).

Response to Violations of Social Media Policies



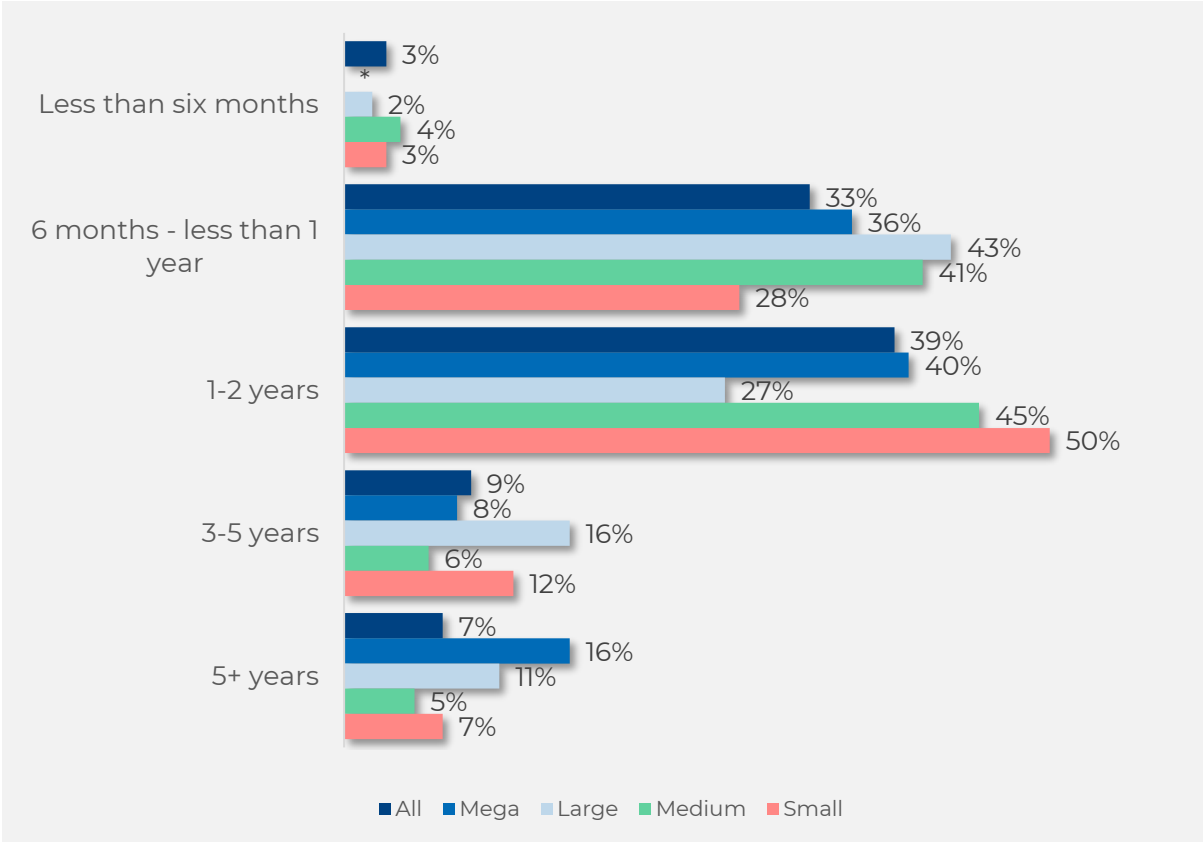
Among associations with a social media policy, violations are most likely dealt with on a case-by-case basis.

*Less than one percent

Financial & Operations



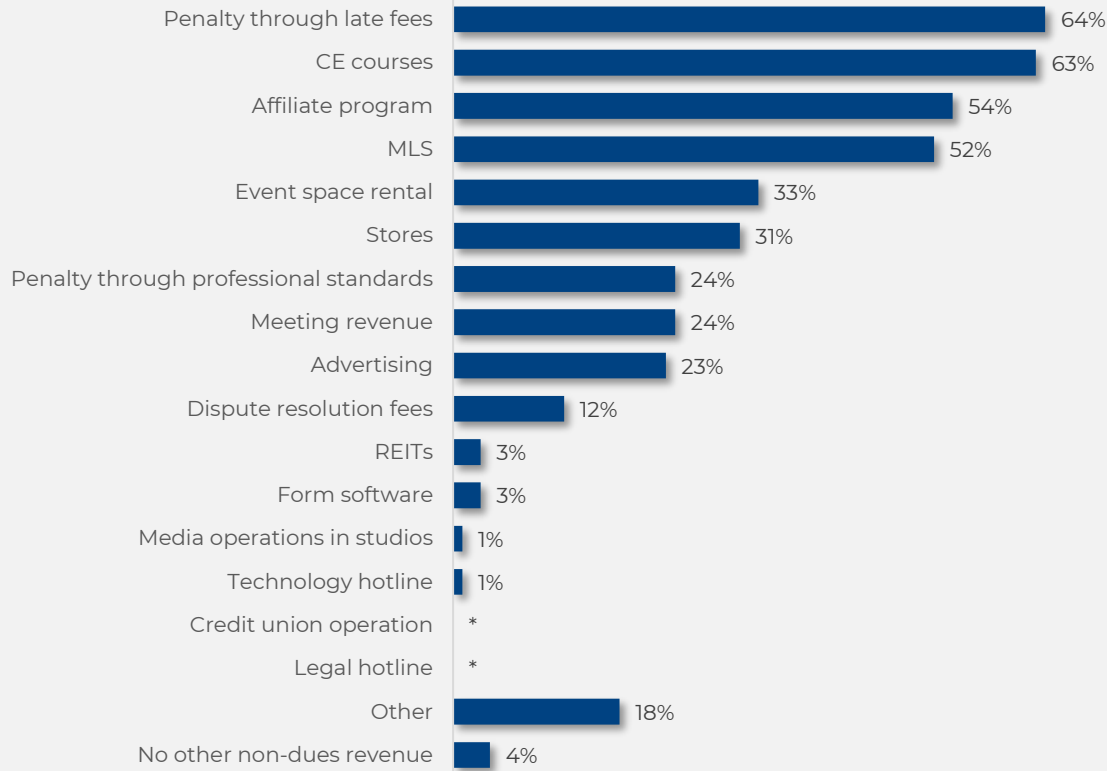
Operating Timeline for Financial Reserves



REALTOR® associations most often maintain financial reserves for a 1–2-year timeline (39 percent), followed by a 6-month – less than 1-year timeline (33 percent).

*Less than one percent

Non-dues Revenue Sources



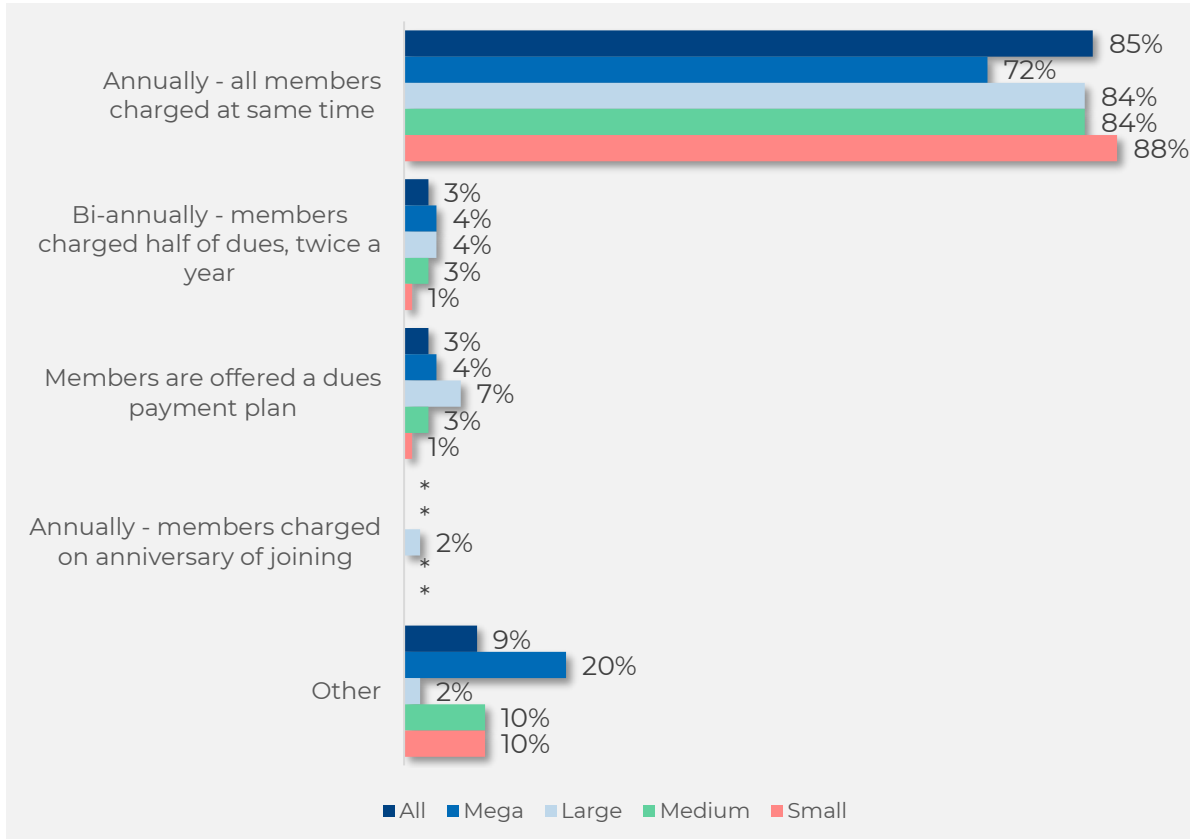
The most common non-dues revenue sources of REALTOR® associations are penalties through late fees (64 percent) and CE courses (63 percent), followed by affiliate programs and the local MLS.

