

## **PRESIDENT POSITION DESCRIPTION & CHECKLIST**

**FUNCTION:** Serve as executive elected officer representing the entire association membership and its best interests.

**DUTIES & RESPONSIBILITIES:** Within the limits of the AAR Bylaws, Policies and Official Statements, the President is responsible for and has commensurate authority to:

- Act as AAR's authorized spokesperson. Represent the association in contact with the public, government entities, the members, all other REALTOR® associations, allied organizations and the media.
- Ensure, in coordination with the Chief Executive Officer, that policies and programs which will further the goals and objectives of the association are planned, formulated and presented to the Executive Committee and the Board of Directors.
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements to assure operations are within budget.
- Act as signer on designated accounts (Checking, Strategic Initiatives, Capital Purchase, Operating Reserve, PSF, RMA, etc.)
- Approve association contracts and official documents, if necessary. (Policy B.7)
- Serve as ex-officio member of AAR primary committees pursuant to the Robert's Rules of Order (*The chairs of the primary committees were appointed by you during your year as First Vice President*).
- Issue Calls For Action when necessary. (Policy E.3)
- Serve as official host of the association at its social events.
- Visit local associations and attend association installations, major investor events or other conferences to support partnering efforts (Communicate with the CEO regarding anticipated visits).
- Supervise and coordinate the activities of the CEO in accordance with the CEO's job description.
- Supervise and assign activities of the elected officers of the association in accordance with their job descriptions.
- Perform those duties as directed by the Board of Directors and the Executive Committee.
- Serve as a member of the Arizona Homeownership Alliance. (AAR Bylaws, Article IV, Section 5)
- Serve as a director of the Arizona REALTOR® Disaster Assistance Foundation
- During term as immediate past-president, serve as ex-officio voting director of the Arizona REALTORS® Foundation for Housing and Community Outreach.

## **PRIOR TO TAKING OFFICE (As President-elect)**

- December** - Select a facilitator for April Planning Session
- April** - Lead the Planning Session.
- April** - Finalize Strategic Plan
- April** - Begin thinking about non-member AAR Director. Either an individual or someone from a group/entity with which you feel AAR should develop a working partnership/relationship.
- May** - Begin coordination of Operations business plan and budget development.
- May** - Attend NAR Midyear Meetings in Washington, D.C. - attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).  
Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region 11 Caucus meetings
  - NAR Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given
- May** - Begin working with AAR's VP of Professional & Business Development on details for AAR's Leadership Conference/Inaugural in November. Decision on whether or not to form a workgroup to plan the conference or use leadership/staff.
- June** - Coordinate with Treasurer-elect and CEO on development of proposed Operating/Capital budget.
- July** - Identify non-member Director for BOD (not always filled every year)
- July** - Choose Executive Committee meeting dates
- August** - Attend NAR Leadership Conference in Chicago, Illinois.
- August** - Chair Executive Committee Orientation and Budget meeting
- August** - Coordinate with AAR's Controller to complete signature cards to be a signer on designated financial accounts.
- August** - In preparation of Inaugural Dinner, give CEO names of: Installing MC, Installing Officer, Person giving inspirational message, person leading pledge of allegiance, Special guests, gifts for MC and Installing Officer.
- September** - Attend Arizona REALTOR® Caucus
- September** - Coordinate with AAR's Director of Operations to obtain photo, if needed.
- October** - Work with CEO on "Welcome" email for incoming state directors
- October** - AAR BOD considers proposed Operating/Capital Budget. The incoming President and Treasurer are responsible for presenting budget.
- November** - give CEO names of selected primary committee chairs and AE representative during your year as President.

