

President/Executive Officer Task List

<p>Instructions: This section should be filled out by the board President and the EO at the same time. The purpose of this section is to determine the division of duties between the elected leadership and association staff. Place an “X” in the appropriate space or spaces that indicate where the primary responsibility for each item exists.</p>	EO Only	Other Association Staff	Elected Leadership Only	Joint Staff & Leadership	Vendor	N/A
OREA/CREA						
1. Participates in association/regional meetings						
2. Provides input to Area Directors relative to positions on provincial/national association issues						
3. Participates in recommending members for position on provincial/national association committee appointments						
4. Serves on provincial association committees						
5. Serves on national association committees						
6. Attends all/some national association meetings						
Communication						
1. Directs media calls and questions to elected association leadership						
2. Responds directly to media inquiries						
3. Writes/edits press releases						
4. Arranges press conferences						
5. Has editorial and content authority over association publications						
6. Writes articles for association publications						
Community Involvement						
1. Is specifically in charge of the degree of involvement and participation in community activities and civic organizations as an association representative. (i.e. Chamber of Commerce)						
2. Serves on local government and civic advisory bodies						
Membership Education						
1. Solicits/reviews information about prospective education courses and educational speakers for presentation to members						
2. Reviews and discusses such information with the association’s education committee						
3. Organizes and schedules continuing education courses and exam processing						
4. Supervises other staff specialists who perform any or all of the above duties (questions 1-3)						

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Financial Management						
1. Independently develops annual budget						
2. Develops annual budget, accompanied by substantial assistance and direction of leadership						
3. Develops annual budget using computer programs						
4. Performs all bookkeeping and accounting duties						
5. Performs most bookkeeping and accounting duties						
6. Supervises staff bookkeeper or outside accountant						
7. Produces monthly financial statement						
8. Reviews monthly financial statement produced by bookkeeper and/or accountant						
9. Analyzes monthly financial statement and provides narrative report summarizing financial performance and explaining reasons for deviations from budget						
10. Supervises association savings accounts and investments						
11. Develops and implements investment strategies						
12. Conducts/implements financial management in accordance with long-range planning guidelines						
13. Supervises other staff specialists in the performance of any or all of the other activities						
Government and Political Affairs						
1. Conducts research for and writes testimony given by association leadership at public hearings conducted by elected officials and government agencies						
2. Delivers testimony at public hearings on behalf of the association						
3. Researches and writes association position statements and policies related to government issues						
4. Composes correspondence to elected officials on various issues for association leadership signature						
5. Deals directly with elected officials, regulatory personnel and government agencies on behalf of the association						
6. Attends and participates in provincial and national PAC meetings						
7. Supervises other staff specialists in the performance of any or all of the above activities (questions 1-7)						

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Arbitration/Ethics						
1. Processes complaints and applications for arbitration and ethics hearings						
2. Helps select hearing panel members						
3. Schedules hearings						
4. Provides technical support to arbitration and ethics committees						
5. Interfaces with complaints and respondents						
6. Assists ethics committee in complaint investigations						
7. Writes hearing decision letters as directed by ethics committee						
8. Keeps updated on new provincial and national association developments in the areas of arbitration and ethics						
9. Interacts directly with provincial and national association legal counsel and staff on questions related to the Code of Ethics, Standards of Business Practice, ethics and arbitration procedures						
10. Supervises staff specialists or department heads who execute some or all of the above duties (questions 1-9)						
Interaction with Outside Organizations & Suppliers						
1. Is authorized to interact/consult with association legal counsel independently without seeking prior permission of association leadership						
2. Interacts/consults with provincial association services and policy departments						
3. Interacts with supervisory personnel of suppliers for MLS®						
4. Works with outside accountant/auditors						
5. Hires/executes contracts with association office maintenance firms (janitorial, landscaping)						
6. Interacts directly with suppliers and consultants who provide other association services [computer equipment, air-conditioning/heating]						
7. Supervises other staff specialists and/or department heads who execute any or all of the above duties [questions 1-6]						

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Membership						
1. Takes part in [speaks at] all new member orientation sessions						
2. Helps plan and design format of new member orientation program						
3. Visits member offices to give presentations on association membership benefits and activities [or trains staff members to do the same]						
4. Performs basic function of processing membership applications						
5. Maintains membership files						
6. Supervises staff department head, who performs any or all of the above duties						
7. Supervises operation of association store and stationery departments						
8. Is responsible for entire store/stationery operation [i.e. ordering supplier contracts, inventory and so on]						
9. Interacts directly with membership departments of provincial/national association						
10. Readily accessible to general membership on a daily basis						
Multiple Listing Service®						
1. Performs all basic input, book preparation, hot sheet production, etc.						
2. Performs all functions related to supplier relations, including book orders, delivery coordination, invoicing.						
3. Handles all aspects of terminal/computer leasing						
4. Enforces MLS® Rules and Regulations						
5. Ensures that MLS® Rules and Regulations conform to national association policy						
6. Develops and supervises implementation of MLS® administrative office procedures and policies						
7. Conducts training sessions for members on how to correctly use the various MLS® services						
8. Supervises MLS® department staff or MLS® department head						
9. Coordinates reciprocal MLS® activities with other local boards/associations						

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Personnel Administration						
1. Responsible for conducting periodic employee performance evaluations/appraisals						
2. Conducts salary review of staff and determines salary increases and bonuses						
3. Has authority to hire and dismiss all employees						
4. Responsible for training all staff members						
5. Conducts periodic department head/staff meetings						
6. Responsible for writing personnel/staff manual, having documentation reviewed by legal counsel or other authorities, and is responsible for periodically reviewing and updating manual						
7. Performs annual evaluation of EO						
8. Supervises staff specialists or department heads responsible for any or all of the above functions [questions 1-6]						
Staff Development						
1. Selects and budgets for continuing education classes for improving employee skills and job performance						
Miscellaneous						
1. Prepares Executive Committee and/or Board of Directors' agendas prior to meeting						
2. Attends all Executive Committee and/or Board of Directors' meetings						
3. Offers input to Executive Committee and/or Board of Directors as necessary						
4. Submits monthly reports of activities to Board of Directors						
5. Manages property owned by association, including tenant management						
6. Responds to written correspondence addressed to President						