

Succession Planning Checklist NSBAR

Introduction: *There are two succession scenarios: A planned departure, such as NSBAR CEO retiring or accepting another job; or an unplanned departure for whatever reason. Since experience shows it can be as much as six to nine months (or longer) before a replacement CEO is on the job, it is incumbent upon the Board of Directors to act quickly and with certainty to continue the association's service to the members. For that reason, every Board of Directors needs to develop a Succession Plan and review it annually. In addition, developing and reviewing a Succession Plan is a healthy point of discussion for the Board to consider its values and resources. (11/2011)*

Section 1: Develop the Plans

____ A. NSBAR adopts a policy expressing the rationale for a Succession Plan, a commitment to make an orderly transition in the best interests of the membership.

____ B. NSBAR develops and approves a checklist of procedures. These procedures become official **policy** and should be readily available

____ C. NSBAR reviews and annually **updates** the position description for the Association Executive.

____ D. The Association Executive develops a "Turnover" Book or File, a ready reference notebook or file of succession materials in to be used in the event of unavailability caused by accident, illness or other unexpected event. Executive reviews the contents with the board, periodically reviews and updates the Book, and stores in safe where it is readily accessible.

Section 2: Checklist for Hiring an Interim Executive

This plan will be used in the event of an unplanned vacancy or until a **full-time** replacement can be found and installed.

____ A. Recently Updated Position Description

____ B. List of Qualifications Desired in an Interim Manager

____ C. The Chairman of the Board Appoints the Interim Executive with approval of the Board of Directors

____ D. Contact the CIO

____ E. Establish the Time Frame for Selection and Appointment of the Interim AE (24-48 hours? Within 30 days?)

____ F. Establish a budget for obtaining an interim AE with allocations for possible costs involved with the hiring process, salary range, benefits, legal advice, outside assistance and subsidy for initial relocation expense if required.

____ G. Contact Judith Lindenau from Traverse City Michigan extremely knowledgeable retired AE can assist.

____ H. Contact NAR's Human Resource Department

Section 3: Plan for Hiring Full-Time Replacement.

A pre-determined, well thought out replacement plan is essential to moving the AE replacement process ahead with confidence and efficiency and will minimize confusion and conflict.

____A. Identify who will conduct the search and make a recommendation to the Board of Directors. This might be the Board of Directors or Executive Committee, but it could also be a special committee. If a Search Committee,

___ Who will be members (specify leadership position or membership group to be represented).

___ Who will recommend or appoint/approve any at-large members beyond those identified by position?

___ What is the minimum/maximum number to be appointed.

___ What is the operating budget for this committee? (see next section)

___ Identify a time line by which the committee is expected to make its recommendation.

____B. Identify a budget for conducting the search.

___ Will you use a professional search firm? What will be the approximate cost, including consultant fees and travel?

___ Will you pay expenses for candidate interviews either at NAR meetings or on site, or both?

___ Overhead expense (staff support, communications, candidate travel arrangements and on and off-site meeting logistics, legal counsel assistance in the event of contracts, etc.)

____C. Establish a projected total allowable dollar value you will be willing to pay for salary/benefits/perks for a new executive. While you will want to refine and update this when the actual vacancy occurs, the projection will be useful in determining how to conduct the search.

___ Identify the process that will be employed for determining the salary/benefit package, e.g. local salary surveys, ASAE, NAR, outside HR consultant.

____D. Establish the process.

___ Who conducts the search?

___ Who authorizes expenses for the search?

___ Who gives final approval to the candidate?

___ Who is authorized to complete salary/benefits negotiations with the selected candidate?

___ What is the role of staff for operational support (making travel arrangements, minutes, correspondence with candidates, preparation of information packets on the association for the final candidates? **What staff position will be the candidates' point of contact?)**

___ What is the role of staff in giving input for candidate requirements?

Keep the following items in one easily accessible place:

- _____ A. Governing documents for the association and any subsidiaries (MLS, foundation ,etc)
- _____ B. NAR Bylaws and MLS rules most current review letter
- _____ C. IRS Letter of determination (if appropriate)
- _____ D. Employer Identification Number
- _____ E. Past and current 990s or tax returns
- _____ F. Sales tax numbers or exemption certificates
- _____ G. A listing of financial institutions; instructions for changing check-signing authority
- _____ H. Notification list (who should be notified in the event of a departure of the CEO- bans, state association, NAR, association attorney, CPA, media
- _____ I. Fill-in-the-blanks press release announcing the management change and list of media contacts (in Rapattoni/Misc Database/NEWSREL
- _____ J. List of locations of important files; blank checks; bank records & statements; program files, lockboxes and membership records
- _____ K. List of key holders for the association office
- _____ L. Record of passwords for secured sites (online banking, etc.)
- _____ M. Staff Organizational Chart. Include the current chart and what one might look like should the AE leave
- _____ N. Twelve Month Association Events Calendar
 - _____ Dues Collection and Remittance dates
 - _____ Convention and meeting dates for local, state, national
 - _____ Personnel reviews and salary adjustments
 - _____ Lease and maintenance agreement renewals
 - _____ Budget Preparation and Approval Dates
 - _____ Annual Meeting Date

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President & Chief Executive Officer

Basic Function:

Serves as the Chief Paid Executive Officer of the organization and the only staff member selected by the Board of Directors. The CEO serves as a non-voting member of the Executive Committee. Responsible to the Board of Directors for the effective conduct of the affairs of the Board. Recommends and participates in formulation of the Board mission, goals, objectives and related policies. Within that framework, the President and CEO plans, organizes, coordinates and directs the staff, programs and activities of the Board.

It is the duty of the President & Chief Executive Officer to:

1. Serves as an officer of the corporation as President and is a non-voting member of the Executive Committee.
2. Report to the Chairman of the Board of the North Shore - Barrington Association of REALTORS®.
3. Oversee and direct the continuing functions of the North Shore - Barrington Association of REALTORS®. Supervise the activities of the staff, and ensure the achievement of desired objectives. Provide for the attainment of both individual and overall proficiency, and design new or modified systems, services and procedures. Establish priorities and provide for the implementation and control of applicable work functions in adherence to budgetary limitations.
4. Have full and exclusive authority to hire, compensate, and terminate Board staff within the budget approved by the Board.
5. Keep abreast of trends and events within the industry, the economy, and the North Shore - Barrington Association of REALTORS®, assess the likely impact upon the membership, and develop positive plans and objectives accordingly.
6. Maintain a competent knowledge of Real Estate relating to and legal regulations on the local, State and National level.
7. Exercise responsibility for the ongoing management of available cash resources on a joint basis with the Treasurer. Determine cash needs and liquidity requirements, provide for the maintenance of applicable cash levels in checking accounts, and invest excess funds in accordance with prescribed Board of Directors standards. coordinate expenditures and ensure adherence to established budgets.
8. Be available to meet with individual REALTORS® to assist with questions, problems, and to entertain suggestions relative to present and future services. Promote services and a positive image of the North Shore - Barrington Association of REALTORS® among the membership.

Cooperate and co-ordinate with and assist all Officers and Committee Chairpersons in the performance of their duties

Checklist for New AE's

The Association Executive

"The AE must be a person of wisdom, vision, innovation and ambition, an after dinner speaker and a night owl, but able to travel all day and make reports out at night and never fail to appear fresh and happy the next day.

The AE must be a 'man's man' (even if the AE is a woman), a model person, a Plutocrat, a Democrat, a Republican, a New-Dealer, an Old-Dealer, and a Fast Dealer, an information technology specialist, a politician, a mathematician, an economist, an airplane and auto mechanic and an authority of construction ware, codes, laws and marketing techniques along with being an Internet guru.

The AE must be competent as a steno and typist, able to write 150 words a minute or type 300 words per minute while making sure the audio/visual equipment is working, leading all discussions and keeping interest and order without rolling their eyes or in some other way disclosing how they really feel about the discussion.