## **DECEMBER**

### **DUTIES**

- Term officially begins on the 1<sup>st</sup>
- Finalize selected primary committee chairs and AE representative during your year as President.
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Work with the CEO to prepare agenda for the first Executive Committee meeting in January
- Invite Region XI Vice President to attend AAR's Convention and Leadership Conference
- Communicate with Region XI Vice President on possible goals for the Region
- Send names, email addresses and committee assignments to the Region XI Vice President, if applicable, of AAR's CEO, state leadership, national directors, NAR chairs and vice chairs
- Ensure that the Region XI Vice President is on the email distribution list for AAR's publications and electronic communications

## **JANUARY**

### **DUTIES**

- Begin planning the Arizona REALTOR® Convention with the Professional and Business Development committee
- Attend REALTOR® Day at the Capitol
- Serve as Chair of the Executive Committee Meeting
- Attend Spokesperson Training (Leadership Team)
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Work with the CEO to prepare for the Executive Committee and Board of Directors meeting in March
- Work with CEO to prepare agendas for March ExCom and BOD meetings

## **FEBRUARY**

### **DUTIES**

- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Attend the Professional Standards Workshop, and do welcome and introductions
- Select members to do the Pledge of Allegiance and Inspirational message at the March Board of Directors meeting
- Book your flight for Region XI Conference (AAR will handle your registration/hotel accommodations)

## MARCH

### DUTIES

- Attend the Arizona REALTOR® Convention
- Serve as Chair of the Executive Committee Meeting
- Serve as Chair of the Board of Directors Meeting
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Submit a President's Report for the Region XI Caucus – CEO drafts report for your review and revisions, then submits report to Region XI VP.
- Book your flight for NAR Legislative Meetings (AAR will handle your registration/hotel accommodations)

## APRIL

### DUTIES

- Attend the AAR Planning Session
- Attend the Region XI Leadership Conference
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region XI) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## MAY

### DUTIES

- NAR Mid-Year Legislative - attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - o NAR 360
  - o General Session
  - o Arizona Caucus - Facilitate caucus
  - o Region 11 Caucus meetings – give Arizona update
  - o NAR Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

- Begin thinking about your selections for the Vision and Distinguished Service Awards to be given during the Leadership Dinner in October. Recipient names are due to the CEO in August.

## JUNE

### DUTIES

- Serve as Chair of the Executive Committee Meeting
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## JULY

### DUTIES

- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## AUGUST

### DUTIES

- Attend Executive Committee Budget Meeting
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Prepare an annual expectations list and written performance review of the Chief Executive Officer (Review occurs during line officer meeting prior to the budget meeting).
- Send Vision and Distinguished Service Award recipient names to the CEO

## SEPTEMBER

### DUTIES

- Attend the Arizona REALTOR® Caucus
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Book your flight for NAR REALTORS® Conference & Expo (AAR will handle your registration/hotel accommodations)
- Select members to do the Pledge of Allegiance and Inspirational message at the October Board of Directors meeting

## OCTOBER

### DUTIES

- Attend the AAR Leadership Conference
- Serve as Chair of the Executive Committee Meeting
- Serve as Chair of the Board of Directors Meeting

- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Submit a President's Report for the Region XI Caucus – CEO Drafts report for your review and revisions, then submits report to Region XI VP.

## **NOVEMBER**

### **DUTIES**

- Attend the NAR REALTORS® Conference & Expo
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are **required** to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus - facilitate caucus
  - Region XI Caucus meeting - give Arizona update.
  - NAR Board of Directors meeting. (On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.)
- Monitor, in conjunction with the Treasurer and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## **PRESIDENT-ELECT POSITION DESCRIPTION & CHECKLIST**

**FUNCTION:** In the event of the absence or disability of the President, performs duties of the President. Work closely with the other officers and the Chief Executive Officer for orientation and planning purposes to ensure a smooth transition into the presidency.