*Less than one percent

Non-dues Revenue Sources, by Size

	Mega	Large	Medium	Small
Penalty through late fees	48%	67%	72%	58%
CE courses	68%	74%	69%	48%
Affiliate program	40%	59%	58%	52%
MLS	32%	48%	49%	63%
Event space rental	36%	54%	36%	19%
Stores	32%	48%	43%	8%
Penalty through professional standards	32%	41%	25%	12%
Meeting revenue	52%	28%	30%	7%
Advertising	48%	41%	23%	8%
Dispute resolution fees	24%	28%	10%	4%
REITs	4%	7%	3%	2%
Form software	16%	7%	1%	0%
Media operations in studios	4%	4%	0%	0%
Technology hotline	0%	0%	2%	0%
Credit union operation	0%	0%	0%	0%
Legal hotline	0%	0%	0%	0%
Other	32%	26%	19%	10%
No other non-dues revenue	0%	2%	1%	9%

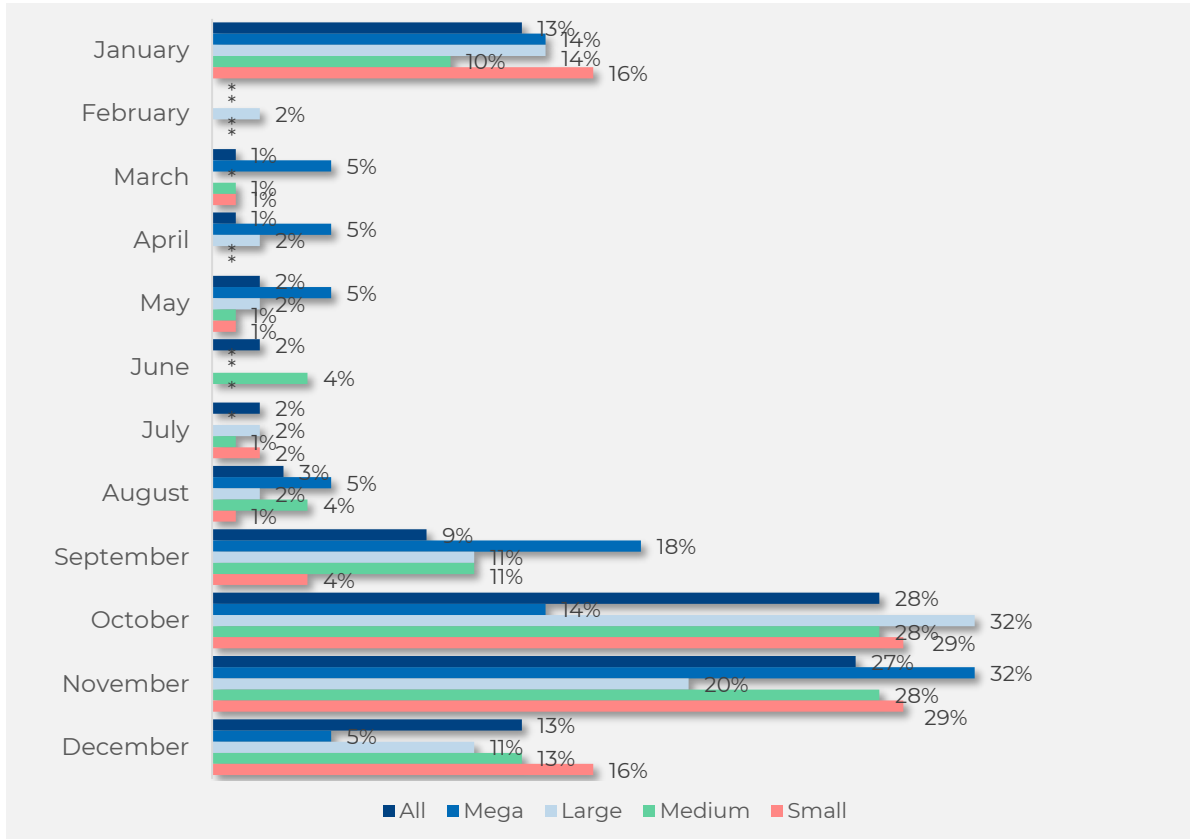
Timing of Dues Payment Billing



Associations primarily (85 percent) conduct dues billing on an annual basis, where all members are charged at the same time.

*Less than one percent

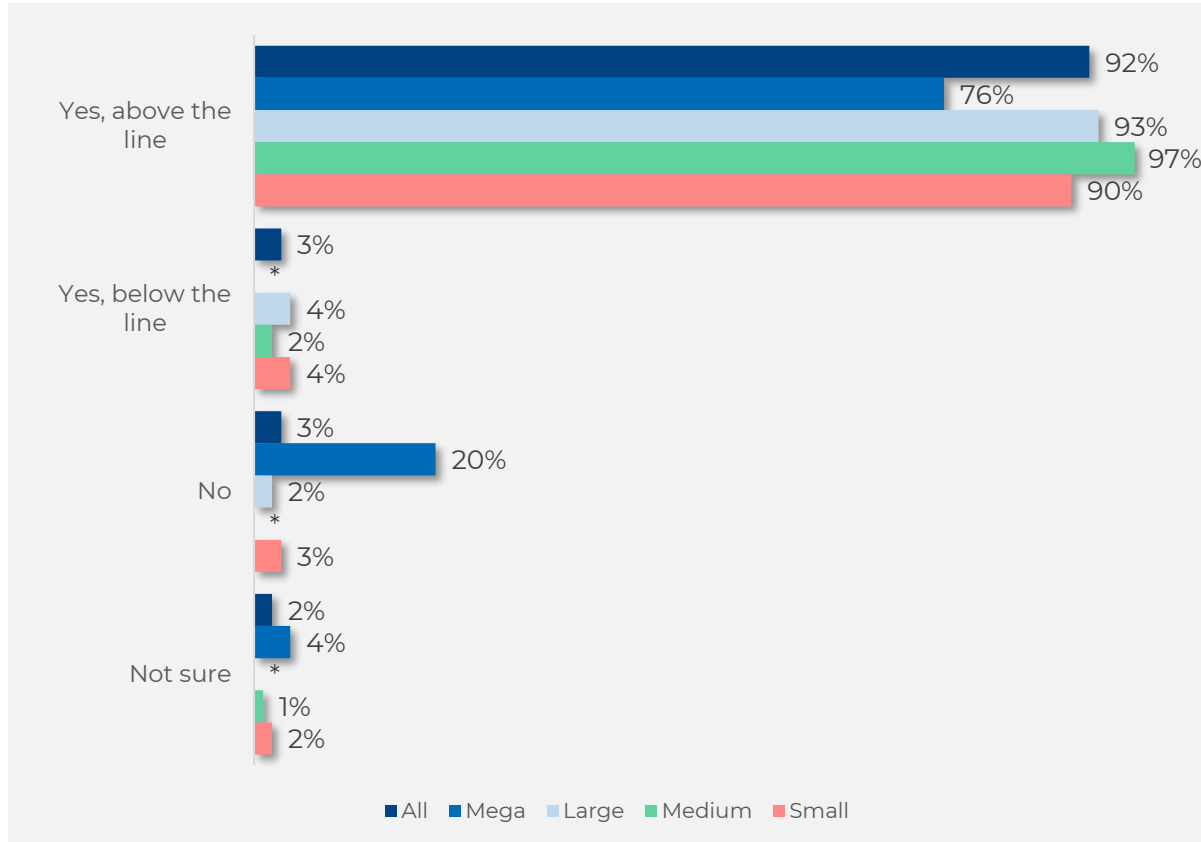
Month Association Begins Collecting Dues



Associations most often begin collecting dues payments in October (28 percent) or November (27 percent).

