



# **ORGANIZATION ASSESSMENT CHECKLIST**

The Organization Assessment Checklist is a resource designed to help an association assess all REALTOR® association management functions and operational practices to ensure that its processes and procedures are in order. This comprehensive checklist aims to cover all areas of REALTOR® association management and serves as a self-audit to identify the association's key documents, policies, and resources.

The Association Executive (AE) should complete this checklist and note items that may be missing or need updating to help the association have a complete and accurate repository of important information.

It is recommended that the AE establish a central location for hard copies of any documents outlined below, as well as digital copies saved in one central location on the association's server.

## INSTRUCTIONS

This checklist is in alphabetical order. Complete this checklist by answering the questions and locating the proper documentation associated with the prompt.

Keep a copy of this checklist as the table of contents for your hard copy repository and your digital files.

## SECTIONS

- ▶ Articles of Incorporation
- ▶ Association Historical Documents
- ▶ Business License
- ▶ Charitable Solicitation
- ▶ Core Standards
- ▶ Dues and Fees
- ▶ Education and Designation Training
- ▶ External Communication
- ▶ Facilities/Adequacy
- ▶ Financial Policies and Procedures, Accounting Controls and Audit
- ▶ Fixed and Moveable Assets
- ▶ Governing Documents
- ▶ Government Affairs
- ▶ Identification and Development of New Leaders
- ▶ Insurance Policies
- ▶ Internal Communication
- ▶ IRS and Tax Documents
- ▶ Legal Action Funds
- ▶ Legal Services
- ▶ Lockboxes
- ▶ Media and Public Relations
- ▶ Meetings and Events
- ▶ Membership
- ▶ Membership Systems
- ▶ MLS/Information Services
- ▶ Office Equipment
- ▶ Professional Standards and Mediation
- ▶ REALTORS® Political Action Committee (RPAC)
- ▶ Relationship with State and National Associations
- ▶ Research and Statistics
- ▶ Reserves and Restricted Accounts
- ▶ Staff Positions
- ▶ Staff Training
- ▶ Strategic Planning
- ▶ Technology and Data Security
- ▶ Website

# ARTICLES OF INCORPORATION

- ▶ When was the association incorporated? \_\_\_\_\_
- ▶ Last update with the Secretary of State. \_\_\_\_\_
- ▶ Secretary of State update requirements. \_\_\_\_\_

# ASSOCIATION HISTORICAL DOCUMENTS

(If unable to locate, call NAR at 1-800-874-6500)

- ▶ Association's NAR Charter:      Digital      Hard Copy      N/A

# BUSINESS LICENSE

- ▶ Does the association require a business license for operation?  
Yes      No
- ▶ Does the association operate unrelated business income products/projects?  
Yes      No
- ▶ If the association operates a store, does that require a business license?  
Yes      No
- ▶ Does the association allow room rentals?  
Yes      No
  - If so, has the association filed the proper paperwork (if required)?  
Digital      Hard Copy      N/A
- ▶ Do you have an outline of the sales tax procedures for the association?  
Yes      No

# CHARITABLE SOLICITATION



▶ Does the state require the association to register to collect charitable contributions?

Yes                      No

▶ If so, check status of current certificate:

Digital              Hard Copy              N/A

▶ Has all the required paperwork been filed for the association’s foundation?

Yes                      No

▶ If so, check status of copies of paperwork:

Digital              Hard Copy              N/A

# CORE STANDARDS



▶ Who is responsible for tracking the association’s fulfillment for Core Standards and completing the Core Standards compliance tool?



▶ What is the state association’s submission deadline for Core Standards?



▶ Are the proper people set up to review Core Standards in the Core Standards compliance tool?

Yes                      No



# DUES AND FEES



▶ Date of annual dues billing:  
\_\_\_\_\_

▶ Due date of annual dues billing:  
\_\_\_\_\_

▶ What kind of billing does the association administer?  
Annual                  Semi-annually  
Quarterly              Monthly

▶ Document all membership dues and fee types and their rates such as: designated REALTOR® dues, REALTOR® dues, application fees, affiliate dues, late fees, MLS fees, lockbox fees, etc. How are these records kept?

Digital                  Hard Copy                  N/A

▶ Create or locate a five-year membership trends chart:

Digital                  Hard Copy                  N/A

# EDUCATION AND DESIGNATION TRAINING



▶ Does the association have a Center for REALTOR® Development (CRD) license or access to one through a partnering local or state association?

