



Volunteer Leader Manual

This manual is organized chronologically. It contains key tasks, duties and reminders specifically for the President, the President-elect, and members of the Board of Directors of SKCR.

The manual is a living document and is edited on a regular basis to adequately reflect the changing needs of the elected leadership, the organization, and its members.

The official duties of the President and President-elect and of the Directors, as described in the SKCR policies and bylaws, are attached to this manual.

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President-Elect

President

JANUARY

Board of Directors:

- Chair the regularly scheduled Board meeting
 1. Review the draft agenda with the CEO
 2. Review Leader Manual with Directors and confirm committee assignments
- Recommend annual audit or review by CPAs with BoD
- Fill any vacant WR Director positions through BoD vote
- Review Professional Standards requirements with BoD via presentation
- Explain RPAC expectation to BoD

Meetings/Events:

- Register for and attend *WR Hill Day* in Olympia held mid-January
- Chair the WR Director caucus at *WR Hill Day* for SKCR
- Discuss hotel room for the NAR mid-year meeting with CEO
- Local Directors encouraged to *WR Hill Day*. WR Directors expected to attend
- Track AREAA/NAHREP etc. events

Committees:

(President is an ex-officio member of ALL committees)

- Attend *Membership and First Citizen Committee* meetings
- Attend *Leadership Development Committee*
- Attend *The REALTORS® Environmental Council (TREC)* annual meeting
- Attend *DEI* and/or *YPN* meetings

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties (stipend is budgeted annually)
- Officers and State Directors eligible for a per diem for attending *WR Hill Day* and meetings

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

January 2023

January 2023

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jan 1, 23	2 Office Closed- New Year's Day (observed)	3	4	5	6	7
8	9	10	11 10:00am YPN January Network & Brunch (Washington 1:00pm Business Practices Committee	12	13	14
15	16	17	18 WR Legislative Days - Olympia - Hotel Capi	19	20	21
22	23	24 9:30am Member Services Committee	25 9:30am Board of Directors	26 9:30am Leadership Development	27	28
29	30	31	Feb 1	2	3	4

President-Elect

President

FEBRUARY

Meetings/Events:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Register on-line for the <i>NAR Midyear Conference</i> in Washington DC |
| <input type="checkbox"/> | <input type="checkbox"/> | Obtain hotel and airline reservations |
| | <input type="checkbox"/> | Attend Region 12 meeting with NAR Directors, if available |

Committees:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>Government Affairs</i> and <i>Executive Committee</i> meetings |
| | <input type="checkbox"/> | Chair <i>Executive / Finance Committee</i> meetings |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>Leadership Development Committee</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>Scholarship Foundation Board</i> meeting; set fundraising goals |

Office visits:

- | | | |
|--|--------------------------|--|
| | <input type="checkbox"/> | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--|--------------------------|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
|--------------------------|--------------------------|---|

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

Officers and Directors confirm events and committees to attend via nwrealtor.com calendar

February 2023

February 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jan 29	30	31	Feb 1	2	3	4
5	6	7 10:30am GAC Meeting	8 10:00am SFCSF Board meeting	9 12:00pm DEI Committee (in-person) (SKCR Office)	10	11
12	13	14	15 10:00am YPN February Network & Brunch (Washington Athletic Club)	16 Region 12 Couer d'Alene	17	18
19	20	21	22 9:30am Executive Committee	23 9:30am Leadership Development	24	25 WR Academy
26	27	28	Mar 1	2	3	4

President-Elect

President

MARCH

Board of Directors:

- Chair the regularly scheduled Board meeting
 1. Review the draft agenda with the CEO
 2. Ensure all Directors know their tasks and committee assignments
- Present annual audit/review of financial statements to the BoD via CPA presentation (often deferred to May)
- Present budget adjustments if necessary
- Discuss dues compliance of membership with BoD (3/31 non-paying members are inactivated)

Committees:

- Attend *First Citizen and Leadership Development Committee* meetings; election opened
- Attend *DEI* and/or *YPN* meetings

Meetings/Events:

- Register for *WR Spring Conference*
- Attend *RPAC Auction*

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-Elect receive a monthly stipend to defray expenses incurred in the exercise of their duties
- In addition, President and President-Elect receive a per diem for attending *WR Spring Conference*

