

**MASSACHUSETTS ASSOCIATION OF REALTORS®
PRESIDENT'S PREFERENCE CHECKLIST**

Each year, MAR's President and Executive Vice President should jointly complete this checklist to determine the division of duties between elected leadership and association staff, as well as the personal preferences/style of the incoming president. Asterisk (*) indicates typical method.

COMMUNICATION

1. Handling of mail addressed to President
 Forward to President unopened
 *Only mail labeled "confidential" is forwarded to President unopened. EVP reviews non-confidential mail, and either forwards or contacts President at EVP's discretion, with suggested response, for review by President.
 Other _____

2. Media Contacts
 Refer all contacts to President
 EVP and appropriate staff respond to all media inquiries
 * EVP and appropriate staff refer to President, Executive Vice President, President-elect, AG Chairs/leaders or other staff, as appropriate
 Other _____

3. Letter Signing
 Send all letters bearing President's signature to President to sign
 Staff signs for President
 Use computer-generated signature
 * Contact President on case by case basis
 Other _____

4. Signing of Certificates (eg. GRI and others)
 Send all respective certificates to the President for signature
 Staff signs for President
 Use computer-generated signature
 * Contact President on case by case basis
 Other _____

5. President's Quotations in News Releases, etc.
 * Staff prepares quote for approval by President
 Obtain quote directly from President
 Prefer NOT being quoted
 Other _____

6. Articles in MAR Publications
 _____ President writes own articles for magazines
 _____ * Staff prepares articles for editing by President
 _____ Prefer NOT including article by President
 _____ Other _____
7. Speeches
 _____ *Staff prepares word for word speech
 _____ Staff prepares speech outline and notes only
 _____ President prepares his own speeches
8. Best way to communicate with you (rank in order of preference)
 _____ Email
 _____ Cellphone
 _____ FAX
 _____ Regular Mail
 _____ Through my assistant (Name and Email: _____)
 _____ Other: _____

MEETINGS

1. Agendas for ExecCom and Board of Directors meetings
 _____ President develops (for review by EVP and staff)
 _____ *EVP and staff develop, for approval by President
 _____ EVP and staff develop - no Presidential review
 _____ Other _____
2. Minutes of ExecCom and Board of Directors meetings
 _____ *President approves before distribution
 _____ EVP approval is sufficient
 _____ Other _____
3. Attendance at meetings of Committees and other groups
 _____ * Send agenda and minutes only
 _____ Send notice and agenda and I may attend
 _____ Just send minutes of the meeting (I generally don't plan to attend)
 _____ Just fill me in at Leadership Team meetings
 _____ Other _____
4. Leadership Team Meetings
 _____ * Plan to meet 1 hour before each ExecCom and BOD meeting
 _____ Plan to meet by conference call on day prior to each Exec and BOD mtg.
 _____ * Plan to meet during each NAR conference

___ Other _____

5. Two-day Annual Conference/Convention (aka Professional Development Day)
- ___ Kick off the program
 - ___ Speak at key general sessions and social events
 - ___ Introduce speakers at key general sessions
 - ___ Attend but prefer no formal duties

LOCAL RELATIONS

- 1 Attendance at Local Installations
- ___ President plans to attend all local installations where invited
 - ___ * President will designate which local installations he/she will attend, if invited
 - ___ President would prefer NOT to attend local installations (Other officer should)
 - ___ Other _____
2. Participation at Local Installations
- a) Spouse/guest will attend ___all, ___some, ___no Local Association installations.
 - b) President would ___ would not ___ like to give a brief speech, if time allows.
 - c) President is willing to:
 - ___ * be installing officer
 - ___ give the invocation
 - ___ lead the Pledge of Allegiance
 - ___ other appropriate responsibility
 - ___ Other _____
3. Other Local Speaking Engagements
- ___ Would like to give MAR/State Update at Local Association meetings
 - ___ Would provide MAR/State Update if invited (but don't solicit)
 - ___ Would prefer NOT attending other Local Association meetings
 - ___ Other _____
4. All requests for President to visit a Local Association should:
- ___ be sent to President directly and he/she will follow up
 - ___ *be handled by MAR staff (Exec Asst) after coordination with President
 - ___ Other _____
5. Meetings with Local Association Leaders (check all desired)
- a) ___ Schedule dinners with Local President/AE at each NAR meeting
 - b) ___ Other _____