The AE must be able to give their staff the attention they want and the best advice on work, children's diseases, home financing and in-law problems and be prepared to make allowances for emergencies but never look too serious or hurt when asking them why they were late, went over budget, or why their basic assignment for which they were hired wasn't done correctly the first time or even the last time. And all of this must be done in accordance with all applicable employment laws, good taste, discretion, and an understanding they won't appreciate any of it during a performance review.

The AE must attend all meetings, conventions, funerals, baptisms, weddings, visit hospitals and jails, contact and soothe the feelings of all members, prospective members and former members in the AE's territory and take time out for good-will work on their own personal time with the local and national chapters along with peer chapters around the nation and region.

The AE must keep the building clean, know the Governor, and own a vehicle that is neither larger than any member's nor smaller. Must be able to compute mileage, drift, ground speed, gas consumption per block per minute, wear and tear on tires and depreciation on the paint job. The AE's vehicle must be new enough to create respect in all who see it but old enough to avoid charges of "putting on the dog" or having a member ask why the AE is paid too much.

The AE must know about labor law, intellectual property law, tax law and criminal law, but never venture an opinion if a lawyer is around. The AE must know the law of supply and demand and how to make an expense account and voucher stick the first time it is submitted especially if it is from a member of association leadership and counter to association policy.

The AE must have unlimited endurance and be adept at frequent over-indulgence in alcoholic beverages, unhealthy banquet food, wind, and gab. The AE must be an expert talker, liar, dancer, traveler, Bridge, golf, and poker player, authority on palmistry, upcoming elections, physiology, psychology, hydraulics, hunting, pop culture, sports scores and standing, and world politics.

The AE must be plain enough to be trusted by the spouses of members but still attractive enough to be interesting to those same spouses ... in spite of all this ... be the picture of the person on the go!"

- Author Unknown

Checklist for New AE's

This checklist includes general job functions and guidelines listed in chronological order but not necessarily in priority order. Please note that the time of year, the length of time the position was previously vacant, and specific expectations communicated at hiring may significantly impact the timing and order of these functions and duties.

Week 1 on the job

___ Have a financial audit conducted before you begin employment (if feasible).

___ Review the exit interview with your predecessor (if one exists); determine if there are any checklists you can reference, passwords you should know, specific issues you should be aware of, etc. If no exit interview, determine whether your leadership believes you should contact your predecessor for information.

___ Identify and review your association's governing documents. Every association's documents are slightly different. Review [NAR's model documents](#) for an overview.

___ Review association financial documents, records, and past audits.

___ Review your MLS's rules and regulations and bylaws. Every MLS has slightly different rules. Access [NAR's MLS policy/procedures](#).

___ Address computer security issues:

- Change computer passwords.
- Do immediate back up of all files for storage (do not overwrite existing files/tapes); then back-up data daily.

___ Meet with your volunteer leadership.

- Meet with your president to review responsibilities, determine who does what, discuss expectations, identify an association spokesperson/spokespeople. For guidance on the roles and duties of association executives and association presidents refer to the [Presidential Leadership Guide](#), where you'll find sample job descriptions. (Scroll down to the Contents list and see Chapter 2.) Also, read this REALTOR AE Magazine article: [_Balanced Leadership: Staff and volunteers lead together.](#)
- Meet with your treasurer to review budget and accounts.

___ Meet with your entire staff, if applicable, to review job descriptions and responsibilities. Introduce yourself, express your leadership and management style, review your key goals, and set the tone for your relationship with them. Then meet individually with each of them. Listen to their thoughts, concerns, and ideas about the association and interoffice relations and structure.

___ Determine whether your association employs outside contractors or professionals such as accountants, lawyers, or educators, and arrange a meeting.

___ Meet with the association's accountant/bookkeeper to address the following (if there is a cost for this meeting, ensure that you have the ability and the budget to proceed with such a meeting):

- Accountant's responsibilities and fees
- Sales tax and tax deposits
- Property taxes (review)
- Tax returns (review the last one) and filing requirements
- Location of checkbook, CDs, safe deposit box, etc.