**DUTIES AND RESPONSIBILITIES:** Within the limits of the Bylaws and Policies, the President-elect is responsible for and has commensurate authority to:

- Serve as Vice Chair of the Board of Directors and the Executive Committee. (AAR Bylaws, Article VI, Section 6).
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - Arizona Caucus
  - Both Region 11 Caucus meetings (the two Caucus meetings are held the day before the Board of Directors meeting).
  - Board of Directors Meetings. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.
- Serve as an appointed member of the NAR State Leadership Summit.
- Attend AAR's Executive Committee Meetings, Spring Conference, Planning Session, REALTOR® Caucus and Leadership Conference.
- Plan and conduct AAR Planning Session in conjunction with Chief Executive Officer to plan programs and activities appropriate for the upcoming year in concert with the strategic plan.
- Visit local associations and attend association installations or other conferences to support partnering efforts as assigned by the President.
  - Communicate with Chief Executive Officer regarding anticipated visits.
- Work in concert with the President and the Chief Executive Officer in carrying out the programs and activities of the association.
- Recommend primary committee vice chairs and one local executive officer to the President.
  - The primary committees vice chairs were appointed by you during your year as First Vice President.
- Represent AAR at other associations or organizations as assigned by the President.
- Perform other duties as assigned by the President.
- Serve as President of the Arizona REALTORS® Disaster Assistance Foundation.
- Serve as association President if the President is incapacitated.

## **DECEMBER**

### **DUTIES**

- Term officially begins on the 1<sup>st</sup>
- Finalize selected primary committee chairs and AE representative to serve during your year as President.
- Select/Finalize a facilitator for April Planning Session
- Review association's monthly financial statements in ShareFile Folder

## **JANUARY**

### **DUTIES**

- Attend REALTOR® Day at the Capitol
- Serve as Vice Chair during the Executive Committee Meeting
- Attend Spokesperson Training (Leadership Team)
- Review association's monthly financial statements in ShareFile Folder

## **FEBRUARY**

### **DUTIES**

- Review association's monthly financial statements in ShareFile Folder
- Book your flight for Region XI Conference (AAR will handle your registration/hotel accommodations)
- Work with the CEO on a plan for the AAR Planning Session

## **MARCH**

### **DUTIES**

- Attend the Arizona REALTOR® Convention
- Serve as Vice Chair during the Executive Committee Meeting
- Serve as Vice Chair during the Board of Directors Meeting
- Review association's monthly financial statements in ShareFile Folder
- Submit a President's Report for the Region XI Caucus – CEO drafts report for your review and revisions, then submits report to Region XI VP.
- Book your flight for May NAR Legislative Meetings in Washington, D.C. (AAR will handle your registration/hotel accommodations)



## APRIL

### DUTIES

- Lead the AAR Planning Session
- Attend the Region XI Leadership Conference
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region XI) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).
- Finalize Strategic Plan
- Review association's monthly financial statements in ShareFile Folder
- Begin thinking about non-member AAR Director. Either an individual or someone from a group/entity with which you feel AAR should develop a working partnership/relationship.

## MAY

### DUTIES

- Attend NAR Legislative Meetings - attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region 11 Caucus meetings
  - NAR Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given
- Review association's monthly financial statements in ShareFile Folder
- Begin coordination of Operations business plan and budget development with CEO and Treasurer-elect
- Begin working with AAR's VP of Professional & Business Development on details for AAR's Leadership Conference/Inaugural in November. Decision on whether or not to form a workgroup to plan the conference or use leadership/staff.

## JUNE

### DUTIES

- Serve as Vice Chair during the Executive Committee Meeting
- Review association's monthly financial statements in ShareFile Folder
- Coordinate with Treasurer-elect and CEO on development of proposed Operating/Capital budget
- Book your flight for August NAR Leadership Conference in Chicago (AAR will handle your registration/hotel accommodations)

## JULY

### DUTIES

- Review association's monthly financial statements in ShareFile Folder
- Identify non-member Director for BOD (not always filled every year)
- Choose Executive Committee meeting dates

## AUGUST

### DUTIES

- Chair Executive Committee Orientation and Budget Meeting
- Attend NAR Leadership Conference in Chicago, Illinois
- Review association's monthly financial statements in ShareFile Folder
- Coordinate with AAR's Controller to complete signature cards to be a signer on designated financial accounts during your year as President.
- In preparation of Inaugural Dinner, give CEO names of: Installing MC, Installing Officer, Person giving inspirational message, person leading pledge of allegiance, Special guests, gifts for MC and Installing Officer.