(Find out more about the license to offer NAR designation/certification courses at [nar.realtor/Education](http://nar.realtor/Education)).

Yes                  No

▶ Does the association offer online CE courses?

Yes                  No

▶ What is the association’s education calendar planning method and what is the education committee’s involvement (if applicable)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Does the association have any partnerships with an online education provider?

Yes                  No

# EXTERNAL COMMUNICATION



- ▶ What methods does the association use to communicate with members?

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- ▶ How does the association track the effectiveness of their communication methods?

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- ▶ How does the association survey its members?

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- Provide a copy and location of the policy surrounding association survey use:

Digital      Hard Copy      N/A

- ▶ Locate the association's social media policy:

Digital      Hard Copy      N/A

- ▶ Does the association's social media policy extend to all members?

Yes      No

- ▶ Does the association have a value proposition that communicates the association's value of programs and services to its members?

Yes      No



# FACILITIES/ADEQUACY



▶ Does the association have a disaster recovery plan?

Yes                      No

■ Provide a copy of the plan:

                    Digital              Hard Copy              N/A

▶ If the association rents, rather than owns, office space, provide a copy of the lease and floor plan:

                    Digital              Hard Copy              N/A

▶ Does the association rent any of the facilities within its office?

Yes                      No

■ If so, provide a copy of the rental agreement and policies:

                    Digital              Hard Copy              N/A

▶ Who has keys to the association office?

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▶ Who is responsible for office maintenance, cleaning, etc.?

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▶ Is the office insured?

Yes                      No

■ Provide a copy of the insurance:

                    Digital              Hard Copy              N/A

▶ Is the office subject to ADA compliance?

Yes                      No

■ If so, is the association in compliance?

                    Yes                      No

▶ Are there shared maintenance agreements and service agreements for the building?

Yes                      No

▶ Are there any Common Area Maintenance (CAM) billings?

Yes                      No

■ If so, provide copies of the agreements and most recent billing:

                    Digital              Hard Copy              N/A

# FINANCIAL PROCEDURES, ACCOUNTING CONTROLS AND AUDIT



▶ Locate all financial policies, and their last date of change:

Digital      Hard Copy      N/A

■ Date of last update.

\_\_\_\_\_

▶ What financial management program does the association use?

\_\_\_\_\_

■ Who has access to the financial management program?

\_\_\_\_\_

■ Is the financial management program integrated with NAR?

Yes                      No

▶ What type of budgeting does the association utilize?

\_\_\_\_\_

▶ Locate the association's current year budget:

Digital      Hard Copy      N/A

▶ Locate last two year-end financial reports:

Digital      Hard Copy      N/A

▶ Locate last audit, review, or compilation:

Digital      Hard Copy      N/A

▶ Locate previous month's financial report:

Digital      Hard Copy      N/A

▶ Locate last tax return and date of filing:

Digital      Hard Copy      N/A

■ Date of last update.

\_\_\_\_\_





# FIXED AND MOVABLE ASSETS



▶ Provide the most recent list of assets and their depreciation schedule:

Digital      Hard Copy      N/A

▶ How does the association track fixed and movable assets?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# GOVERNING DOCUMENTS



Locate and provide copies and last date of change for the following:

▶ Association Bylaws

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ Committee Chair, Vice Chair, and Member Position Descriptions

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ Association Policies and Procedures Manual

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ MLS Bylaws (if a corporation, and applicable)

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ Leadership Position Descriptions

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ MLS Rules and Regulations

Digital      Hard Copy      N/A

■ Date of Last Change:  
\_\_\_\_\_

▶ Personnel Policies and Employee Handbook

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Document Retention Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Financial Policies

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Reserve Policies

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Travel Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Harassment Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Whistleblower Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Social Media Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Whistleblower Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Cyber Security Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Professional Standards Manual and Policies

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Crisis Management Plan and Emergency Procedures

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Conflict of Interest Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Antitrust Policy

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Any Shared Services Agreements

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Any Reciprocity Agreements

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Data Sharing Agreements

Digital      Hard Copy      N/A

■ Date of Last Change:

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▶ Other Documents (describe):

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# GOVERNMENT AFFAIRS



- ▶ Provide a description of the association's lobbying efforts within your jurisdiction:

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- ▶ Who is responsible for the association's lobbying and government affairs efforts?