*Less than one percent

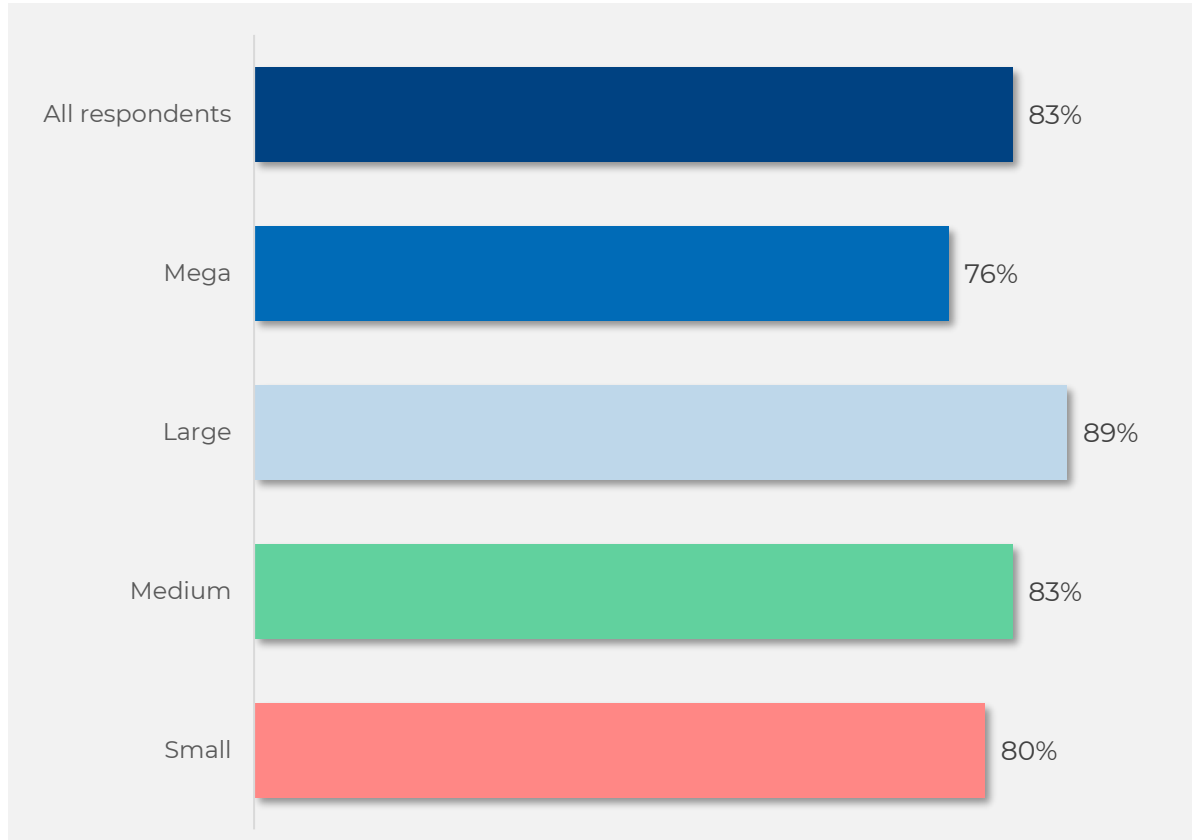
Solicits RPAC Contributions at Same Time as Dues



The far majority (92 percent) of associations solicit RPAC contributions at the same time as dues, above the line.

*Less than one percent

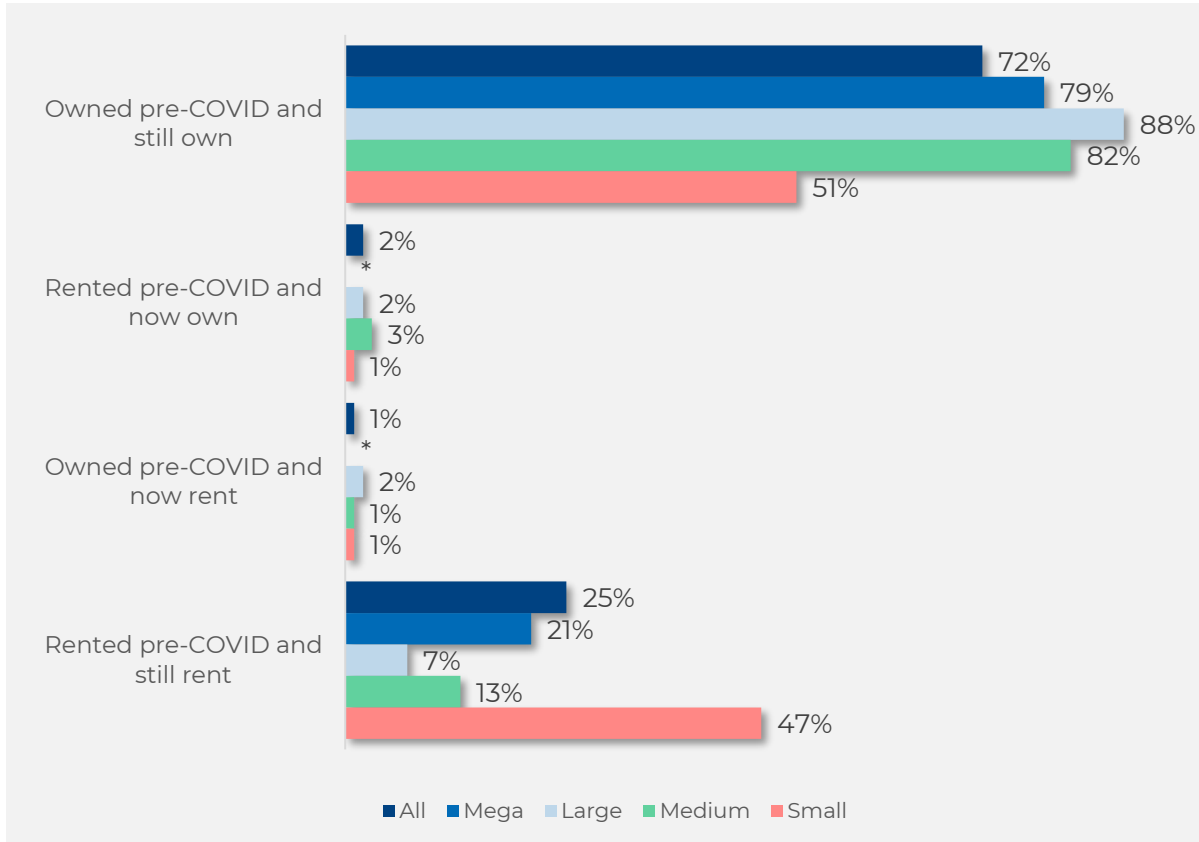
Holds or Hosts RPAC Fundraising Events



Eighty-three percent of associations hold or host RPAC fundraising events.

This is most common among Large associations and least common among Mega associations.

Association Building Ownership



Nearly three-fourths of REALTOR® associations (72 percent) owned their buildings pre-COVID and still own them.

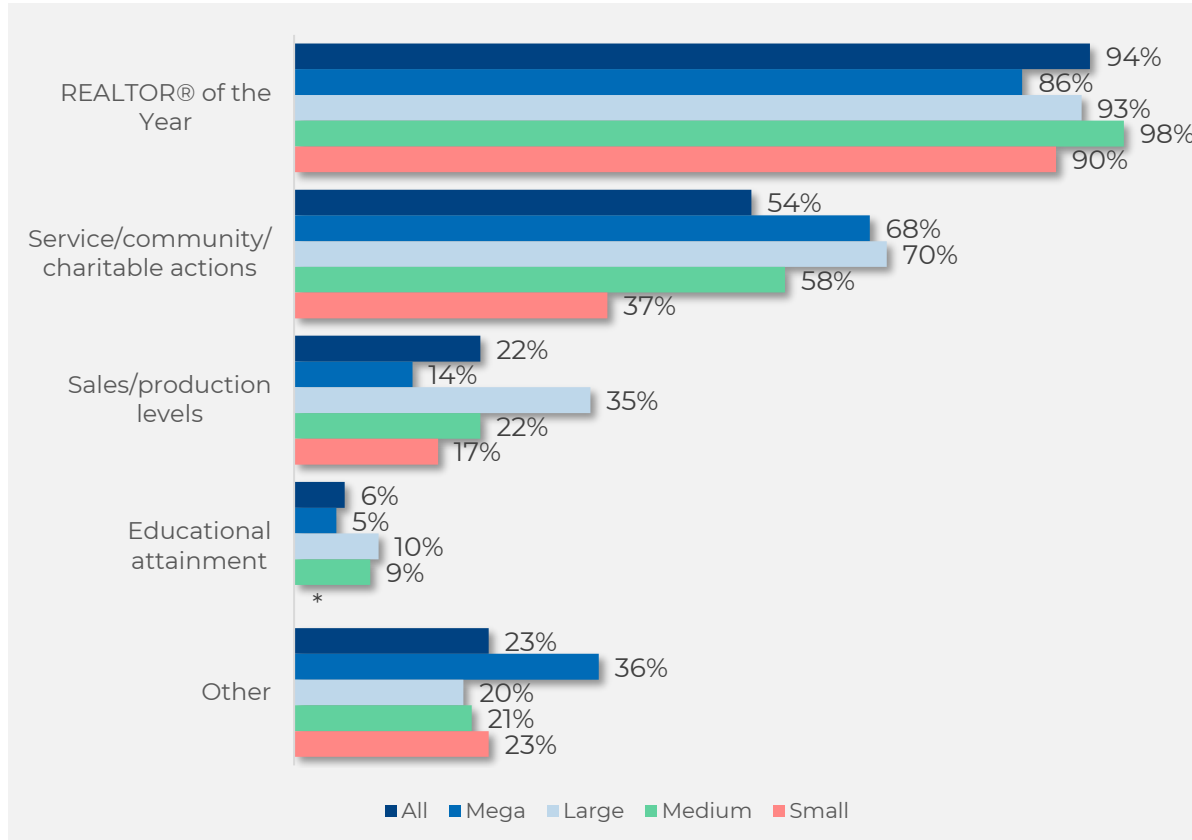
Small associations are more likely to have rented pre-COVID and still rent their buildings at 47 percent.