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

March 2023

March 2023							April 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4							1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31		23	24	25	26	27	28	29
							30						

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Feb 26	27	28	Mar 1	2	3	4
			DATE Change: Presidents Circle in Cancun MX until 3/4			
5	6	7 9:30am Member Services & Communications Meeting	8 1:00pm Business Practices Committee	9 12:00pm DEI Committee (Zoom)	10	11
12	13	14	15 9:30am Board of Directors	16	17 AEI - Seattle Hyatt	18
19 AEI - Seattle Hyatt	20	21	22 10:00am YPN March Network & Brunch (Washington Atheletic Club)	23 9:30am Leadership Development 5:00pm RPAC Auction - Bellevue Club	24	25 WR Academy
26	27	28	29	30	31 Scholarship Applications due	Apr 1

President-Elect

President

APRIL

Meetings/Events:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>WR Spring Conference</i> meeting |
| | <input type="checkbox"/> | Chair the pre-caucus meeting of state Directors at SKCR |
| | <input type="checkbox"/> | Chair the caucus of state Directors at the WR conference |
| | <input type="checkbox"/> | Attend <i>Battle of the Barristers</i> ; give opening remarks |

Committees:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>Government Affairs, First Citizen and Executive Committee</i> meetings |
| | <input type="checkbox"/> | Chair <i>Executive / Finance Committee</i> meetings |
| <input type="checkbox"/> | | President-Elect finalizes nominations with the <i>Leadership Development Committee</i> , forwards slate of candidates for election in June |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>Scholarship Foundation Board</i> meeting; select scholarship recipients |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>DEI</i> and/or <i>YPN</i> meetings |

Office visits:

- | | | |
|--------------------------|--|--|
| <input type="checkbox"/> | | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--------------------------|--|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
| <input type="checkbox"/> | <input type="checkbox"/> | President, President-Elect and WR Directors receive a per diem for attending <i>WR Conference</i> |

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

April 2023

April 2023							May 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
						1		1	2	3	4	5	6
2	3	4	5	6	7	8	7	8	9	10	11	12	13
9	10	11	12	13	14	15	14	15	16	17	18	19	20
16	17	18	19	20	21	22	21	22	23	24	25	26	27
23	24	25	26	27	28	29	28	29	30	31			
30													

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Mar 26	27	28	29	30	31	Apr 1
2 Scholarship review week	3	4 10:30am GAC Meeting	5	6 12:00pm DEI Committee (in-person) (SKCR office)	7	8
9	10	11	12-14 WR Spring Conference - Tulalip Resort \$169 - 189			15
16	17	18 10:00am SFCSF Selection meeting	19 10:00am YPN April Network & Brunch (Washington Athletic Club)	20	21	22
23	24	25	26 9:30am Executive Committee	27 9:30am Leadership Development	28	29
30	May 1	2	3	4	5	6

President-Elect

President

MAY

Board of Directors:

- Chair the regularly scheduled Board meeting
 1. Review the draft agenda with the CEO
 2. Ensure all Directors know their tasks and committee assignments
- Present budget adjustments to BoD, if necessary
- Announce Board election dates in June

Meetings/Events:

- Attend the *NAR Midyear Conference* in Washington DC
- Attend the WR reception at *NAR Midyear Conference* and other meetings as recommended by NAR Directors and the CEO
- Attend the *Seattle First Citizen Banquet*; President makes remarks and present award to recipient

Committees:

- Attend *DEI* and/or *YPN* meetings

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-Elect receive a monthly stipend to defray expenses incurred in the exercise of their duties
- President and President-Elect are reimbursed up to \$2,700 for the *NAR Midyear Conference*, with receipts (check current budget) *VP & VP Elect GA budgeted \$2,400. FPC's attend.