GOVERNMENT RELATIONS

1. Testimony at State House, Real Estate Board, etc.
 President plans to be in Boston to testify as much as possible, when needed
 * Select other appropriate member and/or staff for testimony, except when President in particular is needed
 Other _____

2. RPAC
 President would like to attend Political Candidate fundraising events
 President will attend only under the following circumstances:
 Only candidates of _____ political party
 Only for key political leadership
 Other _____

GENERAL

1. What day(s) of the week would you prefer NOT to attend MAR meetings?

2. Who in your office always knows how to reach you, or can get a message to you?
_____ Title _____ Phone _____

3. I understand that MAR staff will always register me (meeting registration and hotel) for MAR and NAR meetings, but that I will make my own air travel arrangements unless I specifically ask for help in this area. I prefer the following sleeping arrangements (for registration purposes):
 One double bed
 Two double beds
 King size bed

4. Would you like to have MAR business cards showing you as President of MAR, with MAR's address, your business address etc.? Yes No
If yes, what else would you like on card? _____

5. Please list anything additional that you would like MAR staff to know in order to make your term as President more productive and enjoyable:

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YOUR ROLES AS MAR PRESIDENT-ELECT AND PRESIDENT

The following is a general roadmap to prepare for your years as President-Elect and President of the Massachusetts Association of REALTORS®. Please make notes along the way, and let us know what else to add for future Presidents.

Key Documents to review before taking office:

- Your own office Position Description
- MAR Bylaws
- MAR Budget
- Board of Directors Rules of Procedure
- MAR Values Statement (found at bottom of all agendas)
- MAR Strategic Plan
- MAR Policies and Procedures
- MAR Public Policy Statement
- Minutes of last year's Board of Directors meetings
- Robert's Rules of Order "Quick Reference Card"

YOUR YEAR AS PRESIDENT-ELECT

President-Elect Memberships

- The President Elect automatically is a member of the Leadership Team, Executive Committee and Board of Directors
- MAR also reserves one of its NAR Director positions for the President-Elect each year (one year term) and is a member of the New England REALTORS® Committee (NERC).

President Elect Timetable

January

____ Take office on January 1. Obtain MAR business cards and name badge earlier. MAR's fiscal year begins and new budget is in place.

____ Demonstrate leadership by submitting RPAC contribution early

____ Begin to accumulate business cards from REALTORS interested in MAR appointments

____ Attend MAR's Leadership Conference

____ Attend remaining Local Association installations, if invited.

February

____ Attend first Finance and Executive Committee meetings (typical), after LT briefing.

March

____ Attend New England REALTORS Conference

____ Decide MAR Installation details (eg. location, installing officer(s), MCs, etc. (with CEO and Exec Programs Mgr)

April

____ Attend second Finance and Executive Committee meetings (typical), after LT briefing.

____ Attend certain Regional Caucuses, as agreed with LT.

____ Attend first Board of Directors meeting

- RVP Roundtable
- Leadership Team Briefing
- BOD Meeting

____ Complete NAR Committee application online

May

____ NAR MidYear Meeting and Legislative Conference, D.C. You will:

- Attend MAR LT Briefing with staff
- Attend State Association Forum and Medium State Subforum with President and CEO
- Attend Member & Directors Forum
- Attend the Massachusetts Receptions, held in MAR suite
- Attend New England REALTORS Committee luncheon (elect NAR Nominating Committee representative)
- Attend Massachusetts NAR Directors Caucus
- Attend Region I Caucus
- Attend MAR lunches/breakfast with other invited state Leadership Teams, if planned.
- Informally meet with Local Association Presidents-Elect in suite, if desired.

June

____ Meet with Past Presidents Advisory Group to identify future MAR leaders.

____ Attend Cape & Islands Installation if possible

___Attend Day on Beacon Hill

___Attend Strategic Planning review or retreat, prior to annual budget cycle

July

___Attend MAR annual budget planning meeting

___Begin to select/contact members to serve as Focus VPs and committee chairs, after consulting with CEO, incoming President Elect and others.