*Less than one percent

Offerings & Courses



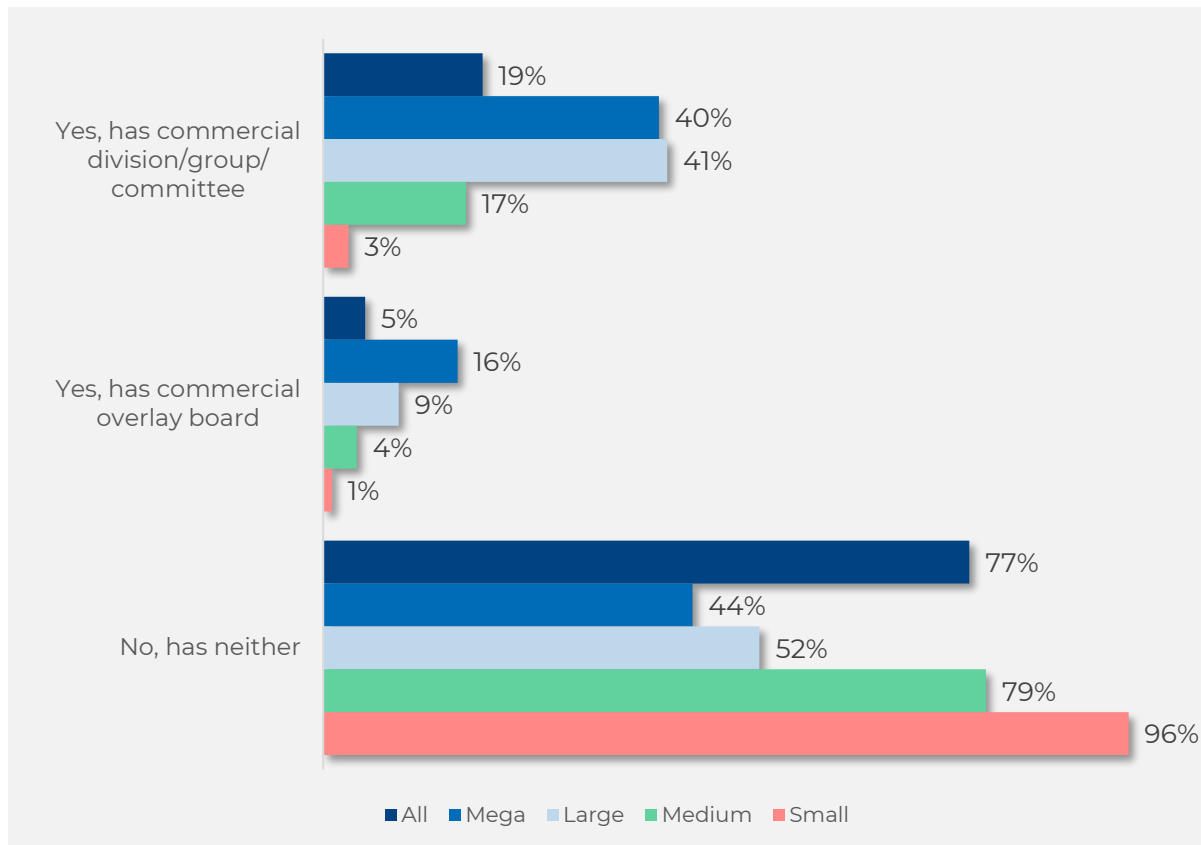
Has Awards Program for...



Nearly all (94 percent) associations have an award program for REALTOR® of the Year, while more than half (54 percent) have an awards program for service/community/charitable actions.

*Less than one percent

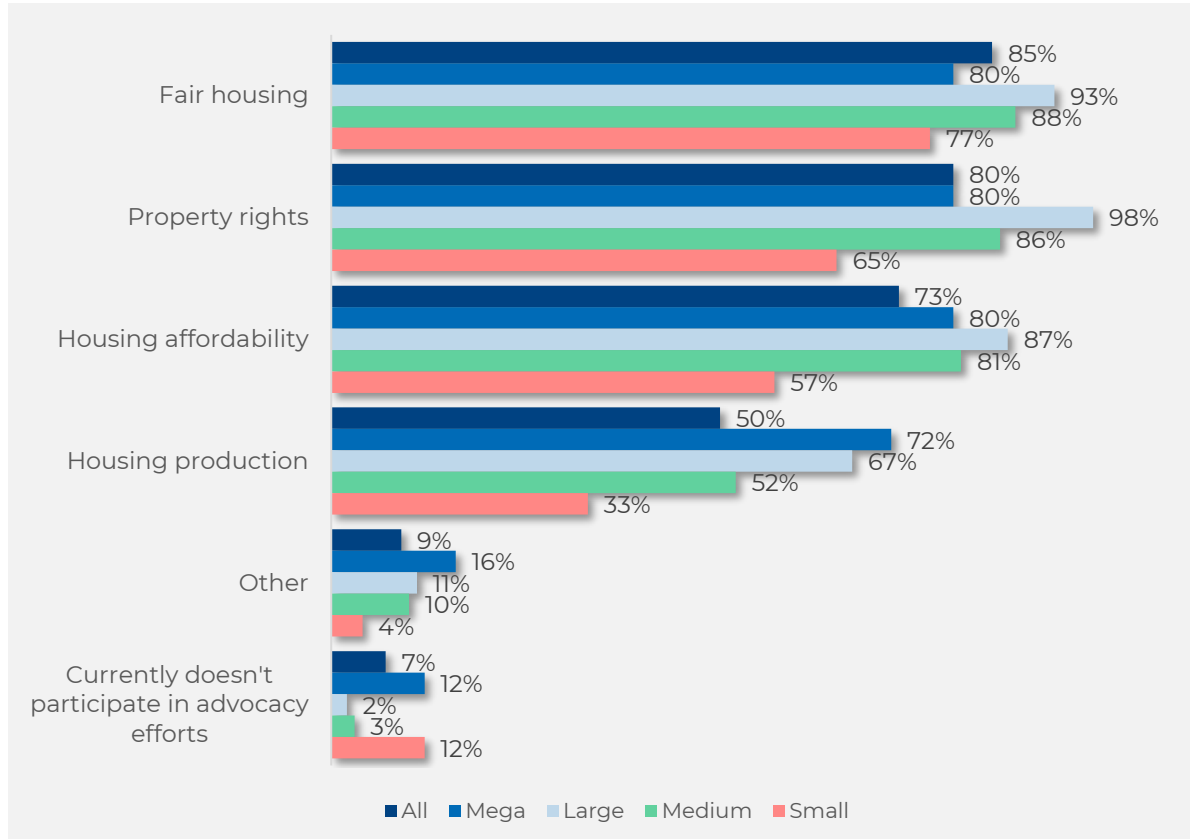
Has Commercial Division or Overlay Board



Nearly one-fifth (19 percent) of REALTOR® associations have a commercial division, group, or committee.

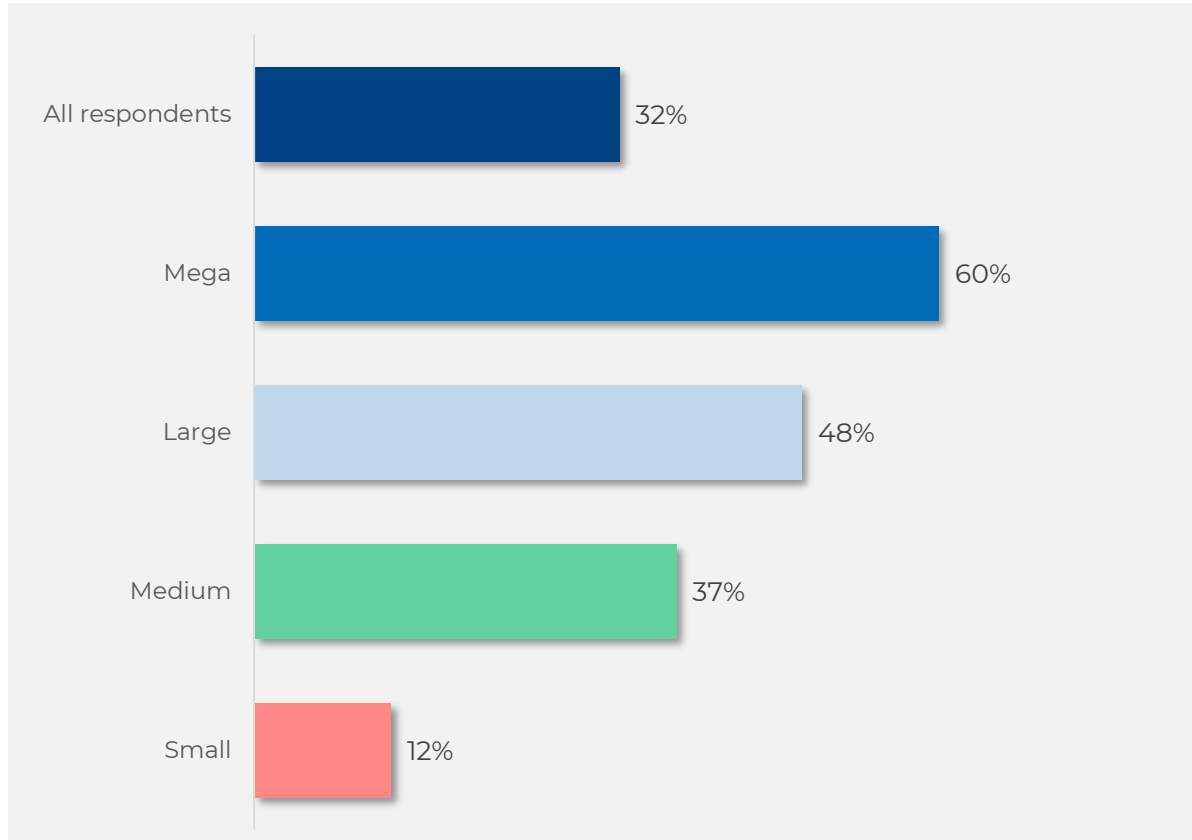
Only five percent have a commercial overlay board, while 77 percent have neither.

