

President/Association Executive Task List

To get the volunteer/staff year off to a good start, both team partners (the president and the association executive) need to define who will do what during the term. One way to enhance this dialogue between the president and AE is to discuss issues common to both. A job functions summary or task list can help you do this.

By working together on this summary, association presidents and AEs can gain a new perspective on their relationship. A structured format in which AEs and presidents share ideas and expectations about their jobs and lines of responsibility can help their relationship head in the right direction.

There are no "right" or "wrong" answers in this exercise. Answers may even change annually with each president's style, goals, and abilities. The important thing is for the president and AE to reach an agreement on who does what, thus encouraging a level of consistency in the relationship. Keep in mind that this list is not meant to be comprehensive. Feel free to add additional activities that may not be noted here.

Remember, the answers in a job functions exercise will vary by association size. In small associations, it is likely that most of the responsibilities and functions will fall on the shoulders of its elected leadership, since the AE may be the only staff or chiefly an office administrator. In larger associations, more of the responsibilities for publications, government relations, and media representation will be delegated to the AE and his or her staff.

It can be helpful for the president and AE to each keep a copy of this task list and refer to it throughout their leadership year together.



President/Association Executive Task List

Instructions: This section must be filled out by the local association president and the AE at the same time. The purpose of this section is to determine the division of duties between the elected leadership and association staff. Place an "X" in the appropriate space or spaces that indicate where the primary responsibility for each item exists.

AE Only	Other Association Staff	Elected Leadership Only	Joint Staff & Leadership	Vendor	N/A
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State/NAR Participation

1. Participates in association/regional caucuses.						
2. Provides input to association/regional officers relative to positions on state association/NAR issues.						
3. Recommends members for state association/NAR committee appointments.						
4. Serves on state association committees.						
5. Serves on NAR committees.						
6. Attends all state association directors' meetings.						
7. Attends all/some NAR meetings.						
8. Reviews and updates association bylaws.						
9. Other:						

Communications

1. Develops communication plan between president, AE, and staff.						
2. Directs media calls and questions to association leadership.						
3. Responds directly to media inquiries.						
*4. Writes/edits news releases.						
*5. Arranges press conferences.						
*6. Has editorial and content authority over association publications.						
*7. Writes articles for association publications.						
8. Establishes and maintains liaison with reporters and other media professionals.						
9. Coordinates special projects such as REALTOR® Safety Week, etc.						
10. Supervises staff specialists who execute any or all of the above duties.						
11. Other:						

** Be sure to understand the legal issues surrounding these activities (copyright, defamation, libel/slander).*

Community Involvement

*1. As an association representative, involved in community activities and civic organizations (chamber of commerce, ASAE chapter, downtown councils, etc.)						
2. Serves on local governmental and civic advisory bodies (city government, school districts, charitable organizations, real estate advisory groups, and so on).						
3. Other:						

** NAR's professional liability insurance coverage is not available to a member or an association executive when he/she serves on the board of another organization at the request of the local or state REALTOR® association.*

President/Association Executive Task List	AE Only	Other Association Staff	Elected Leadership Only	Joint Staff & Leadership	Vendor	N/A
Membership Education*						
1. Solicits/reviews information about prospective education courses and educational speakers for presentation to members.						
2. Reviews and discusses such information with education committee.						
3. Organizes/schedules live and on-line continuing education courses and test processing.						
4. Supervises other staff specialists who perform any or all of the above duties.						
5. Other:						
<i>* Education courses must comply with the Americans with Disabilities Act.</i>						
Financial Management						
1. Independently develops annual budget.						
2. Develops annual budget, accompanied by substantial assistance and direction of leadership.						
3. Performs all bookkeeping and accounting duties.						
4. Performs most bookkeeping and accounting duties.						
*5. Supervises staff bookkeeper or outside accountant.						
*6. Produces monthly financial statement.						
*7. Reviews monthly financial statement produced by bookkeeper and/or accountant.						
8. Analyzes monthly financial statement and provides narrative report summarizing financial performance and explaining reasons for deviations from budget.						
9. Supervises association savings accounts and investments.						
10. Develops and implements investment strategies.						
**11. Conducts/implements financial management in accordance with long-range planning guidelines.						
12. Supervises other staff specialists or managers in the performance of any or all of the above activities.						
13. Other:						
<i>* There is a need for regular audits and having a check and balance system in place so that financial mismanagement does not become a problem.</i>						
<i>** The association executive or elected leadership should follow an investment policy.</i>						

