**INSTRUCTIONS:** To be considered for a grant from the Leonard P. Reaume Foundation, interested grantees must first complete the Needs Assessment for Interested Grantees. This provides the Foundation Board of Directors with essential information about your association to ensure they consider the appropriate use for any grant funds approved.

Please type your answers into the document. If you would like to expand upon any of your answers, please attach additional typed pages. **Submit a completed form to Karen Williams, staff executive to the Foundation, at** **kwilliams@nar.realtor**. Contact Ms. Williams with questions.

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| **ASSOCIATION ASSESSMENT** |
| ***OPERATIONS INFORMATION*** |
| Name of Association |  |
| Year Association Established |  |
| Association Executive (AE) on staff? | [ ]  Yes [ ]  No |
| If answered ‘Yes’: | [ ]  Full Time [ ]  Part Time |
| Number of Additional Staff |  |
| ***MEMBERSHIP INFORMATION*** |
| Number of Association Members |  |
| Membership Categories |  |
| General Criteria for Membership |  |
| Number of Brokers (Managers) |  |
| Number of Active/Dues Paying Agents |  |
| Total Annual Membership Revenue |  Currency: |

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| **MEMBER EDUCATION ASSESSMENT** |
| ***PROFESSIONAL STANDARDS/ETHICS*** |
| Do you provide Professional Standards/Ethics Training for your members? | [ ]  Yes [ ]  No |
| If answered ‘Yes’: |
| Date of last training |  |
| How often is training provided? |  |
| Is provided training mandatory? |  |
| Is there a Professional Standards Complaint Process in place? | [ ]  Yes [ ]  No |
| ***PRACTICAL SKILLS*** |
| **Working with Consumers** |
| In the past five (5) years, have you provided practical training on marketing to and working with sellers, buyers, landlords, tenants, etc.? | [ ]  Yes [ ]  No |
| If answered ‘Yes’: |
| Date of last training |  |
| How often is training provided? |  |
| Is provided training mandatory? |  |
| List five (5) most important trainings provided in recent years, noting the year provided. |  |
| **Risk Management/Compliance with Laws and Regulations** |
| In the past five (5) years, have you provided training to members on risk management and compliance with laws and regulations? | [ ]  Yes [ ]  No |
| If answered ‘Yes’: |
| Date of last training |  |
| How often is training provided? |  |
| Is provided training mandatory? |  |
| List and describe each risk management or compliance training offered in the last five (5) years. |  |
| **Mandatory Association Continuing Education** |
| Does the Association require mandatory Continuing Education? | [ ]  Yes [ ]  No |
| If answered ‘Yes’, please describe. |  |
| How often is Association mandatory education required? |  |
| Name of Association Staff Person responsible for Education and Training |  |

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| **COUNTRY ASSESSMENT** |
| Does the government/regulator require agents and/or brokers to be licensed? | [ ]  Yes [ ]  No |
| If answered ‘Yes’, please cite regulations. |  |
| Are there any other regulations/requirements once licensed? | [ ]  Yes [ ]  No |
| If answered ‘Yes’, please describe. |  |
| Does the government/regulator require mandatory Continuing Education? | [ ]  Yes [ ]  No |
| If answered ‘Yes’, please describe. |  |

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| --- | --- |
| Name of Submitter |  |
| Title/Role with Association |  |
| Date Submitted *(MM/DD/YY)* |  |
| Contact Information | Email: Phone:  |

*The Foundation Board of Directors thanks you for your effort in providing this essential information.*