Participates in Advocacy Efforts for...



REALTOR® associations most often participate in advocacy efforts for fair housing (85 percent), property rights (80 percent), and housing affordability (73 percent).

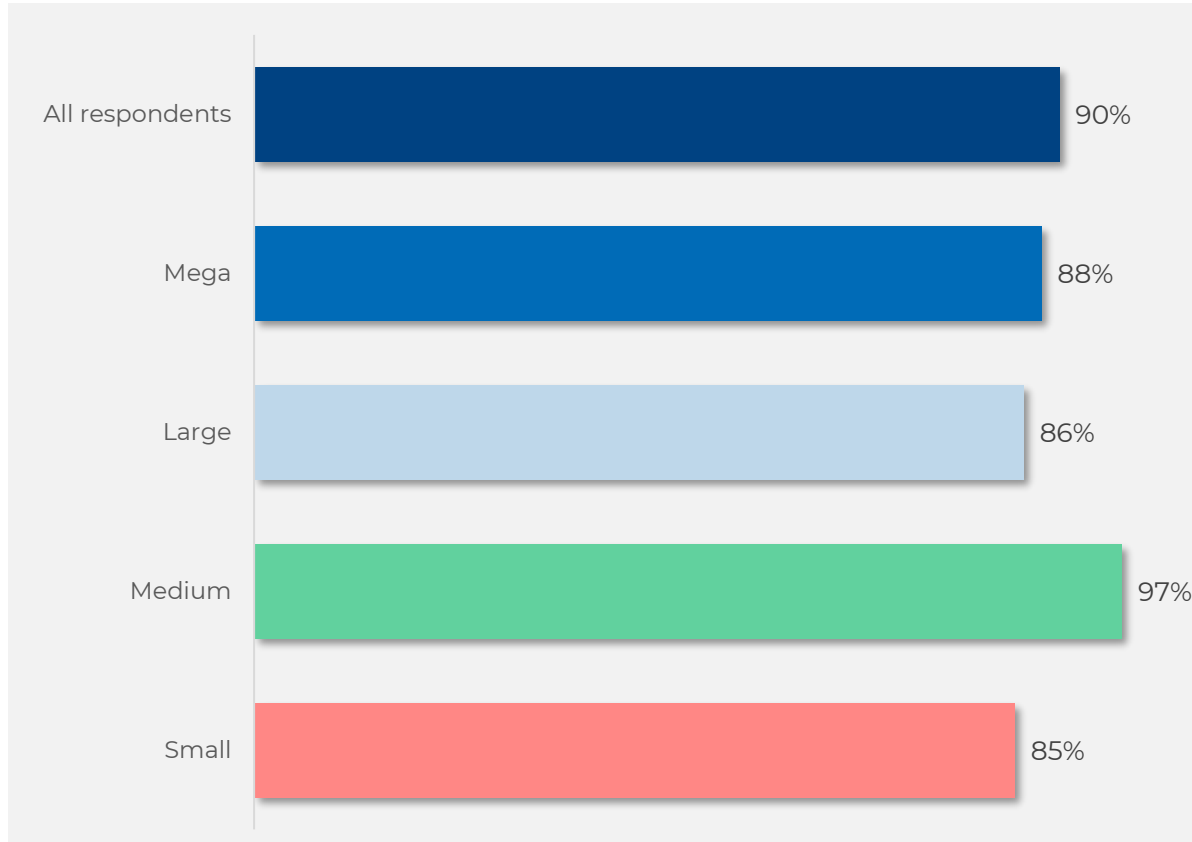
Has Own Real Estate School



Nearly one-third of REALTOR® associations have their own real estate school.

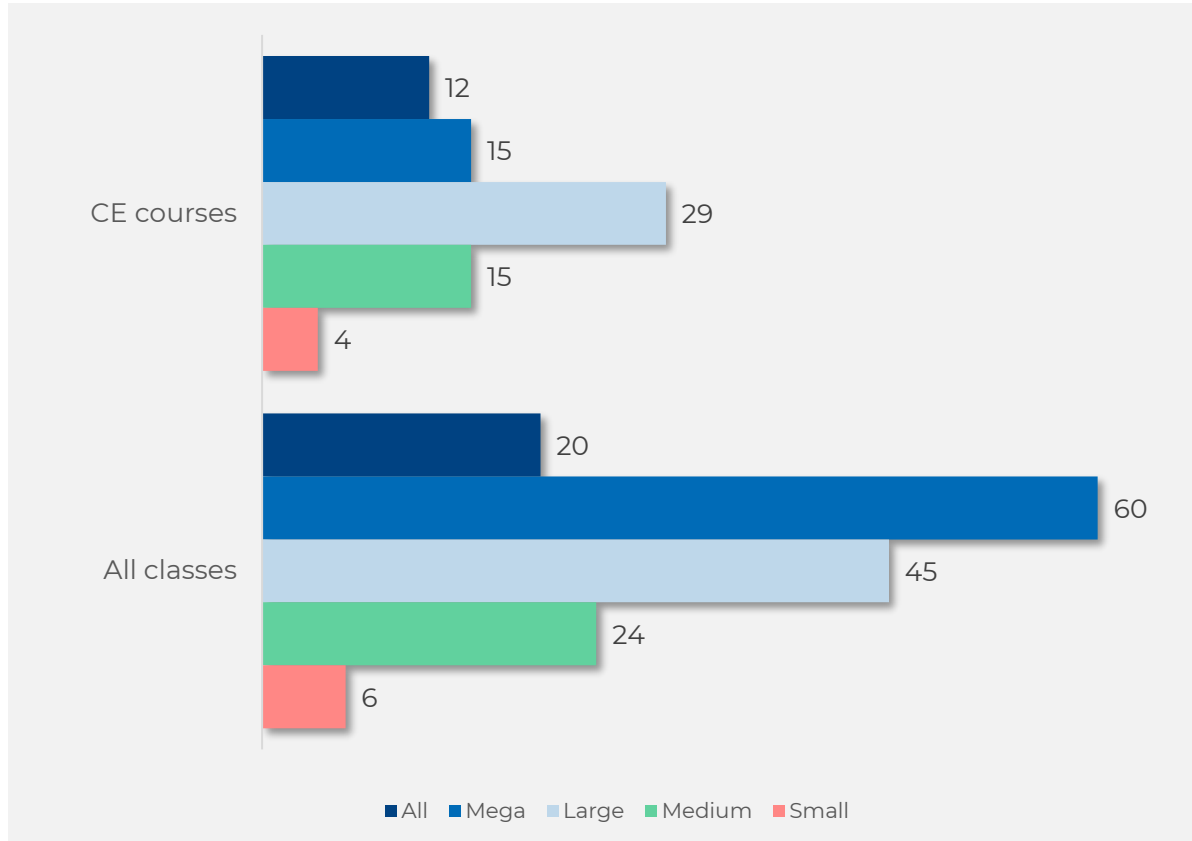
This varies widely by association size – 60 percent of Mega associations have their own real estate school compared to 12 percent of Small associations.

Offers CE Courses



The far majority of REALTOR® associations offer continuing education courses at 90 percent.