August

___Attend annual NAR Leadership Summit (Chicago) with CEO, followed by NERC luncheon.

___ Complete “MAR President Preference List”, indicating your preferences about correspondence, handling media inquiries, etc

___Attend third MAR Finance and Executive Committee meeting, after LT briefing.

___ Participate in the selection committee meeting for the Milt Shaw Award

___ Participate in the selection committee meeting for REALTOR of the YEAR® (only if you are a past state recipient in the last 3 years)

September

___ Attend Regional Caucuses, as agreed with LT.

___Attend second Board of Directors meeting

- RVP Roundtable
- Leadership Team Briefing
- BOD Meeting

October

___Attend MAR Annual Convention and Awards Banquet

___MAR Committee applications due

November

____Meet with Incoming President Elect, Chief Executive Officer and Key Staff to make appointments for committees and any task forces, and decide on any special Focus areas.

____Review Inaugural speech with CEO, if desired (15-20 minutes suggested)

____ Establish Calendar of Events/Deadlines with CEO and Executive Programs Manager. Includes ExecCom and BOD meeting dates.

____Address Leadership Academy students at final retreat

____NAR Annual Convention. You will:

- Attend MAR LT briefing with staff
- Attend State Association Forum and Medium State Subforum with President and CEO
- Attend Member & Directors Forum
- Attend NAR Installation (formal)
- Attend the MAR Receptions, held in MAR suite
- Attend Region 1 Luncheon, with President and CEO
- Attend Massachusetts NAR Directors Caucus
- Attend Region 1 Caucus
- Attend MAR lunches/breakfast with other invited state Leadership Teams, if planned
- Informally meet with Local Association Presidents-Elect in suite, if desired

December

____Attend Local Association installations, if invited

____Attend final MAR Finance and Executive Committee meetings, after LT briefing

____ Attend Regional Caucuses, as agreed with LT

____Attend final Board of Directors meeting

- RVP Roundtable
- Leadership Team Briefing
- BOD Meeting
- Recommend Committee Structure for upcoming year

____Participate in annual CEO Year-End Review

____Attend NERC Leadership Two-Day Meeting. Participate in spokesperson training.

YOUR YEAR AS MAR PRESIDENT

President Memberships

- The President automatically is a member of the Leadership Team; Executive Committee and Board of Directors
- Ex officio member of all Committees, except Leadership Development, REALTOR of the Year, Audit and C&E Foundation.
- The President automatically is a member of the National Association of REALTORS for one-year term (and shall resign from any ongoing NAR Director position to allow replacement) and is a member of the New England REALTORS® Committee (NERC).

President Timetable

January

____ Take office on January 1. Obtain MAR business cards and name badge earlier. MAR's fiscal year begins and new budget is in place.

____ Demonstrate leadership by submitting RPAC contribution early

____ Preside at MAR's annual Leadership Conference

____ Attend remaining Local Association installations, if invited.

February

____ Preside at first Finance and Executive Committee meetings, after LT briefing

March

____ Attend New England REALTORS Conference

April

____ Preside at second Finance and Executive Committee meetings (typical), after LT briefing.

____ Attend certain Regional Caucuses, as agreed with LT.

____ Attend first Board of Directors meeting

- Conduct Local Presidents Roundtable
- Leadership Team Briefing
- BOD Meeting

___ Complete NAR Committee application online

May

___ NAR MidYear Meeting and Legislative Conference, D.C. You will:

- Attend MAR LT Briefing with staff
- Attend State Association Forum and Medium State Subforum with President-Elect and CEO
- Attend Member & Directors Forum
- Host the Massachusetts Receptions, held in MAR suite
- Attend New England REALTORS Committee luncheon (elect NAR Nominating Committee representative)
- Preside over Massachusetts NAR Directors Caucus
- Attend Region I Caucus
- Attend MAR lunches/breakfast with other invited state Leadership Teams, if planned.
- Informally meet with Local Association Presidents in suite, if desired.

