

**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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