___ Identify who is authorized to sign checks and what the amount limits are; change signature cards.

___ Document all of the association's fiscal and physical assets (have leadership sign-off):

- Do you own a building?
- What equipment do you own?
- What savings accounts, investments, and bank accounts do you have?

___ Arrange a meeting with the association's legal counsel to learn the following (if there is a cost for this meeting, ensure that you have the ability and the budget to proceed with such a meeting):

- Legal counsel's responsibilities and fees
- Basic understanding of antitrust concerns for real estate – no standard commissions, boycotting
- Pending legal issues in which the association is involved

___ Locate your association's letter of incorporation; check with secretary of state or bureau of corporations to be sure corporate status is current.

___ Contact your state association:

- Introduce yourself (they may not know your association has a new AE) and have them change their records to list you as the AE.
- Ask about available resources and publications that you should be receiving from the state association.
- Ask about involvement at the state level on committees and taskforces
- Ask about the state meeting schedule so dates can be added to your association calendar
- Ask for an AE mentor from among other local association AEs in your state
- Begin a state staff contact list

___ Become familiar with the commonly used real estate- and association-related [definitions and acronyms](#)

First 2 to 4 weeks on the job

___ Understand your association's membership policies

- Dues policies (nonmember sales assessments)
- Types of membership
- Basic "Board of Choice" (secondary membership, MLS of choice, across state lines).
- Proration of dues
- National Association's Public Awareness Campaign assessment
- Membership application form

___ Understand basic MLS policy, including the common terms below. Refer to NAR's [MLS Policy Handbook](#) for definitions. Also, contact your MLS vendor and review contracts. Understand:

- who is a "Participant"
- who are "Subscribers"
- what's your MLS billing policy
- what's a "Lockbox"
- is the MLS a wholly owned subsidiary corporation or a committee of the association
- what are your MLS enforcement policies and fines ([Review MLS Policy Statements](#))

___ Know and understand NRDS – the National REALTORS Database System.

NRDS is a single database residing on the Internet to store the member and office records for the entire REALTOR organization. You'll need a password to access NRDS (call 800-868-3225 for a password) and once you're listed you'll be

automatically added to the mailing list for all association executive information and materials. The data is maintained by Points of Entry (POEs) - who are most often staff at local associations and in some cases, the state association acting for the local association. [Access the NRDS monthly news](#).

___ Review the NRDS Manual online for more about the following topics.

- [Know what a POE \(Point of Entry\) is, what your responsibility is with NRDS, and how to get to NRDS](#)
- Add yourself to NRDS as a new member (member type – staff); once you have added your member record, update the association record with your new NRDS ID
- Begin to understand the functionality and limitations of your association's own membership system or operation and how it interfaces with NRDS
- Keep NRDS helpline number and e-mail handy: 1-800-868-3225 or e-mail nrdshelp@realtors.org

___ Know and understand RPAC – the REALTORS Political Action Committee. Access a list of [frequently asked questions](#) about RPAC for an overview. (For more information call, 202/383-1072)

- [Know RPAC definitions – corporate and personal contributions, issues advocacy, and political survival funds](#)
- [Learn and adhere to required legal deadlines for processing PAC and PAF contributions and submitting them to the state association](#)
- [Learn disclaimers for dues bills and PAC/PAF solicitations](#)

___ Review and reference your association's annual calendar

- Determine if one already exists. If one does not exist, create one
- Consult with the board of directors and president as you compile the new calendar
- Be sure to include the following: membership, board, and committee meetings (check bylaws for required frequency); social events; annual installation; officer elections; state and national meetings; community service events; holiday and office closings.
- Access NAR's [REALTOR® Association Online Calendar](#) for a list of national events.

___ Contact NAR's AE and Leadership Development Department and introduce yourself.

Let NAR know you're new by sending an e-mail to Krystal Allen (kallen@realtors.org) in the AE and Leadership Development department and to Carolyn Schwaar (cschwaar@realtors.org) in the Communications Department. A simple note with your association, title, start date, and the AE your replacing is sufficient.