June

___ Meet with Past Presidents Advisory Group to identify future MAR leaders.

___ Attend Cape & Islands Installation if possible

___ Welcome members to Day on Beacon Hill

___ Attend Strategic Planning review or retreat, prior to annual budget cycle

July

___ Attend MAR annual budget planning meeting

August

___ Preside at third MAR Finance and Executive Committee meeting, after LT briefing.

September

___ Attend Regional Caucuses, as agreed with LT.

___ Attend second Board of Directors meeting

- RVP Roundtable
- Leadership Team Briefing
- BOD Meeting

October

___ Attend MAR Annual Convention and Awards Banquet. Give official welcome, certain dignitary introductions, etc.

___ MAR Committee applications due

November

___ Address Leadership Academy students at final retreat

___ NAR Annual Convention. You will:

- Attend MAR LT briefing with staff
- Attend State Association Forum and Medium State Subforum with President and CEO
- Attend Member & Directors Forum
- Attend NAR Installation (formal)
- Host the MAR Receptions, held in MAR suite
- Attend Region 1 Luncheon, with President-Elect and CEO
- Preside at Massachusetts NAR Directors Caucus
- Attend Region 1 Caucus
- Host MAR lunches/breakfast with other invited state Leadership Teams, if planned
- Informally meet with Local Association Presidents in suite, if desired

December

___ Attend Local Association installations, if invited

___ Preside at final MAR Finance and Executive Committee meetings, after LT briefing

___ Attend Regional Caucuses, as agreed with LT

___ Attend final Board of Directors meeting

- Conduct Local Association Presidents Roundtable
- Leadership Team Briefing
- BOD Meeting

___ Participate in annual CEO Year-End Review

A Few Caveats and Suggestions

- DO— MAR Policy requires that you submit expense reports within 60 days of the expense (no later than 6 months).
- DO— Maintain frequent communication with CEO and other Leadership Team members. MAR has used this “leadership team” approach for most major decisions or recommendations to ExecCom, BOD and otherwise.
- DO—Focus on conduct not content of Policy Board meetings. Chairman should avoid commenting on Motions, instead asking others to represent Leadership Team opinion. Keep discussion moving and all members involved.
- DON'T-- The President is not authorized to sign contracts or checks on behalf of MAR. Secretary-Treasurer may sign checks. Contract signing is responsibility of the Chief Executive Officer, or if not available MAR's Chief Counsel as appropriate.
- TOP TIPS FROM RECENT MAR PAST PRESIDENTS--
(to be added)

DISCUSSION TOPICS FOR PRESIDENT-ELECT MEETING WITH PAST-PRESIDENT MENTOR GROUP

Each year, we arrange for our new President-Elect to meet with a small group of MAR Past-Presidents...just to get some inside pointers. The following are some items which you may wish to cover with our new MAR President-Elect. Again, please just focus on special tips that made the job easier and more effective...rather than a “how to” manual.

1. Chairing the Executive Committee and Board of Directors meetings. Managing conduct not content of the meeting (no self-motions, using Roberts Rules, etc.).
2. Working with the Leadership Team. Real teamwork. Real continuity.
3. Selecting the “best and brightest” chairs.
4. Working with the Executive VP...and other staff. The relationship between chief elected and chief staff officer.
5. Preparation and conduct for public appearances as MAR President:
 - a) Local Association Installations or other speeches.
 - b) Media interviews – No such thing as off the record or personally-speaking
 - c) Meeting or testifying with legislators
 - d) Other
6. Using live meetings, conference calls, email.
7. The Fine Lines:
 - When to use “executive sessions”
 - Confidentiality versus Openness (legislative strategies, sensitive topics, legal issues, involving attorney-client privilege, etc.)
 - Conflict of Interest
 - Other
8. Best practices at MAR conferences and meetings
 - It’s always “show time”
 - It’s never “off the record” or “my personal opinion”
 - Acting “presidential” at all times
 - Avoid knee-jerk reaction or instant plans...fine art of active listening...
 - When it’s time to “gather more input” versus “make a decision” as leader.
9. Expectations at NAR meetings
 - Chairing Massachusetts NAR Director Caucus
 - use of the MAR suite for various purposes
 - “Hosting” MAR Receptions

- Role at the BOD meetings
 - Relating to other State and National leaders
10. Finding and using mentors
 11. Inspiring and others to volunteer and lead.
 12. What worked best...what didn't work...and special caveats.
 13. Preparing your Spouse
 - "Away" trips on behalf of MAR
 - Typical spouse "responsibilities" at the conferences
 - Balance work-family-MAR responsibilities (be successful)
 14. Other