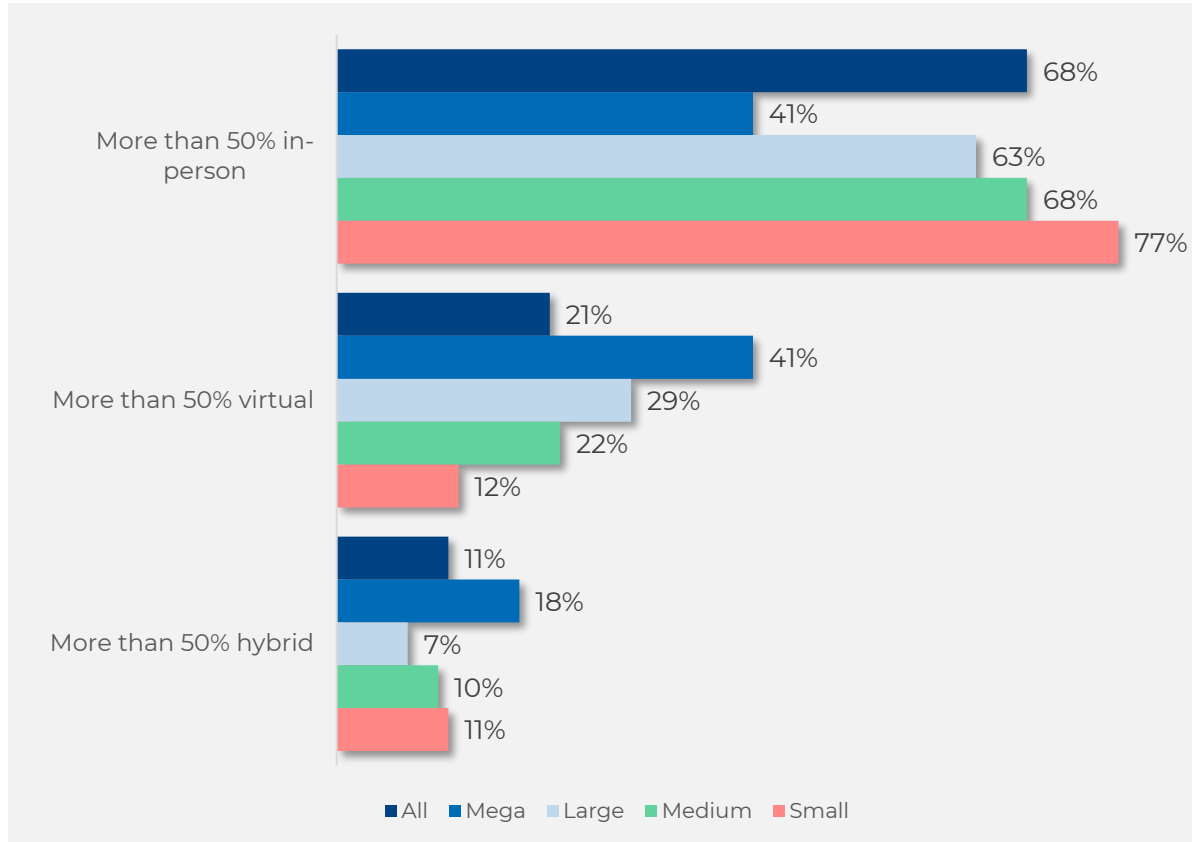
Median Number of Educational Courses Offered



The typical REALTOR® association offers 12 continuing education courses and 20 total classes.

This varies by association size – the typical Mega association offers 60 total classes, while the typical Small association offers six total classes.

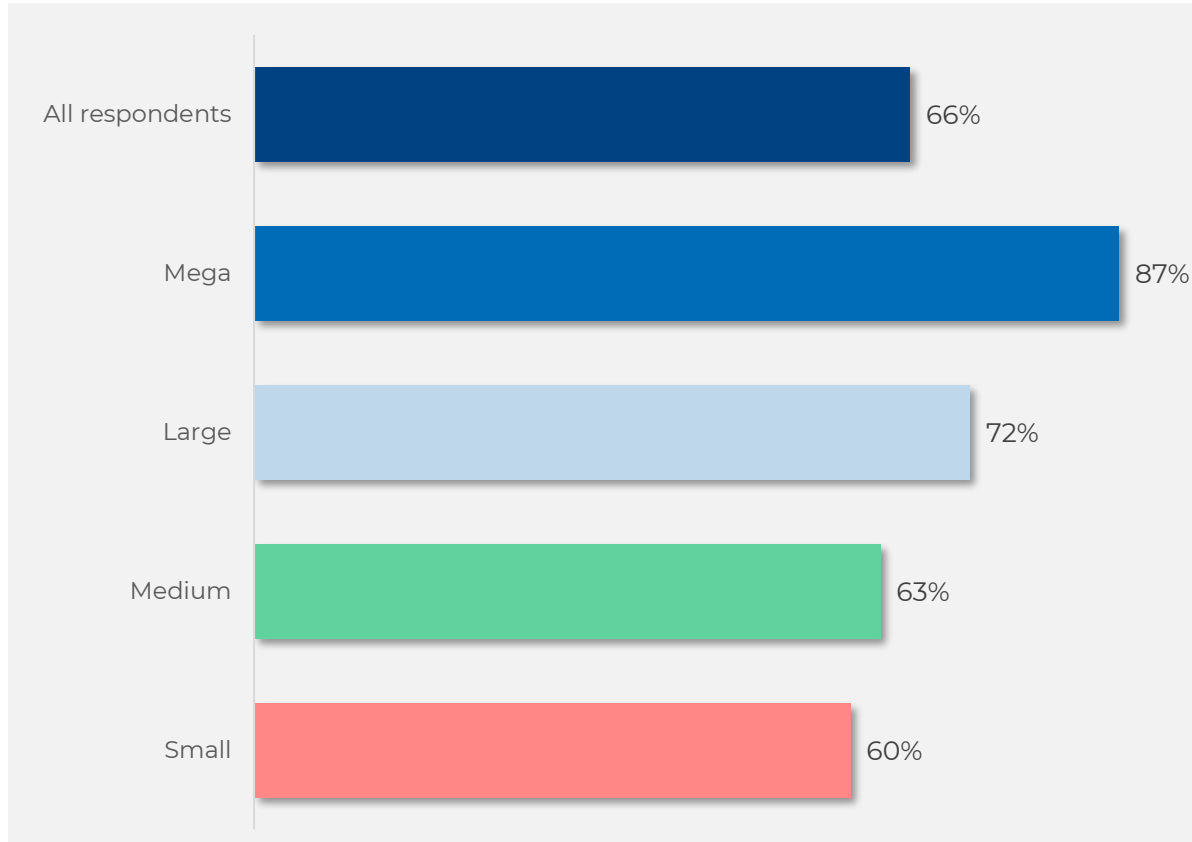
Typical Audience for Educational Events



Two-thirds of REALTOR® associations have more than 50 percent in-person attendance for their educational events.

The smaller the association, the more likely their educational event audiences are majority in-person.

Has or Participates in Leadership Program



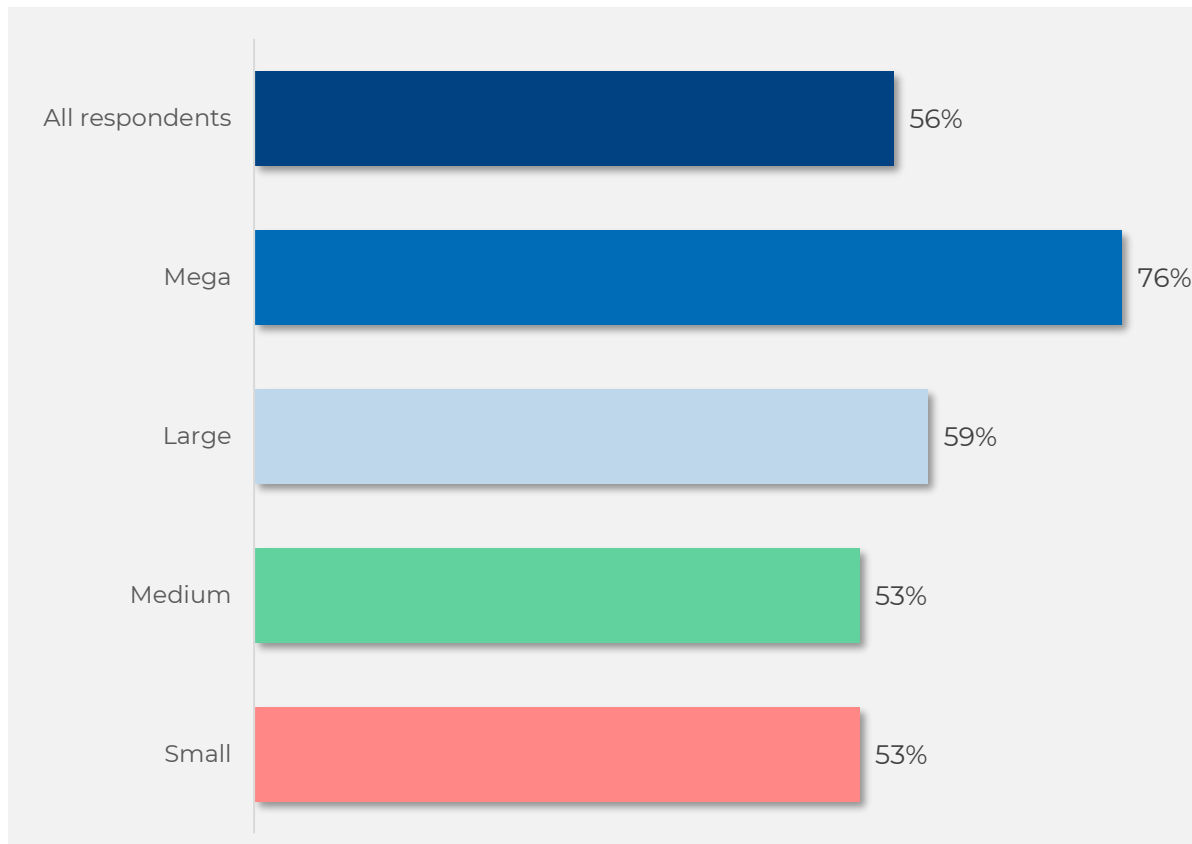
Nearly two-thirds of associations have or participate in a leadership program.

Eighty-seven percent of Mega associations have or participate in a leadership program, compared to 60 percent of Small REALTOR® associations.