- [Ask about available resources and publications that you should be receiving from NAR](#) including the weekly [Internal News Service for AEs](#) e-mail and the quarterly magazine for AEs, [REALTOR Association Executive](#)
- Ask about involvement at the national level on committees and taskforces
- Ask about the NAR meeting schedule, so dates can be added to your association calendar (access NAR's [REALTOR® Association Online Calendar](#))

- Begin a national staff contact list; add AE and Leadership Development staff to your contact list -[click here for a list](#)

___ Contact neighboring associations for advice and guidance

- Introduce yourself
- Begin to develop a contact list of other association executives

___ Contact an AE mentor, as identified by your state association

1 to 3 months on the job

___ Locate and review your association's internal policies, procedures, and employee manual

- Find out if any have been written. If written policies do not exist, start writing them as you go along and be sure the items below are included. Access association internal policies from other associations at the [REALTOR Association Resources Exchange](#).
- Annual dues – bylaws
- Election of officers – bylaws
- Installation and new member induction
- REALTOR of the Year (ROTY) selection
- Human resources issues
- Harassment policy

- Consult with current and past leaders that are familiar with how things have been done
- Know what your association's policy is regarding distribution of membership rosters and e-mail addresses
- Determine whether emergency procedures are in place – unplanned staff vacancies, weather emergencies, other crisis
- Find out when employment reviews and appraisals are conducted
- Check holidays and other office closings

___ [Understand dues collection policies and procedures](#)

- Determine when dues are collected and develop schedule so invoices are sent far enough in advance to meet deadlines
- Contact your state association for dues disclosures
- Work with the state association to make sure you collect state and NAR dues and transmit them properly
- Know member and nonmember dues policies
- Collect new member dues throughout the year
- Identify procedures so you can be consistent year to year
- [Determine whether your association uses e-Commerce](#)

___ Locate and review the contracts and agreements listed below. Know the terms and renewal dates of all contracts.

- Lease agreements for office equipment; note time frames and expirations
- Rental agreement on building space
- Maintenance agreements

- Tenant contracts, if you own the building and are the property manager
- MLS and all vendor contracts
- Web site domain registrations

___ Know the association's revenue sources, such as dues, product sales, classes, or marketing alliances.

___ Locate the letter of tax determination status from the IRS. Read this REALTOR AE Magazine article: [To Profit or Not to Profit? Is the REALTOR® association tax status a help or a hurdle in today's business model?](#)

___ [Know and understand NAR's E&O insurance](#)

- Find out what E&O insurance covers and what the requirements are for maintaining coverage, including responsibilities with governing documents
- Find out what policies can affect E&O insurance— employee policies, antitrust
- Learn the procedure for filing a claim
- Add NAR Legal staff to your NAR staff contact list. [Click here](#) for a list.

___ Know and understand your responsibilities regarding bylaws and MLS rules

- Determine when your association bylaws and MLS rules were last reviewed by NAR
- Send bylaws and MLS rules to NAR for review (required annually), and whenever you make changes
- If your bylaws revision or approval date is more than a year old, contact NAR's Member Policy Department to find out if there are any changes to model bylaws that you need to incorporate. Call 312-329-8399.
- Add NAR Member Policy staff to your NAR staff contact list. [Click here](#) for a list.