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

May 2023

May 2023							June 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 30	May 1	2 9:30am Member Services & Communications Meeting	3	4	5	6 NAR Mid-Year Legislati.
7	8	9	10	11 12:00pm DEI Committee (Zoom)	12	13
NAR Mid-Year Legislative Meetings in DC						
14 First Citizen week 1	15	16	17 9:30am Board of Directors	18 WR Academy	19	20
21 First Citizen week 2	22	23	24 10:00am YPN May Network & Brunch (Washington Athletic Club)	25	26	27
28	29	30	31	Jun 1	2	3

President-Elect

President

JUNE

Meetings/Events:

- Register for *NAR August Leadership Summit*
- Advance register for *NAR Annual Conference* held in November
- Attend *Housing Issues Briefing*; President makes opening remarks

Committees:

- Attend the *Government Affairs* and *Executive Committee* meetings
- Chair *Executive* and *Finance Committee* meetings
- Participate on a candidate interview team. All Directors encouraged to get GA training and participate
- Attend *DEI* and/or *YPN* meetings

Board Elections:

- Review oversight of Board election with CEO
- Contact both successful and unsuccessful candidates with CEO
- Announce the NAR Directorships for election in August

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

June 2023

June 2023							July 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3							1
4	5	6	7	8	9	10	2	3	4	5	6	7	8
11	12	13	14	15	16	17	9	10	11	12	13	14	15
18	19	20	21	22	23	24	16	17	18	19	20	21	22
25	26	27	28	29	30		23	24	25	26	27	28	29
							30	31					

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
May 28	29	30	31	Jun 1 Board Election begins WR AE training	2 WR AE training	3
4 HIB week 1	5	6 10:30am GAC Meeting	7	8	9	10
11 HIB week 2	12	13	14 10:00am YPN June Network & Brunch (Washington Athletic Club) 1:00pm Business Practices Committee	15	16	17
18	19	20	21	22	23	24
25	26	27	28 9:30am Executive Committee	29	30 Board Election ends	Jul 1

President-Elect

President

JULY

Board of Directors:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Chair the regularly scheduled Board meeting |
| | | 1. Review the draft agenda with the CEO |
| | | 2. Ensure all Directors know their tasks and committee assignments |
| | <input type="checkbox"/> | Present budget adjustments if necessary |
| | <input type="checkbox"/> | Present a mid-year financials and membership report |
| <input type="checkbox"/> | <input type="checkbox"/> | Announce Board election results |

Committees:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Participate on a candidate interview team. May, June, July |
| <input type="checkbox"/> | <input type="checkbox"/> | President-elect in coordination with the President selects members for the <i>Planning and Budget Committee</i> which meets in August |
| <input type="checkbox"/> | | President-elect appoints a Chair of the <i>First Citizen Committee</i> |
| <input type="checkbox"/> | | President-Elect and Staff Director review <i>First Citizen Scholarship Foundation</i> positions |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>DEI</i> and/or <i>YPN</i> meetings |

New Directors:

- | | | |
|--------------------------|--|---|
| <input type="checkbox"/> | | President-elect and CEO coordinate orientation for newly elected Board members |
| <input type="checkbox"/> | | President-elect and CEO confirm <i>Leadership Retreat</i> date in 4 th quarter |

Office visits:

- | | | |
|--------------------------|--|--|
| <input type="checkbox"/> | | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--------------------------|--|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
|--------------------------|--------------------------|---|

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

July 2023

July 2023							August 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
						1			1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30	31		
30	31												

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jun 25	26	27	28	29	30	Jul 1
2	3	4	5	6	7	8
9	10	11 9:30am Member Services & Communications Meeting	12 9:30am Board of Directors	Japan Homestay		
16	Japan Homestay			19 10:00am YPN July Network & Brunch (Washington Athletic Club)	21	22
23	24	25	26 New Directors TBD	27	28	29
30	31 NAR Director count confirmed	Aug 1	2	3	4	5

President-Elect

President

AUGUST

Meetings/Events:

- President-elect attends the *NAR Leadership Summit* in Chicago with the CEO
- Register for the *WR Fall Conference*
- Hold NAR Director election for appointment by September 15
- Register for the *WR Fall Leadership Retreat* in October
- Organize Japan Ambassador Association activities for October

Committees:

- Participate on a candidate interview team
- Attend the *Government Affairs Committee* meeting
- President-elect and President Chairs a minimum of two *Planning and Budget Committee* meetings; review and draft next year's budget and business plan
- Newly elected officers and appointed Chairs begin coordination with their assigned staff Directors
- President-elect and newly elected Leadership Development Committee Chair recruits members to serve on the *Leadership Development Committee* which identifies BoD candidates
- Attend *DEI* and/or *YPN* meetings

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties
- President-elect is budgeted up to \$1,200 for airfare and incidental expenses at the *NAR Leadership Summit* in Chicago, NAR pays for two night's hotel