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- ▶ If the association is in a shared services agreement for government affairs, provide the copies of the shared services agreement and when it was last reviewed:

Digital      Hard Copy      N/A

- Date of Last Legal Review:

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- ▶ How does the association track local legislative issues?

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- ▶ Provide a list of the association's key contacts for state legislators:

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- ▶ How does the association use Calls to Action and what is the method for dissemination?

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- ▶ What is the process and structure for screening candidates and where is this process documented?

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- ▶ Does the association have a specific legislative/government affairs newsletter or communication method?

Yes                      No

- ▶ Does the association use Aristotle and who is trained to use Aristotle?

Yes                      No

- Name of Trained Staff.

\_\_\_\_\_

- ▶ Did the association's Government Affairs Director and/or AE attend NAR's GAD Orientation?

Yes                      No

- ▶ Does the GAD and/or AE attend NAR's annual GAD Institute?

Yes                      No

## IDENTIFICATION AND DEVELOPMENT OF NEW LEADERS

- ▶ When is the association's election(s)?

\_\_\_\_\_

- ▶ What is the association's nominating process?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- ▶ Provide a copy of the association's calendar for association election and nomination process dates:

Digital              Hard Copy              N/A

- ▶ Does the association have a nominating committee?

Yes                      No

- If so, provide copies of committee responsibilities and policies for leadership and nominating:

Digital              Hard Copy              N/A

- ▶ Does the AE/chief staff executive and the president-elect attend the NAR Leadership Summit?

Yes                      No

- ▶ Does the state association offer any leadership training?

Yes                      No

- ▶ Provide an overview of the association's plan for identifying new leaders:

\_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ What are the annual training requirements for association leadership and the board of directors?

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▶ What is the association’s plan to ensure diversity amongst leadership?

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▶ Do association leaders sign confidentiality agreements and/or conflict of interest statements?

Yes                      No

■ If so, provide copies of these statements:                      Digital                      Hard Copy                      N/A

## INSURANCE POLICIES

▶ Locate the most recent NAR Insurance Program information:

Digital                      Hard Copy                      N/A

▶ Did the association purchase excess E&O, D&O, and workers’ compensation policies?

Yes                      No

■ If so, has the paperwork been saved properly?

Digital                      Hard Copy                      N/A

Expiration Date(s):

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▶ Does the association have property and casualty insurance?

Yes                      No

■ If so, has the paperwork been saved properly?

Digital                      Hard Copy                      N/A

Expiration Date(s):

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▶ Does the association have natural disaster insurance?

Yes                      No

■ If so, has the paperwork been saved properly?

Digital                      Hard Copy                      N/A

Expiration Date(s):

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# INTERNAL COMMUNICATION



▶ Copy of the completed President/ AE Checklist from the current year:

Digital      Hard Copy      N/A

▶ Does the association have internal communication policies and procedures?

Yes                  No

■ If so, provide a copy of the policy:      Digital      Hard Copy      N/A

# IRS AND TAX DOCUMENTS

(If unable to locate information, call the IRS or work with your association’s accounting professional)



▶ Is the association for-profit or nonprofit?

\_\_\_\_\_

▶ What is the association’s tax filing status?

\_\_\_\_\_

▶ Is a copy of the determination status letter readily available?

Digital      Hard Copy      N/A

▶ Does the association operate other entities or corporations (i.e. foundations, MLS)?

Yes                  No

▶ If so, do other entities or corporations pay UBIT (Unrelated Business Income Tax) taxes?

Yes                  No

▶ Form 990 and/or 990T and/or Form 1120:

Digital      Hard Copy      N/A

▶ “Public Inspection Copy” for Form 990:

Digital      Hard Copy      N/A

▶ Copy of most recent tax return:

Digital      Hard Copy      N/A

# LEGAL ACTION FUNDS



▶ Does the association purchase excess insurance coverage for legal defense?

Yes                      No

▶ Does the association have funds set aside for legal defense?

Yes                      No

▶ Does the association have policies and procedures in place if a lawsuit is brought against the association?

Yes                      No

■ Provide a copy of the policies and procedures:

Digital                  Hard Copy                  N/A

▶ Identify what legal action funds are available through the state association and NAR:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# LEGAL SERVICES



▶ Who is the association’s legal counsel?