___ Learn about the following aspects of your association travel policy (possible sources for information: written financial policies, bylaws, budget, treasurer, bookkeeper/accountant, office manager):

- Who is covered in the budget to travel to which state and national meetings
- What travel expenses are covered in the budget; what are the IRS travel requirements
- What are the mileage reimbursement rates
- Is there a policy about sharing hotel rooms
- Does the president get a credit card
- Is there a travel expense form

___ Talk to leadership to clarify and identify who makes travel reservations and what travel events the AE is responsible for planning and organizing

___ Identify means of communicating with members and leadership

- List the vehicles of communication – Web site, newsletter, message board, e-mail, snail mail, listserv, fax
- Be sure members are kept apprised (in several ways) of what is going on at your association. Read this REALTOR AE Magazine article: [What Have You Done For Me Lately? Six Places to Market the Value of Membership.](#)
- Market classes, meetings, and special events

___ Review the [Code of Ethics](#) and review NAR's [Code of Ethics and Arbitration Manual](#)

___ Know the new member orientation requirements, which must include Code of Ethics training

- How often are orientations scheduled and when was the last one
- Is there a program agenda in place
- Does it meet NAR requirements – antitrust, fair housing, and ethics
- Who teaches the orientation – assign speakers or instructors
- When and how many times a year is your orientation required – review the bylaws
- What AV equipment is needed to deliver orientation materials

___ Know how to prepare for and coordinate committee meetings. Read this article from a fellow AE on [Managing Meetings](#).

- Read past agendas and minutes
- Identify which committees need to meet
- Know how and who sets meetings, creates agenda, and prepares minutes
- Communicate with committee chairs and the president to implement goals; determine whether goals are stated in the strategic plan

___ Know how to schedule and coordinate events

- Know what events are on the association's annual calendar
- Review the budget for events
- Plan ahead to reserve dates and space for each event
- Reference past plans, so you don't reinvent the wheel
- Talk to past volunteers to identify protocol and traditions
- Understand basics of meeting planning and management ([event planning checklist](#))

___ Identify Web sites and other online resources you should reference

- Local association Web site
- State association Web site
- [NAR's REALTOR.org \(with AE Center\)](#)
- NAR's Road Map for New REALTOR® Association Chief Staff Executives at REALTOR.org
- [Internet Crusade \(e-Pro\)](#)
- [AE online programs from Internet Crusade](#)
- Your MLS vendor site

Six months on the job

___ Become familiar with [professional standards procedures and policies](#).

- Determine if the association currently has a certified professional standards administrator; if it is you, determine when and how you will receive mandatory training (state, regional, or NAR training) - [Access NAR's Professional Standards Procedures - Training Materials](#)
- [Learn the cooperative agreement requirements from NAR](#)

___ Develop or update financial policies; review the association's system of checks and balances. Read this REALTOR AE Magazine article: [_Better Budgets: 10 steps to initiating a zero-based program budget](#)

___ Assess the association's minimum IT requirements (software and hardware) and office equipment needs. Read this REALTOR AE Magazine article: [_10 Ways to Save On Technology](#).

- Determine whether equipment is leased or owned; identify pros and cons of each option
- Conduct needs assessment for replacement/addition needs
- Prepare, as needed, a capital budget request plan

___ Identify NAR resources for HR and employment laws at the state and federal levels. Read this REALTOR AE Magazine article: [How to Hire the Best -- where to look, what to look for, what to ask](#)

___ Locate and review your association's insurance plans

- D&O
- E&O
- Workmen's comp
- Business policy
- Indemnification clause for D&O
- Indemnification for building
- Bonding

___ [Learn and understand the three-way agreement](#) between the local, state, and national REALTOR organizations. [Click here](#) to access the agreement.

___ Learn services available through the state and national associations

___ Learn what types of product and service discounts you and your members can receive through [NAR's REALTOR Benefits® Program](#).

___ Learn what education resources are available to you and your members – professional designations, publications, Web sites, technology hotline. Visit Realtor.org's [Education Page](#) for an overview.

___ [Liability issues – antitrust, fair housing, legal hotline, E&O insurance policy, legal action committee, MLS \(REALTOR requirement, nonmember MLS\)](#). Read this REALTOR AE Magazine article: [_Responsibilities and protections for your association and its volunteers under the law](#)

___ Know and understand legislative issues; determine your associations role in the local legislative and political arena

___ [Review or develop an RPAC fundraising plan](#) . Read this REALTOR AE Magazine article: [Fresh RPAC Tips for Political Fundraising](#)

___ If you are also the acting Government Affairs Director for your organization, please contact NAR's GAD Representative, Gerry Allen, 202/383-1119, and join the [GADs Listserv](#).