## SEPTEMBER

### DUTIES

- Attend the Arizona REALTOR® Caucus
- Review association's monthly financial statements in ShareFile Folder
- Book your flight for November NAR REALTORS® Conference & Expo (AAR will handle your registration/hotel accommodations)
- Coordinate with AAR's Director of Operations to obtain photo, if needed

## OCTOBER

### DUTIES

- Attend the AAR Leadership Conference
- Serve as Vice Chair during the Executive Committee Meeting
- Serve as Vice Chair during the Board of Directors Meeting and present budget with Treasurer-elect
- Review association's monthly financial statements in ShareFile Folder
- Work with CEO on "Welcome" email for incoming Board of Directors
- Along with Treasurer-elect, present proposed Operating/Capital Budget to AAR BOD for Approval

## NOVEMBER

### DUTIES

- Attend the NAR REALTORS® Conference & Expo
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).  
Directors are **required** to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region XI Caucus meeting
  - NAR Board of Directors meeting. (On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.)
- Give CEO names of selected primary committee chairs and AE representative to serve during your presidency.
- Review association's monthly financial statements in ShareFile Folder

## **FIRST VICE PRESIDENT POSITION DESCRIPTION & CHECKLIST**

**FUNCTION:** Serve as a member of the elected officers' management team and assists the President and President-elect in carrying out the functions of their offices. In the absence of both the President and the President-elect, assumes duties and responsibilities of the President.

**DUTIES AND RESPONSIBILITIES:** Within the limits of the Bylaws and Policies, the First Vice President is responsible for and has commensurate authority for the following:

- Serve as a member of the AAR Board of Directors and the Executive Committee. (AAR Bylaws, Article VI, Section 6).
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and Rocky Mountain Region (Region 11) as a national director. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - Arizona Caucus
  - Both Region 11 Caucus meetings (the two Caucus meetings are held the day before the Board of Directors meeting).
  - Board of Directors Meetings. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.
- Attend AAR's Executive Committee Meetings, Spring Conference, Planning Session, REALTOR® Caucus and Leadership Conference.
- Visit local associations and attend association installations or other conferences to support partnering efforts as assigned by the President.
  - Communicate with Chief Executive Officer regarding anticipated visits.
- Work in concert with the President, President-elect, and the Chief Executive Officer in carrying out the programs and activities of the association.
- Recommend primary committee vice chairs to the Executive Committee.
  - It is anticipated that these recommendations will be primary committee chairs during your Presidency.
- Represent AAR at other associations or organizations as assigned by the President.
- Oversee AAR programs and activities as assigned in the officers' assignments by the President.
- Assist the President-elect in planning programs and activities appropriate for the upcoming year, in concert with the strategic plan and in coordination with the primary committee leadership and the Chief Executive Officer.
- Perform other duties as assigned by the President.
- Serve as Vice President of the Arizona REALTORS® Disaster Assistance Foundation.
- Serve as ex-officio voting director of the Arizona REALTOR® Foundation for Housing and Community Outreach.

- Responsible for the coordination of the efforts and activities of the Regional Vice Presidents. (AAR Bylaws, Article V, Section 3).
- Serve as President-elect if President-elect is incapacitated.

## **DECEMBER**

### **DUTIES**

- Term officially begins on the 1<sup>st</sup>
- Review association's monthly financial statements in ShareFile Folder
- Finalize selected primary committee vice chairs to serve during your year as President-elect (It is anticipated that these recommendations will be primary committee chairs during your presidency).