\_\_\_\_\_

▶ Who reviews contracts and agreements?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Does association membership have access to a legal hotline?

Yes                      No

■ If so, how?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



- ▶ Does the association have policies on who signs contracts and leases?

Yes                      No

- Provide a reference sheet for these policies:

Digital              Hard Copy              N/A

- ▶ What meetings does association's legal counsel sit in on?

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## LOCKBOXES

- ▶ Does the association have a lockbox system in place?

Yes                      No

- ▶ If so, is it a service of the association or the MLS?

Association              MLS              N/A

- ▶ Who is the association's lockbox vendor?

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- ▶ When does the lockbox vendor contract expire? Provide a copy and location:

Digital              Hard Copy              N/A

Expiration Date(s). \_\_\_\_\_

- ▶ What type of lockboxes does the association offer?

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- ▶ What is the association's lockbox replacement policy?

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- Provide a copy of the policy and the location:

Digital              Hard Copy              N/A

- ▶ Does the association follow the Lockbox Security Requirement in the current *NAR Handbook on Multiple Listing Policy*?

Digital              Hard Copy              N/A

# MEDIA AND PUBLIC RELATIONS



▶ Does the association have a media and/or public relations policy?

Yes                      No

■ If so, provide a copy of the policy:            Digital            Hard Copy            N/A

# MEETING AND EVENTS



▶ What meetings are required by the association's bylaws?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ What is the association's annual meeting requirement?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Does the association have any meeting and event policies?

Yes                      No

■ Provide copies of the policies:

                         Digital            Hard Copy            N/A

▶ Does the association have special event insurance or any event riders (i.e. alcohol at events)?

Yes                      No

■ Provide a copy of policies:

                         Digital            Hard Copy            N/A



# MEMBERSHIP



- ▶ What member types are in the association’s bylaws and what services are provided to them?

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# MEMBERSHIP SYSTEMS



- ▶ What membership system (AMS) do you use?

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- ▶ Who is the Point of Entry (POE) for the association’s REALTORS® M1?

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- ▶ Who has POE login and access information?

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- ▶ What is the association’s REALTORS® M1 ID?

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- ▶ What is the state association’s REALTORS® M1 ID?

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# MLS/INFORMATION SERVICES



- ▶ Does the association operate its own MLS or is it a part of a regional MLS?

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- ▶ Is the MLS a committee or separate corporation?

Committee      Separate Corporation

- ▶ Who is the association's MLS vendor?

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- ▶ When does the association's MLS vendor contract expire?

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- ▶ Does the association have licensing agreements with third party vendors?

Yes                  No

- ▶ Describe the ancillary agreements related to your MLS:

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# OFFICE EQUIPMENT



- ▶ Locate descriptions, including age, functionality, and replacement process for all office equipment, such as phone system, computers, laptops, printers/copiers, and software subscriptions/contracts:

Digital      Hard Copy      N/A

- ▶ Locate all office equipment contracts and create a summary of their expiration dates and if they auto renew:

Digital      Hard Copy      N/A

- ▶ What is the association's capital expense policy?

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- Provide a copy of the policy:

Digital      Hard Copy      N/A

▶ Does the association have an equipment log for all staff computers, laptops, and equipment?

Yes                      No

■ If so, provide a copy:

Digital              Hard Copy              N/A

▶ Does the association have an association property log for staff?

Yes                      No

■ If so, provide a copy:

Digital              Hard Copy              N/A

# PROFESSIONAL STANDARDS AND MEDIATION

▶ Is the association currently participating in a cooperative agreement to administer professional standards?

Yes                      No

■ If so, provide a copy:

Digital              Hard Copy              N/A

▶ What is the current Code of Ethics cycle and when does it end?

\_\_\_\_\_

▶ Date of last professional standards training:

\_\_\_\_\_

▶ Is the association in a regional cooperative agreement for professional standards?

Yes                      No

■ If so, provide copy of agreement:

Digital              Hard Copy              N/A

▶ Provide a list of the association's professional standards administrators:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Locate a copy of the association's grievance committee policy and professional standards policy:

Digital              Hard Copy              N/A

▶ Date of last mediator and ombudsman training:

\_\_\_\_\_

▶ Date of last adoption of mandatory changes NAR Code of Ethics and Arbitration Manual:

\_\_\_\_\_

▶ Number of trained mediators:

\_\_\_\_\_

▶ Number of cases heard in past 12 months:

\_\_\_\_\_

# REALTORS® POLITICAL ACTION COMMITTEE (RPAC)



▶ Did the association meet their most recent RPAC goals?