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

August 2023

August 2023							September 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5						1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31			24	25	26	27	28	29	30

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jul 30	31	Aug 1	2 NAR election TBD	3	4	5
6 Planning week	7	8	9	10	11	12
13 NAR Leadership Summit (Chicago)	14	15 10:30am GAC Meeting	16	17	18	19
20 Planning week	21	22	23 10:00am YPN August Network & Brunch (Washington Athletic Club (1325 6th Ave, Seattle, WA	24	25	26
27	28	29	30 9:30am Executive Committee	31	Sep 1	2

President-Elect

President

SEPTEMBER

Board of Directors:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Chair the regularly scheduled Board meeting |
| | | 1. Review the draft agenda with the CEO |
| | | 2. Ensure all Directors know their tasks and committee assignments |
| | <input type="checkbox"/> | Welcome newly elected Directors attending the meeting |
| | <input type="checkbox"/> | Present the <i>Planning Committee's</i> draft budget and business plan |
| <input type="checkbox"/> | <input type="checkbox"/> | Approve a local membership dues amount for next year's billing |
| | <input type="checkbox"/> | Announce the NAR Director election results |

Meetings/Events:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>WR Fall Conference</i> |
| | <input type="checkbox"/> | Chair the pre-caucus meeting of state Directors at SKCR |
| | <input type="checkbox"/> | Chair the caucus of state Directors at the <i>WR Fall Conference</i> |
| | <input type="checkbox"/> | Attend the <i>Past President's Luncheon</i> |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend Japan Ambassador trade mission if scheduled. |

Committees:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Participate on a candidate interview team |
| <input type="checkbox"/> | <input type="checkbox"/> | The President-elect chairs <i>Planning and Budget Committee</i> meeting; review recommended modifications to budget and/or business plan |
| <input type="checkbox"/> | | President-elect attends <i>First Citizen Scholarship Foundation</i> meeting |
| <input type="checkbox"/> | | President-elect attends <i>Leadership Development Committee</i> meeting |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>DEI</i> and/or <i>YPN</i> meetings |

Office visits:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--------------------------|--------------------------|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
| <input type="checkbox"/> | <input type="checkbox"/> | In addition, they receive a per diem for attending <i>WR Fall Conference</i> |

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

September 2023

September 2023							October 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
					1	2	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31				

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Aug 27	28	29	30	31	Sep 1	2
3	4	5 9:30am Member Services & Communications Meeting	6	7	8 WR Director caucus	9
10	11	12	13-15 WR Fall Conference - Yakima Hilton			16
17	18	19	20 9:30am Board of Directors	21 12:00pm DEI Committee (Zoom)	22	23
24	25	26	27	28	29	30
Japan Trade Mission - 10 day window						To Oct 6 →
			10:00am YPN September Network & Brunch (Washington Athletic Club (1325 6th Ave.			

President-Elect

President

OCTOBER

Meetings/Events:

- President-elect plans/holds a *Leadership Retreat* and training for incoming BoD members
- Confirm all local Directors committee assignments
- President-elect and CEO attend the *WR Leadership Retreat* for incoming local presidents
- Confirm air and hotel arrangements for *NAR Annual Conference* in November

Committees:

- Attend the *Government Affairs* and *Executive Committee* meetings
- Chair *Executive / Finance Committee* meetings
- President-elect reviews rosters and chairs for all committees; make appointments
President and President-elect attend *TREC Annual Planting Project*
- Attend *DEI* and/or *YPN* meetings

CEO review:

- President conducts annual review of CEO, with input from President-elect and other officers, for confirmation at the November Board meeting

Office visits:

- Attend scheduled visits, upon request. Encourage Directors to schedule

Expenses:

- President and President-elect receive a monthly stipend to defray expenses incurred in the exercise of their duties
- President-elect is reimbursed for the *WR Leadership Retreat*

Volunteers:

- Recruit one new volunteer and thank one current volunteer
- Send a note to a staff member doing a good job and copy the CEO

October 2023

October 2023

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November 2023

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Oct 1	2	3	4	5	6	7
← From Sep 24						
Japan Trade Mission - 10 day window						
		GAC Meeting				
8	9	10	11	12	13	14
15	16	17	18	19	20	21
WR 2023 Leadership Conference - Spokane (Hotel TBD)						
			1:00pm Business Practices Committee			
22	23	24	25	26	27	28
			9:30am Executive Committee			
29	30	31	Nov 1	2	3	4