Governance/Board of Directors



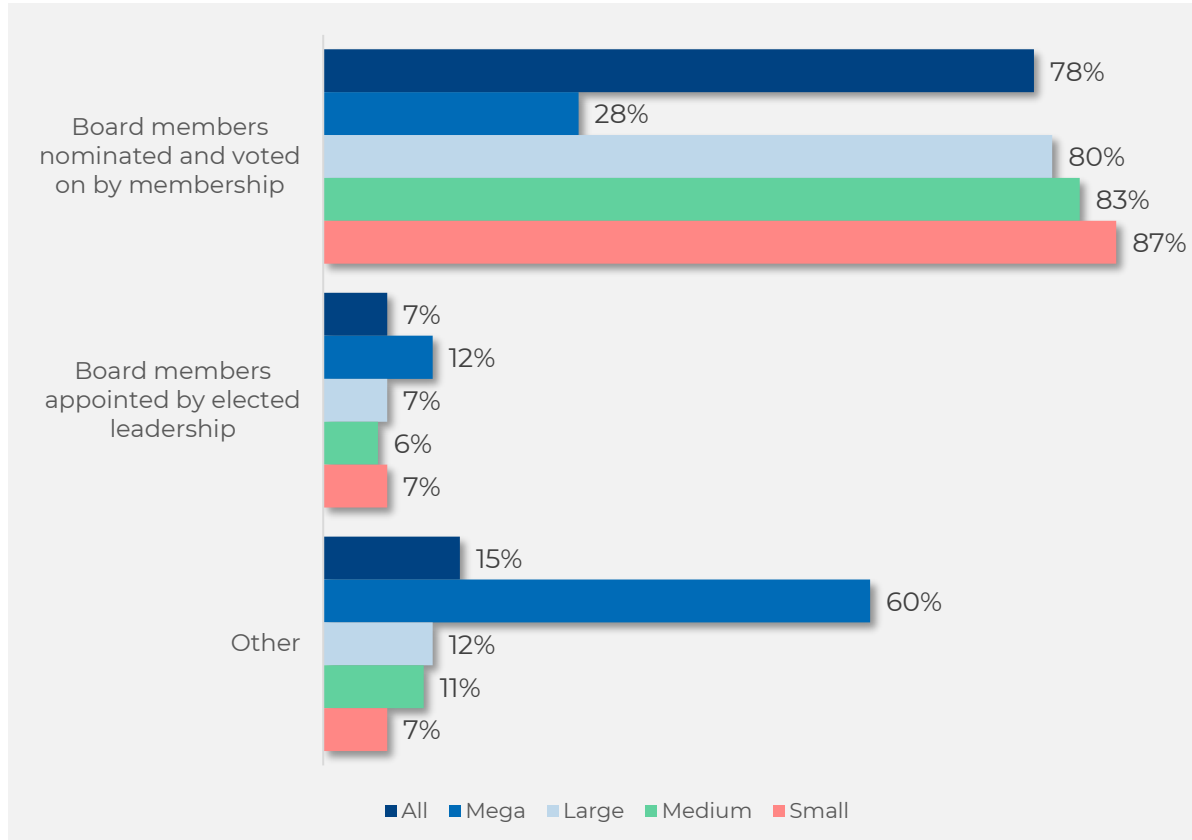
Has Virtual Voting for Governance Meetings



More than half (56 percent) of REALTOR® associations use virtual voting for governance meetings.

This is most common among Mega (76 percent) and Large (59 percent) associations.

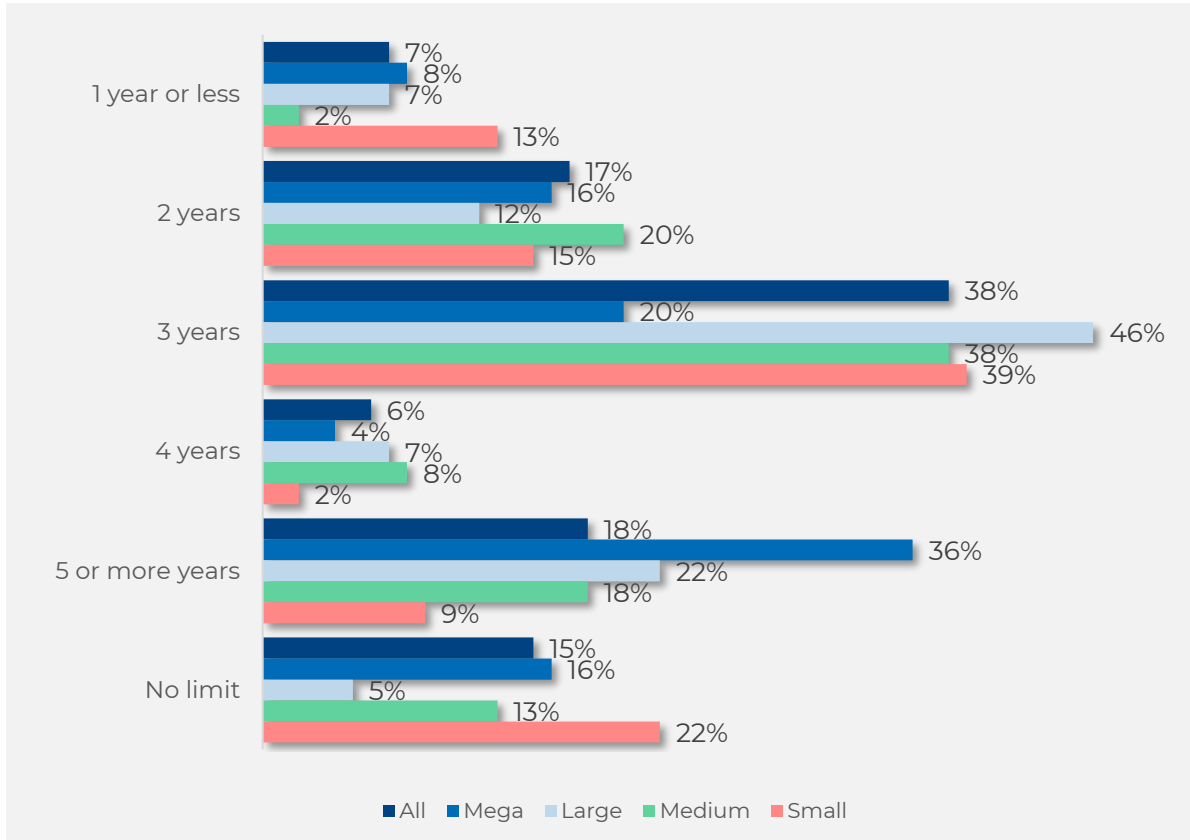
How Association Board is Selected



Seventy-eight of REALTOR® associations' board members are nominated and voted on by their members.

Mega associations are likely (60 percent) to use some other board selection process.

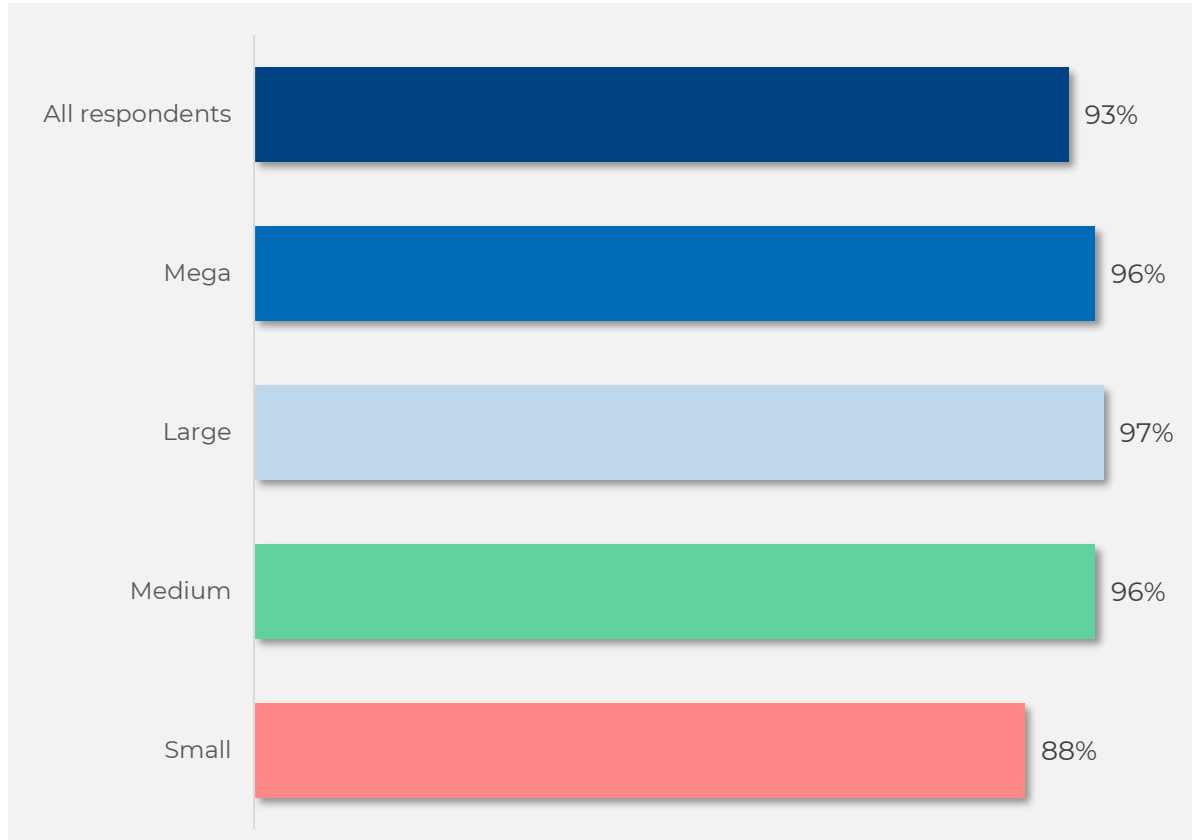
Board Member Term Limit



REALTOR® associations are most likely (38 percent) to have a three-year term limit for their board members.