## **JANUARY**

### **DUTIES**

- Attend REALTOR® Day at the Capitol
- Attend the Executive Committee Meeting
- Attend Spokesperson Training (Leadership Team)
- Submit application for AAR President-elect, if you are seeking the position
- Review association's monthly financial statements in ShareFile Folder

## **FEBRUARY**

### **DUTIES**

- Review association's monthly financial statements in ShareFile Folder
- Book your flight for Region XI Conference (AAR will handle your registration/hotel accommodations)

## **MARCH**

### **DUTIES**

- Attend the Arizona REALTOR® Convention
- Attend the Executive Committee Meeting
- Attend the Board of Directors Meeting
- Review association's monthly financial statements in ShareFile Folder
- Book your flight for May NAR Legislative Meetings in Washington, D.C. (AAR will handle your registration/hotel accommodations)

## APRIL

### DUTIES

- Attend the AAR Planning Session
- Attend the Region XI Leadership Conference
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region XI) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).
- Review association's monthly financial statements in ShareFile Folder

## MAY

### DUTIES

- Attend NAR Legislative Meetings - attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region 11 Caucus meetings
  - NAR Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given
- Review association's monthly financial statements in ShareFile Folder

## JUNE

### DUTIES

- Attend** the Executive Committee Meeting
- Review association's monthly financial statements in ShareFile Folder

## JULY

### DUTIES

- Review association's monthly financial statements in ShareFile Folder

## AUGUST

### DUTIES

- Attend the Executive Committee Orientation and Budget Meeting
- Review association's monthly financial statements in ShareFile Folder

## SEPTEMBER

### DUTIES

- Attend the Arizona REALTOR® Caucus
- Review association's monthly financial statements in ShareFile Folder
- Book your flight for November NAR REALTORS® Conference & Expo (AAR will handle your registration/hotel accommodations)

## OCTOBER

### DUTIES

- Attend the AAR Leadership Conference
- Attend the Executive Committee Meeting
- Attend the Board of Directors Meeting
- Review association's monthly financial statements in ShareFile Folder

## NOVEMBER

### DUTIES

- Attend the NAR REALTORS® Conference & Expo
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are **required** to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region XI Caucus meeting
  - NAR Board of Directors meeting. (On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.)
- Review association's monthly financial statements in ShareFile Folder

## **TREASURER POSITION DESCRIPTION & CHECKLIST**

**FUNCTION:** Makes recommendations concerning financial matters, general operations, and policies and reports to the Executive Committee and Board of Directors on those matters and financial status of the association.

**DUTIES AND RESPONSIBILITIES:** Within the limits of the Bylaws and Policies, the Treasurer is responsible for and has commensurate authority:

- Serve as Chair of the annual budget session in the year you are elected.
  - Meet with President and Chief Executive Officer in June prior to taking office.
- Review and recommend the annual budget to the Executive Committee and Board of Directors in the year you are elected.
  - August - Executive Committee budget meeting prior to taking office.
  - October - Board of Directors meeting prior to taking office.
- Serve as a member of the Board of Directors and the Executive Committee and provide financial reports at each meeting. (AAR Bylaws Article VI, Section 6).
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and Rocky Mountain Region (Region 11) as a national director, voting delegate. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - NAR 360
  - Arizona Caucus
  - Both Region 11 Caucus meetings (each Caucus is held the day before the Board of Directors meeting).
  - Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.
- Attend AAR's Executive Committee Meetings, Arizona REALTOR® Convention, Planning Session, REALTOR® Caucus and AAR Leadership Conference.
- Monitor, in conjunction with the President and Chief Executive Officer, association monthly financial statements.
  - The Executive Committee serves as the AAR Finance Committee. (Policy B.2).
  - AAR financials will be provided for review on a monthly basis.
- Serve as a liaison between the Executive Committee and Chief Executive Officer on matters of general operations, facilities, member group purchase programs, and Bylaws and Policies.
- Ensure, in conjunction with the President and Chief Executive Officer, that AAR funds are invested pursuant to AAR policy. (Policy B.6).
- Perform other duties as outlined in the policies and procedures or as assigned by the President.
- Serve as a director of the Arizona REALTORS® Disaster Assistance Foundation
  - Serve as a signer on ARDAF account.