President-Elect

President

NOVEMBER

Board of Directors:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Chair the regularly scheduled Board meeting |
| | | 1. Review the draft agenda with the CEO |
| | | 2. Ensure all Directors know their tasks and committee assignments |
| | <input type="checkbox"/> | Welcome newly elected Directors to attend the meeting |
| | <input type="checkbox"/> | Approve <i>Planning Committee's</i> draft budget and business plan |
| | <input type="checkbox"/> | Announce completion of the CEO review |
| <input type="checkbox"/> | <input type="checkbox"/> | President passes gavel to President-Elect |

Committees:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | | Confirms all Committee assignments |
| <input type="checkbox"/> | | Attends <i>Leadership Development Committee</i> meeting |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>DEI</i> and/or <i>YPN</i> meetings |

Meetings/Events:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>NAR Annual Conference</i> in (Anaheim 2023) |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>WR</i> reception and other meetings during <i>NAR Annual Conference</i> as recommended by <i>NAR</i> Directors and the CEO |
| <input type="checkbox"/> | <input type="checkbox"/> | <i>First Citizen Scholarship Foundation</i> meeting; elect candidates for next year's committee |
| <input type="checkbox"/> | | President-elect and Membership Director confirm <i>Installation</i> date |
| <input type="checkbox"/> | | Encourages <i>Installation & Awards Banquet</i> attendance |

Office visits:

- | | | |
|--------------------------|--|--|
| <input type="checkbox"/> | | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--------------------------|--|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-Elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-Elect are reimbursed up to \$2,700 for the <i>NAR Annual Conference</i> , with receipts (check current budget). *Leadership funds available for other officers who wish to attend the <i>NAR Annual Conference</i> (CEO may approve up to \$1,000 each) |

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

November 2023

November 2023

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 2023

Su	Mo	Tu	We	Th	Fr	Sa
						1
						2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Oct 29	30	31	Nov 1 12:00pm DEI Committee (in-person)	2 10:00am SFCSF Board meeting	3	4
5	6	7 9:30am Member Services & Communications Meeting	8 9:30am Board of Directors	9	10	11
12	13	14	15	16	17	18
NAR Annual Conference in Anaheim CA						
			10:00am YPN November Network & Brunch (Washington Athletic Club (1325 6th Ave.			
19	20	21	22	23 Thanksgiving holiday	24	25
26	27	28	29	30	Dec 1	2

President-Elect

President

DECEMBER

Meetings:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>Installation & Awards Banquet</i> for the new BoD |
| | <input type="checkbox"/> | Ensures Annual Awards are presented by the Committee chaired by the Past President |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend an annual holiday lunch for SKCR staff |

Committees:

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the <i>Government Affairs Committee</i> meeting |
| <input type="checkbox"/> | | Finalizes remaining Committee assignments |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend <i>DEI</i> and/or <i>YPN</i> meetings |

Office visits:

- | | | |
|--|--------------------------|--|
| | <input type="checkbox"/> | Attend scheduled visits, upon request. Encourage Directors to schedule |
|--|--------------------------|--|

Expenses:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | President and President-Elect receive a monthly stipend to defray expenses incurred in the exercise of their duties |
|--------------------------|--------------------------|---|

Volunteers:

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Recruit one new volunteer and thank one current volunteer |
| <input type="checkbox"/> | <input type="checkbox"/> | Send a note to a staff member doing a good job and copy the CEO |

December 2023

December 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 2024

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Nov 26	27	28	29	30	Dec 1	2
3	4	5 10:30am GAC Meeting	6	7 WR Exec Orientation	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	Jan 1, 24	2	3	4	5	6

DUTIES OF THE PRESIDENT of SEATTLE KING COUNTY REALTORS®

Key responsibilities:

Serve as the chief elected official of the Association. Serve as the Chairman of the Board of Directors. Serve as Treasurer for the Association and be responsible for the Committee operations that relate to monitoring fiscal performance.