Yes                      No

▶ Does the state association set aside funds for local associations to use in their local RPAC efforts?

Yes                      No

■ If so, provide a copy of the request process for use of funds:

Digital                  Hard Copy                  N/A

▶ Does the state association ask for local association input on state legislative issues and elections?

Yes                      No

▶ Does the association have a regional RPAC trustee?

Yes                      No

■ If so, who is the trustee?

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▶ Has the association participated in any REALTOR® Party Initiatives?

Yes                      No

■ If so, how are those initiatives funded?

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▶ How are Issues Mobilization Campaigns funded and how can the association go about requesting funds?

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# RELATIONSHIP WITH STATE AND NATIONAL ASSOCIATION



▶ Which leaders travel and represent the association at state and/or NAR meetings?

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■ If any, provide a copy of the policy outlining attendance:

Digital      Hard Copy      N/A

▶ Is there a reimbursement process for board of director members or any other association members to attend state and/or NAR meetings?

Yes                  No

■ If so, provide a copy of the reimbursement and attendance policy:

Digital      Hard Copy      N/A

▶ Who serves as the association's delegate on the NAR Delegate Body?

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▶ Locate copies of certifying process for state committee appointments:

Digital      Hard Copy      N/A

▶ Locate copies of allocation process for state and/or NAR appointments:

Digital      Hard Copy      N/A

▶ Locate a copy of policies that outline the appointment/election process for state association and/or NAR directors:

Digital      Hard Copy      N/A



# RESEARCH AND STATISTICS



▶ Does the association provide research and statistics to membership?

Yes                      No

▶ Other than membership, who does the association provide research and statistics to?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Who provides the association’s statistical data (i.e. Regional MLS)?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Does the association use NAR’s or their state association’s statistical data?

Yes                      No

# RESERVES AND RESTRICTED ACCOUNTS



▶ Locate / identify all accounts, the organization that holds the account, and their logins. Such as, operational account, building account, issues mobilization fund, legal action fund, education fund, savings account, investment account, etc:

Digital                  Hard Copy                  N/A

▶ Locate / identify any reserve and/or restricted accounts the association has:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# STAFF POSITIONS



▶ Provide copies of staff position descriptions and their last date of update:

Digital      Hard Copy      N/A

■ Date of Last Change: \_\_\_\_\_

▶ Location of Employee Handbook and date of last legal review:

Digital      Hard Copy      N/A

■ Date of Last Change: \_\_\_\_\_

▶ Provide copy of association remote work policy:

Digital      Hard Copy      N/A

■ Date of Last Change: \_\_\_\_\_

▶ Are the required federal, state, and OSHA employment posters and notices current and prominently displayed?

Yes                  No

# STAFF TRAINING



▶ Does the AE/chief staff executive attend NAR's AE Institute (AEI)?

Yes                  No

▶ What team training occurs annually?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

▶ Has the staff completed NAR's REALTOR® Association Management Self-Study Courses?

Yes                  No

▶ Date of the most recent antitrust training:

\_\_\_\_\_

▶ Date of the most recent harassment training:

\_\_\_\_\_

▶ Date of the most recent safety training:

\_\_\_\_\_

▶ Date of the most recent DEI training:

\_\_\_\_\_

▶ Date of the most recent technology training:

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▶ What state and/or national trainings are staff eligible to attend?

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▶ Does the association reimburse for professional development?

Yes

No

## STRATEGIC PLANNING

▶ How often is the association's strategic plan updated?

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▶ How often does the board of directors review the strategic plan?

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▶ Are strategic plan goals and strategies prioritized and allocated to committees and/or staff for implementation?

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▶ Does the association's strategic plan drive your budget?

Yes

No

▶ What is the association's mission and vision statement?

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# TECHNOLOGY AND DATA SECURITY



▶ What is the association's backup procedures for data?

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▶ Who manages the association's technology and IT services?

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# WEBSITE



▶ When was the association's website last revamped?

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▶ Has the association taken steps to make the website accessible?

Yes                      No

▶ Who maintains the association website?

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▶ Who is the key contact for the association's website?

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▶ Who hosts the association's website?

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▶ Provide a list of the association's registered domains:

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