President/Association Executive Task List	AE Only	Other Association Staff	Elected Leadership Only	Joint Staff & Leadership	Vendor	N/A
Government and Political Affairs						
1. Conducts research for and writes testimony to be given by association leadership at public hearings conducted by elected officials and governmental agencies.						
2. Delivers testimony at public hearings on behalf of the association.						
3. Researches and writes association position statements and policies related to governmental issues.						
4. Composes correspondence to elected officials on various issues for association leadership signature.						
5. Deals directly with elected officials, regulatory personnel, and governmental agencies on behalf of the association.						
6. Attends and is a participant in NAR's Midyear Legislative meetings in Washington, D.C.						
7. Serves as the association's designated legislative advocate.						
8. Supervises other staff specialists in the performance of any or all of the above activities.						
9. Other:						
Grievance/Professional Standards/DRS/Mediation						
1. Processes complaints and applications for ethics and arbitration hearings, including mediation.						
2. Helps select hearing panel members.						
3. Schedules hearings.						
4. Provides technical support to grievance and professional standards committees.						
5. Interfaces with complainants and respondents.						
6. Writes warning/hearing decision letters as directed by professional standards panel.						
7. Keeps up-to-date on new state and NAR developments in the areas of grievance and professional standards.						
8. Interacts directly with state and NAR legal counsel and staff on questions related to the Code of Ethics, professional standards, arbitration, and grievance procedures.						
9. Supervises specialists, association ombudsman, or department heads who execute some or all of the above duties.						
10. Administers consumer dispute resolution program.						
11. Other:						

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Interaction with Outside Organizations and Vendors													
1.	Is authorized to interact/consult with association legal counsel independently without seeking prior permission of association leadership.												
2.	Interacts/consults with state association services and policy division.												
3.	Interacts with supervisory personnel of MLS vendor.												
4.	Works with outside accountant.												
5.	Hires/executes contracts with association office maintenance firms (janitorial, landscaping, and so on).												
6.	Interacts directly with lockbox vendor.												
7.	Interacts directly with vendors and consultants who provide other association services (computer equipment servicing, insurance, air-conditioning/heating, plumbing, and so on).												
8.	Supervises other staff specialists and/or department heads who execute any or all of the above duties.												
9.	Other:												
Membership													
1.	Participates in all new member orientation sessions.												
2.	Helps plan and design format of new member orientation program.												
3.	Visits member offices to give presentations on association membership benefits and activities (or trains staff members to do the same).												
4.	Performs basic function of processing membership applications, including transmittal to state associations.												
5.	Assists membership committee by investigating applications.												
6.	Maintains membership files via NRDS.												
7.	Supervises staff membership director, who performs any or all of the above duties.												
8.	Supervises operation of association store (assuming association store is considered a membership benefit).												
9.	Responsible for entire store operation (ordering, vendor contract, inventory, and so on).												
10.	Interacts directly with state association/NAR on membership issues.												
11.	Readily accessible to general membership on a daily basis.												
12.	Other:												

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Multiple Listing Service												
1.	Performs all basic MLS functions: listing input, book preparation, hot-sheet production, maintains MLS database, etc.											
2.	Performs all functions related to vendor relations, including invoicing, maintaining on-line database, and so on.											
3.	Processes allegations of MLS rules and regulations violations.											
4.	Ensures that MLS rules and regulations conform to NAR policy.											
5.	Develops and supervises implementation of MLS administrative office procedures and policies.											
6.	Conducts training sessions for participants and subscribers on how to correctly use the various MLS services.											
7.	Supervises MLS department staff or MLS supervisor.											
8.	Administers lockbox/key services.											
9.	Coordinates reciprocal MLS activities with other local associations in the region.											
10.	Other:											
Personnel Administration												
1.	Responsible for conducting periodic employee performance evaluations.											
2.	Conducts salary review of staff and determines salary increases and bonuses.											
3.	Has authority to hire and dismiss all employees.											
4.	Responsible for training all staff members.											
5.	Conducts periodic department head/staff meetings.											
6.	Writes personnel/employee manual, has the document reviewed by legal counsel or other authorities, and is responsible for periodically reviewing and updating manual.											
7.	Supervises staff specialist or department head responsible for any or all of these functions.											
8.	Conducts investigations relating to allegations of sexual, racial, and religious harassment.											
9.	Other:											
Staff Development												
1.	Selects and budgets for continuing education classes for improving employee skills and job performance.											
2.	Other:											

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Miscellaneous						
1. Prepares executive committee and/or board of directors agendas prior to meetings.						
2. Attends all executive committee and/or board of directors meetings.						
3. Offers input to executive committee and/or board of directors as necessary.						
4. Submits monthly reports of activities to board of directors.						
5. Participates in an annual discussion of the strategic plan.						
6. Manages property owned by association, including tenant management.						
7. Other:						

This chart was adapted with permission from the California Association of REALTORS®.

cbair/manuals/presidentaetasklistjuly07.doc