Duties as Chairman of the Board:

1. Chair the meetings of the Board of Directors and direct its activities. *{Every other month.}*
2. Review, with the Board, all actions of assigned Committees, Sub-committees and Work groups to assure that such actions are in compliance with adopted policies, budget and strategic plan. *{This is generally accomplished through the Board meetings.}*
3. Form any special Committees and Work groups necessary to accomplish the major goals of the administrative year. Appoint all Chairpersons of standing and special Committees and Work groups of the Association, based on the recommendations of the President-Elect and the Vice Presidents. *{Note: Some standing committee chairs are elected officers.}*
4. Have the responsibility of directing, on behalf of the Board of Directors, the actions of the Chief Executive Officer. *{The President and CEO generally work out an informal schedule of meetings to discuss Association operations, or otherwise agree on a method of regular communication.}*
5. Serve as coordinator of all formal leadership activities and be responsible for the performance of the elected officers and the Board of Directors.
6. Assure that the instructions of the Board of Directors are carried out.
7. Be ready to make decisions affecting the members on problems or issues from day to day.
8. Have a working knowledge of the bylaws, the policy manual, *The Code of Ethics and Arbitration Manual* and *Robert's Rules of Order*.
9. Be familiar with the Association's Strategic and Operational Plans and assist in the implementation of the objectives and strategies.

Duties as Treasurer:

10. Chair the meetings of the Executive and Finance Committee and appoint its members.
11. In general, perform all duties incident to the role of Treasurer, including the development of the association's financial policies. Call for an annual accounting audit or review with the concurrence of the Board of Directors. *{The Association currently uses the CPA firm of BDO USA and generally alternates between a review and an audit each year. This CPA firm also reviews the WR financials annually.}*
12. Have charge and custody of and be responsible for all funds and securities of the Association and make recommendations for the deposit of monies in financial institutions, as specified in the approved SKCR financial policies. *{The Director of Finance, Scott Parsons, prepares checks based on invoices, which the CEO and the Director of Membership sign. The President and President-elect are also authorized signers for Association's accounts.}*
13. Make such financial reports and render such statements as good business practice dictates at all Directors' meetings, the annual membership meeting and as requested by the Board of Directors. *{The Director of Finance prepares monthly financial reports that are presented to the Board at its meetings.}*
14. Along with the President-Elect and Chief Executive Officer, may sign all official contracts or instruments, which the Board of Directors has authorized to be executed.

Duties as the chief elected official:

15. Serve as chief spokesperson for the Association. *{The Association offers spokesperson training annually.}*
16. Meet with the leadership of other organizations, from time to time, to discuss problems of mutual interest to the real estate industry. *{Done at NAR and WR meetings.}*
17. Accept the responsibilities as designated by both the National Association of REALTORS® and the Washington Association of REALTORS®; attend the NAR business meetings, serving as the delegate to its convention and attend the WR assemblies. *{The Association reimburses the President for travel expenses to the NAR mid-year and annual meetings, and the WR spring and fall business conferences.}*
18. Be an ex-officio member of all Committees of the Association except the Grievance and Professional Standards Committees.
19. Attend leadership training and planning session, to be held prior to serving as President.
20. Make every attempt to attend all major functions of the Association or shall see that the President-Elect or one of the other Officers attends in his/her absence. *{Brief remarks are often necessary.}*
21. Keep abreast of the accomplishments of the Association, WR and NAR so as to be prepared to discuss these matters with the membership.
22. Annually solicit at least one SKCR member, who is not currently serving in a volunteer capacity, to serve as: 1) a SKCR committee or work group member, 2) a SKCR Director or 3) a WR Director.

Qualifications:

1. Must be a REALTOR® member in good standing.
2. Must have held the position of President-Elect of the Association.
3. Expected to be a contributor to RPAC.
4. Must attend a training session on the enforcement of the Code of Ethics within the last two years and attend a Governmental Affairs Housing Issues Briefing annually.
5. Must be actively engaged in the real estate business and hold an active real estate license from the state of Washington.

Term

The President is elected for a term of one year. The President receives a monthly stipend to defray the expense of official duties that are not otherwise budgeted by the Association. The amount of the stipend is determined in the annual budget.

DUTIES OF THE PRESIDENT-ELECT of the SEATTLE KING COUNTY REALTORS®

Key Responsibilities

Serve as a replacement for the President if he or she is unable to fulfill any of his or her assigned duties. Oversee and be responsible for the Committee operations that relate to strategic and operational planning and formulation of the annual budget for the Association. Serve as Secretary for the Association.