### **PRIOR TO TAKING OFFICE (As Treasurer-elect)**

- April** - Participate in the Planning Session.
- May** - Begin coordination of Operations business plan and budget development with CEO and President-elect
- June** - Coordinate with President-elect and CEO on development of proposed Operating/Capital budget.
- August** - Attend Executive Committee Orientation
- August** - Serve as Vice Chair of the Budget Meeting and present the budget to the Executive Committee
- October** - Present budget to the AAR BOD
- November** - begin term as Director of the Arizona REALTORS Disaster Assistance Foundation (ARDAF)

### **DECEMBER**

#### **DUTIES**

- Term officially begins on the 1<sup>st</sup>
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

### **JANUARY**

#### **DUTIES**

- Attend REALTOR® Day at the Capitol
- Attend the Executive Committee Meeting and give the year-to-date financial report
- Attend Spokesperson Training (Leadership Team)
- Submit application for AAR First Vice President, if you are seeking the position
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

### **FEBRUARY**

#### **DUTIES**

- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Meet with CEO, Controller and audit firm to review the audit.
- Book your flight for Region XI Conference (AAR will handle your registration/hotel accommodations)

### **MARCH**

#### **DUTIES**

- Attend the Arizona REALTOR® Convention
- Attend the Executive Committee Meeting and give the audit report and year-to-date financial report
- Attend the Board of Directors Meeting and give the year-to-date financial report
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

- Book your flight for May NAR Legislative Meetings in Washington, D.C. (AAR will handle your registration/hotel accommodations)

## **APRIL**

### **DUTIES**

- Attend the AAR Planning Session
- Attend the Region XI Leadership Conference
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region XI) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2).
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## **MAY**

### **DUTIES**

- Attend NAR Legislative Meetings - attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - o NAR 360
  - o General Session
  - o Arizona Caucus
  - o Region 11 Caucus meetings
  - o NAR Board of Directors Meeting. On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## **JUNE**

### **DUTIES**

- Attend the Executive Committee Meeting and give the year-to-date financial report
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Coordinate with President-elect and CEO on development of proposed Operating/Capital budget

## **JULY**

### **DUTIES**

- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## **AUGUST**

## DUTIES

- Attend the Executive Committee Orientation and Budget Meeting
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## SEPTEMBER

### DUTIES

- Attend the Arizona REALTOR® Caucus
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget
- Book your flight for November NAR REALTORS® Conference & Expo (AAR will handle your registration/hotel accommodations)

## OCTOBER

### DUTIES

- Attend the AAR Leadership Conference
- Attend the Executive Committee Meeting and give the year-to-date financial report
- Attend the Board of Directors Meeting and give the year-to-date financial report
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget

## NOVEMBER

### DUTIES

- Attend the NAR REALTORS® Conference & Expo
- Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® and the Rocky Mountain Region (Region 11) as a national director, voting delegate, and as a member of the state association leadership forum. (AAR Bylaws, Article VII, Section 2). Directors are **required** to attend the following meetings, at a minimum:
  - NAR 360
  - General Session
  - Arizona Caucus
  - Region XI Caucus meeting
  - NAR Board of Directors meeting. (On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.)
- Monitor, in conjunction with the President and the Chief Executive Officer, association monthly financial statements in ShareFile Folder to assure operations are within budget



## **Association Executive Liaison**

### Position Description - Updated October 2016

#### **FUNCTION**

They serve as liaisons between the local Association Executives and the Executive Committee and the Board of Directors.

#### **DUTIES AND RESPONSIBILITIES**

Within the limits of Bylaws and Policies, the Association Executive Liaison is responsible for and has commensurate authority:

1. To serve as an AE representative on the AAR Executive Committee providing leadership to both AAR and local AE's and identifying effective approaches to address current Association Executive issues, as required, such as AE Workshop plans/agenda. (AAR Bylaws, Article VI, Section 6)
2. Attend AAR's official meetings (Spring Convention, Planning Session, REALTOR® Caucus, Leadership Conference).
3. To contact the local AE's every 60 days at a minimum. The purpose is to remind the local AE's that the AE liaison is available to assist and to identify level of assistance required by specific local association. *First contact to cover role of AE Liaison and ascertain AE needs.*
4. To prepare brief written report to send to AAR's CEO following contact with local AE's.
5. To assist the AAR Director of Association Relations with planning and facilitating the annual AE Workshop.
6. The AE Liaison will facilitate a minimum of two (2) region meetings each year; one at AAR's Spring Conference and one at AAR's Leadership Conference
7. To identify, with the AAR line officers, topics/information that the AE Liaison should "push communicate" with local AE's.
8. To perform other duties as outlined in the policies and procedures or as assigned by the President.