___ Request a copy of the Government Affairs CD – an educational tool that provides an overview of the programs and services offered by NAR's Government Affairs Division.

___ Register in the [NARactioncenter](#). The [NARactioncenter](#) is a grassroots online communications system which allows REALTORS® to stay informed about NAR's lobbying agenda and be involved in public policy issues critical to the real estate industry. The [NARactioncenter](#) enables NAR to communicate with REALTORS® and advocate critical issues before Members of Congress and the Administration.

___ Subscribe to [Legislative/Regulatory Issues Update \(Listserv\)](#)

1 year on the job

___ Know and understand basic real estate practices. To learn the business of your members, start reading the NAR member magazine, REALTOR Magazine, regularly and search the following topics at [REALTOR Magazine Online](#).

- Different types of listings
- Business relationship between broker/agent
- Independent contractor
- Personal assistants
- Business climate
- Consolidations and mergers
- Agency relationships
- Financing (Fannie Mae, etc.)
- Risk management
- MLS issues (including IDX, VOWs, REALTOR.com)
- Technology tools (PDA, wireless MLS, etc.)
- Data security issues
- Member personal safety and security
- Real estate terminology

___ Know your professional development opportunities. Enroll in NAR's REALTORS® Association Management Self-Study Courses to help you increase their awareness and understanding of REALTOR association management. This course is only available online. Students review or download the questions and submit their answer electronically; thus receiving instant results. [Click here](#) for more information on AE Education.

- Attend state and national meetings, including the annual [AE Institute](#)
- Basic computer training
- REALTOR Certified Association Executive (RCE) designation. [Click Here](#).
- Spokesperson training

- Parliamentary procedures
- Check on scholarships available from state association and NAR
- NAR's REALTOR Association Management [Self-Study Course](#)
- [e-Pro Course](#)
- RPAC Fundraising Seminar

___ Develop relationships with volunteer leaders

- Conduct a preference checklist with president-elect
- Develop a strategic planning process involving volunteer leaders. Read this REALTOR AE Magazine article: [Business or Strategic, What's the Plan?](#)
- Resources directed to short- and long-term planning
- Understand proper roles of staff versus volunteer leadership
- Recognize models for associations – specifically, the [REALTOR Association Models Online Planning Tool](#) available from NAR.
- Understand political dynamics and relationships between current and former leadership

___ Know your role in NAR's [Organizational Standards for Associations](#) (certification materials are automatically transmitted electronically to local associations from NAR)

To print this list, Click on the **PRINT FORMAT** button below.

GUIDE CONTENTS:

[New AE Guide Home Page](#)

[Checklist for New Chief Staff Executives](#)

[Advice From Your Peers](#)

[Important Definitions and Acronyms](#)

[Essential NAR Policies and Procedures](#)

[Get to Know the NAR Staff](#)

[References and Resources](#)

[What Is NAR?](#)

[How to Get Involved in NAR Committees](#)

[Enhance Your Career With AE Education](#)

[Association Human Resources and Staffing](#)

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http://www.realtor.org/association_executives/ae_subcommittees/aechecklist

___ **D. The Association Executive develops a “Turnover” Book or File, a ready reference notebook or file of succession materials in to be used in the event of unavailability caused by accident, illness or other unexpected event.**

Executive reviews the contents with the board, periodically reviews and updates the Book, and stores in safe where it is readily accessible.

Go to terese (terry) Penza/my documents/Terry/Manual-agreements

Go to terese (terry) Penza/my documents/duediligence

Go to terese (terry) Penza/my documents/FileKeepForever

Go to terese (terry) Penza/my documents/ Insurance info

Go to terese (terry) Penza/my documents/Logo

Go to terese (terry) Penza/my documents/treasury department info

For history go to terese (terry) Penza/my documents/

Barringtonmerger

BOD_minutes

Declaration of condo ownership

Historical

historicaldonotdelete