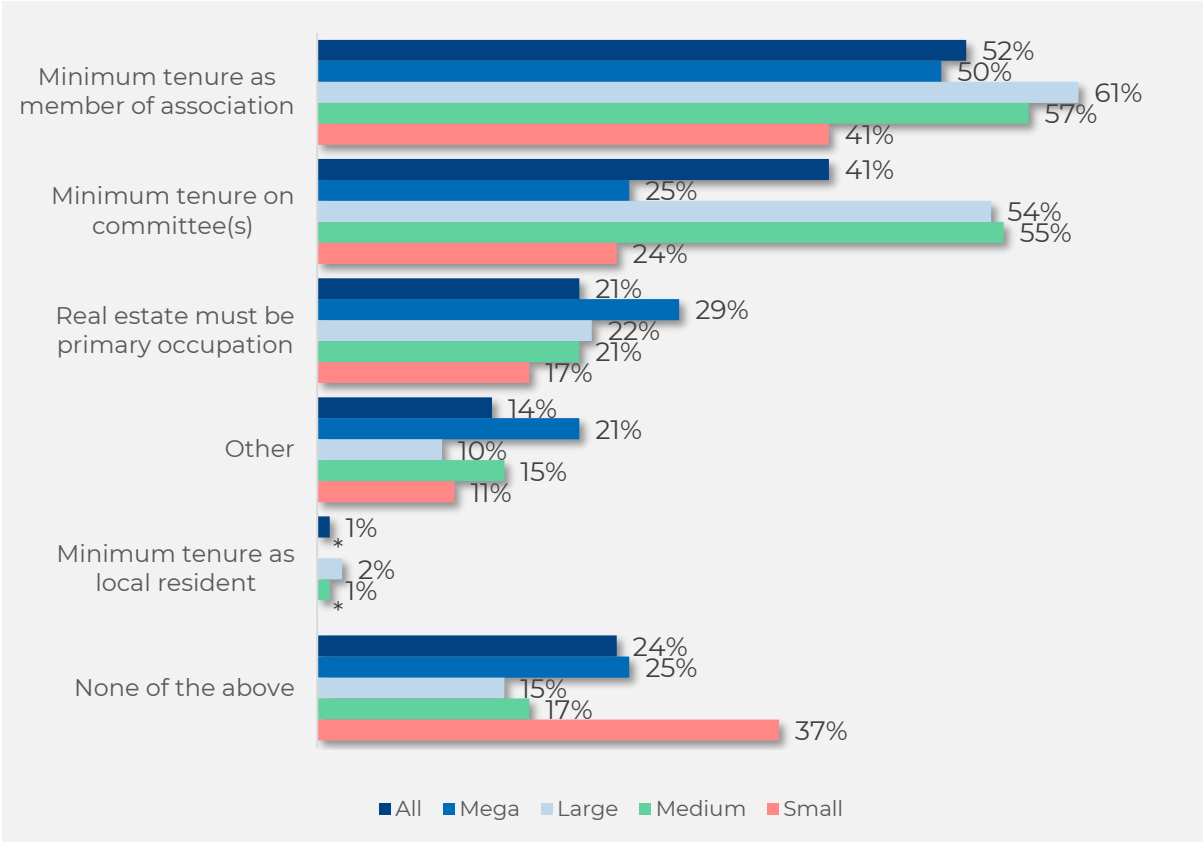
This varies, however, by association size – Mega associations are most likely to have a 5+ year term limit, compared to a three-year limit among Large, Medium, and Small associations.

Has Vacancy Policy to Replace Directors/Officers Mid-term



Nearly all (93 percent) REALTOR® associations have a vacancy policy for replacing directors or officers leaving mid-term.

Board Criteria for Participation

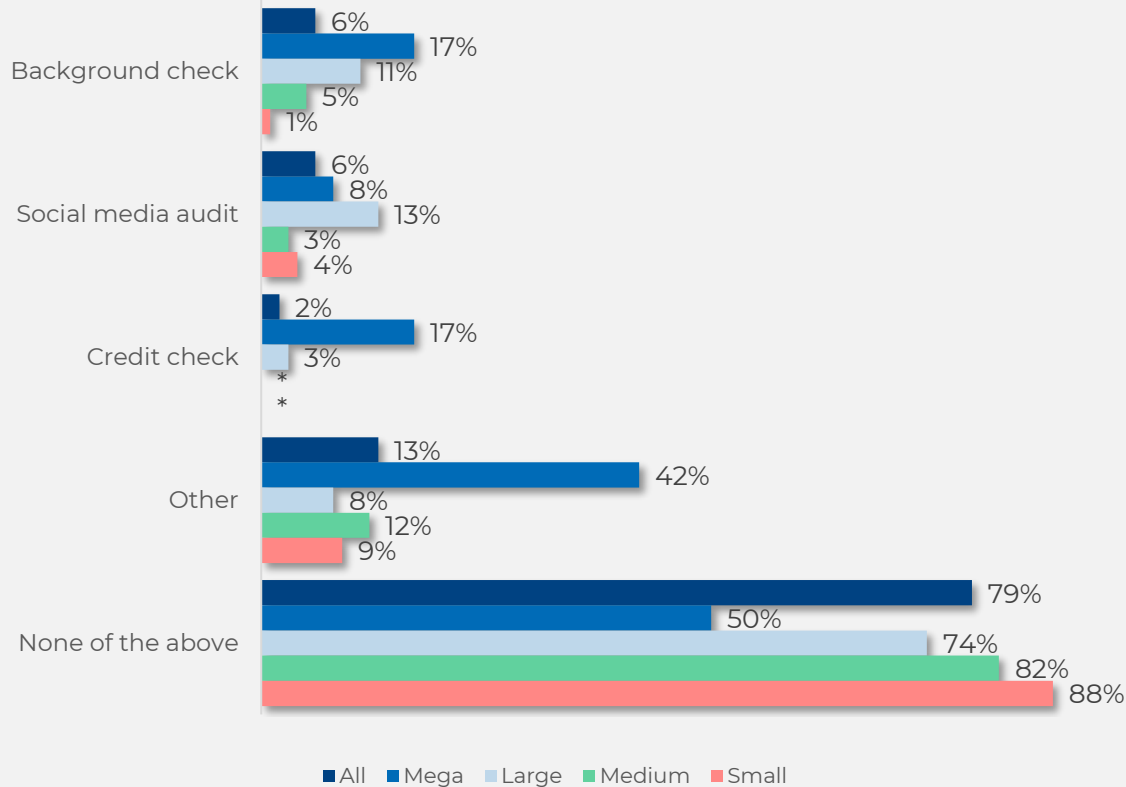


The most common criterion for Board of Directors participation among REALTOR® associations is a minimum tenure as a member of the association (52 percent), followed by a minimum tenure on a committee(s) (41 percent).

Small associations are most likely not to have any of the listed criteria for Board participation.

*Less than one percent

Additional Criteria for Leadership Positions



Most REALTOR® associations (79 percent) do not have additional criteria for leadership position participation.

Less than ten percent require a background check or social media audit for leadership position participation.

*Less than one percent

Methodology

The 2023 Association Profile survey was sent via email in June 2023 to a random sample of 927 Association Executives across the nation. The survey received 292 responses for an overall response rate of 31.5 percent. The confidence interval at a 95 percent level of confidence is +/-4.8 percent.

Where relevant, association data is displayed and segmented based on size as follows:

- Mega – associations with 7,000 or more members
- Large – associations with 2,000 to 6,999 members
- Medium – association with 500 to 1,999 members
- Small – associations with fewer than 500 members





The National Association of REALTORS® is America's largest trade association, representing more than 1.5 million members, including NAR's institutes, societies and councils, involved in all aspects of the real estate industry. NAR membership includes brokers, salespeople, property managers, appraisers, counselors and others engaged in both residential and commercial real estate.

The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the National Association of REALTORS® and subscribes to its strict Code of Ethics.

Working for America's property owners, the National Association provides a facility for professional development, research and exchange of information among its members and to the public and government for the purpose of preserving the free enterprise system and the right to own real property.

NATIONAL ASSOCIATION OF REALTORS® RESEARCH GROUP

The Mission of the NATIONAL ASSOCIATION OF REALTORS® Research Group is to produce timely, data-driven market analysis and authoritative business intelligence to serve members, and inform consumers, policymakers and the media in a professional and accessible manner.

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