## Regional Vice Presidents

### Position Description - Updated October 2016

#### **FUNCTION**

Serve as liaisons between the boards/associations of respective regions, the Executive Committee and the Board of Directors.

#### **DUTIES AND RESPONSIBILITIES**

Within the limits of the Bylaws and Policies, the Regional Vice President is responsible for and has commensurate authority:

1. Serve as a regional representative on the AAR Executive Committee providing leadership to both AAR, individual associations within the region, and identifying effective approaches to address current regional issues, as required. (AAR Bylaws, Article VI, Section 6)
2. Contact the assigned local association Presidents every 60 days, at a minimum. The purpose is to remind the local Presidents that the RVP is available to assist and identify the level of assistance required by specific local associations. At first contact cover the role of RVP and ascertain local needs.
3. Prepare brief written reports to send to AAR's CEO following contact with local associations.
4. Attend AAR's Executive Committee Meetings, Spring Conference, Planning Session, REALTOR® Caucus and Leadership Conference.
5. Facilitate a minimum of two (2) region meetings each year; one at AAR's Spring Conference and one at AAR's Leadership Conference. Facilitate the Regional Caucuses.
6. Identify, with the AAR line officers, topics/information that the RVP should "push communicate" with assigned locals.
7. Conduct local association officer installations where needed and communicate with the Chief Executive Officer regarding anticipated installations.
8. Identify and select successor RVP(s) no later than eleven (11) months prior to the RVP officially taking office to work with current RVP for training and assist in serving the region.
9. Assist the local association RAPAC chairs with fundraising awareness efforts.
10. Perform other duties as outlined in the policies and procedures or as assigned by the President.
11. Serve as a board member of the Arizona REALTOR® Foundation for Housing and Community Outreach.
12. Assist with local association NAR Core Standards compliance as requested by AAR staff.

## Regional Vice President Elections/AAR Bylaws

### Article V

**Section 6.** If a vacancy occurs during the term of office of the President, the President-elect shall assume the office of the President for the remainder of the unexpired term and serve as President for a full term for the next elective year. The President shall not be eligible to serve a successive complete term unless the person assumed the office of President due to a vacancy of office. If a vacancy occurs in the office of President-elect, the First Vice President shall assume the office of the President-elect for the remainder of the unexpired term and must stand for election for President-elect to succeed to the office of President. If a vacancy occurs in the office of First Vice President, Treasurer or Executive Committee member, the President, with the approval of the Executive Committee, shall appoint a replacement for the duration of the unexpired term. Should a vacancy occur in an RVP position, that Region shall appoint a replacement for the duration of the unexpired term. Should the office of Immediate Past President become vacant, the office shall remain vacant until the next elective year.

### Article VII

**Section 7.** The RVP from each Region shall be nominated by a Regional Nominating Committee comprised of one (1) member from each Member Board within the Region. Nominees for RVP must be nominated by a Member Board within their appropriate Region. The current RVP shall chair the Committee without a vote. Each Region's nominee shall be voted on by the AAR's Board of Directors at the first Directors' meeting. No nominations for RVP shall be accepted from the floor. If any Region does not submit a nominee for RVP for the following year or if the Board of Directors does not accept any nominee, the President-elect shall have the authority to appoint a qualified RVP from the membership within the Region with the approval of the Board of Directors or Executive Committee.

In the event the Regional Nominating Committee cannot reach a consensus in the selection of one (1) candidate for RVP, those candidates being considered shall be submitted to the Board of Directors for selection of that Region's RVP.

### Selection Options

- Rotate eligibility among the assigned local associations.
  - Conduct open selection process with each assigned local association having one (1) vote regardless of membership size.
  - Conduct open selection process with "weighted" votes for each assigned association based on membership size.
-

## **IMMEDIATE PAST RESIDENT**

### Position Description - Updated October 2016

#### **FUNCTION**

Serve as Immediate Past President representing the entire association membership and its best interests.

#### **DUTIES AND RESPONSIBILITIES**

Within the limits of the AAR Bylaws and Policies, the Immediate Past President is responsible for and has commensurate authority to:

1. Serve on the Executive Committee as Immediate Past President with voting rights as the chair of the Board of Directors and the Executive Committee. (AAR Bylaws, Article VI, Section 6).
2. Serve on the AAR Board of Directors as a voting, non-quota Director
3. Attend AAR's Executive Committee Meetings, Spring Conference, Planning Session, REALTOR® Caucus and Leadership Conference).
4. Attend all official meetings of the NATIONAL ASSOCIATION OF REALTORS® as a national director (REALTORS® Legislative Meetings, NAR Conference and Expo) (AAR Bylaws, Article VII, Section 2). Directors are required to attend the following meetings, at a minimum:
  - a. NAR 360
  - b. AAR Caucus
  - c. Both Region 11 Caucus meetings (the two Caucus meetings are held the day before the Board of Directors meeting).
  - d. Board of Directors Meeting .On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.
5. Serve as an ex-officio voting Director of the Arizona Association of REALTORS® Foundation for Housing and Community Outreach.
6. Wear your Past President's Name tag proudly.
7. Administer sage advice to incoming and future leaders.
8. Accept our sincere thanks for your Leadership.

## **EXPENSE REIMBURSEMENT - (AAR Policy P.26 C.3)**

### **POLICY C.3 - NATIONAL DIRECTOR REIMBURSEMENT**

National Directors eligible for expense reimbursement shall be those elected or appointed to fill entitlements other than those entitlements assigned Member Board and specifically representing franchise and/or large firm entitlements, as designated by the NATIONAL ASSOCIATION OF REALTORS<sup>®</sup>, and who are not otherwise reimbursed. Authorized reimbursement for National Directors to attend National meetings is contingent upon their attending the Member and Directors Forum, AAR Caucus (if any), the Rocky Mountain Regional Caucus and all meetings of the National Board of Directors at each National meeting. Any exceptions shall be approved at the President's discretion.

**AAR will reimburse the NAR Director up to \$2,500 total travel costs which includes: airfare, hotel, and food.**



## **NAR DIRECTOR**

### Position Description - Updated October 2016

#### **FUNCTION**

#### **DUTIES AND RESPONSIBILITIES**

Within the limits of the Bylaws and Policies, the NAR Director representing Arizona will be required to:

1. Attend NAR's two annual Board of Director meetings.
  - The first BOD meeting is held at the Mid-year Conference in Washington, D.C. in May of each year.
  - The second BOD meeting is held at the NAR Conference in November of each year.
  
2. The Director is required to attend the following meetings, at a minimum:
  - a. NAR 360
  - b. AAR Caucus
  - c. Both Region 11 Caucus meetings (the two Caucus meetings are held the day before the Board of Directors meeting).
  - d. Board of Directors Meeting
    - On very rare occasions, NAR may call a Special Board of Directors meeting. If they do, NAR covers the expenses and ample notice is given.

## **EXPENSE REIMBURSEMENT - (AAR Policy C.3)**

### **POLICY C.3 - NATIONAL DIRECTOR REIMBURSEMENT**

National Directors eligible for expense reimbursement shall be those elected or appointed to fill entitlements other than those entitlements assigned Member Board and specifically representing franchise and/or large firm entitlements, as designated by the NATIONAL ASSOCIATION OF REALTORS®, and who are not otherwise reimbursed. Authorized reimbursement for National Directors to attend National meetings is contingent upon their attending the Member and Directors Forum, AAR Caucus (if any), the Rocky Mountain Regional Caucus and all meetings of the National Board of Directors at each National meeting. Any exceptions shall be approved at the President's discretion.

**AAR will reimburse the NAR Director up to \$2,500 total travel costs which includes: airfare, hotel, and food.**