Duties as Chair of Budget and Planning:

1. Direct the activities of the following Committee and act as its Chairperson: Planning, and shall represent the Committee, its Sub-committees and assigned Work groups before the Board of Directors. *{Also act as the Chair of the Nominations Committee, which is a subcommittee of Planning. The Nominations subcommittee approves a slate of candidates for election to the Board of Directors each June.}*
2. Prepare, with the assistance of the Planning Committee and in conjunction with the President, Vice Presidents and Chief Executive Officer, the Association's Strategic, Operational Plans and Annual Budget for the approval of the Board of Directors. *{The Planning Committee is the annual Budget Committee for the Association and generally accomplishes its work over two to three meetings in August and September.}*
3. Serve as vice-Chairperson of the Board of Directors and shall serve as a SKCR Director, by virtue of election to the position of President-Elect. *{Board meets every other month.}*
4. Review all actions of assigned Committees, Sub-committees and Work groups to assure that such actions are in compliance with adopted policies, budget and strategic plan. *{This is generally accomplished through each Board meeting.}*

Duties as Secretary:

5. Carry out the responsibilities of the Secretary for the Association. Keep, or cause to be kept, the minutes of the meetings of the Board of Directors and all official meetings of the Association. Issue, or cause to be issued, all notices with the provision of the bylaws as required by law. Maintain appropriate historical records, minutes, files and legal documents. The Chief Executive Officer will assist with this function. *{In practice, the CEO keeps the Board meeting minutes and carries out the legal and correspondence duties on behalf of the Secretary. The policy manual lists the key documents that are maintained.}*
6. Along with the President and Chief Executive Officer, may sign all official contracts or instruments, which the Board of Directors has authorized to be executed.

Duties as the #2 elected official:

7. Be responsible for all the duties and responsibilities of the President in the event of the President's absence or incapacity.
8. With the assistance of the Chief Executive Officer, prepare and hold a leadership training and planning session for Directors and officers, Committee Chairpersons, no later than December of the year preceding presidency. *{This session is normally held in October.}*
9. Make every attempt to attend the WR and NAR business meetings, the NAR Leadership Summit, the WR/OAR Leadership Institute and may serve as the delegate to the convention of the National Association of REALTORS®. *{The Association reimburses the President-elect for travel expenses to the NAR mid-year and annual meetings, the WR spring and fall business conferences, the NAR leadership retreat in August and the WR leadership retreat in October.}*
10. Make every attempt to attend all major functions of the Association and shall be prepared to act on behalf of the President in his/her absence. *{Brief remarks may be necessary at these functions.}*

11. Have a working knowledge of the bylaws, the policy manual, *The Code of Ethics and Arbitration Manual*, and *Robert's Rules of Order*.
12. Be familiar with the Association's Strategic and Operational Plans and assist in the implementation of the objectives and strategies.
13. Keep abreast of the accomplishments of the Association, WR and NAR so as to be prepared to discuss these matters with the membership.
14. Be prepared to accept all other duties as requested by the President, and maintain continuous liaison with the Chief Executive Officer and other assigned staff to ensure proper coordination in the conduct of the Association's business.
15. Annually solicit at least one SKCR member, who is not currently serving in a volunteer capacity, to serve as: 1) a SKCR committee or work group member, 2) a SKCR Director or 3) a WR Director.

Qualifications

1. Must be a REALTOR® member in good standing.
2. Must have held the position of 1) an officer of SKCR or 2) a SKCR Director who has served one additional year as either A) a Standing Committee, Sub-committee or Work group Chairperson of SKCR, B) a Standing Committee member of SKCR for at least two years, or C) a Director of WR, at the time the candidate would normally be sworn into office.
3. Expected to be a contributor to RPAC.
4. Must attend training on the enforcement of the Code of Ethics within the past two years and attend a Governmental Affairs Housing Issues Briefing annually.
5. Must be actively engaged in the real estate business and hold an active real estate license from the state of Washington.

Term

The President-Elect is elected for a term of one year and succeeds to the office of President. The President-Elect receives a monthly stipend to defray the expense of official duties that are not otherwise budgeted by the Association. The amount of the stipend is determined in the annual budget.

SEATTLE KING COUNTY REALTORS® BOARD MEMBER OVERVIEW

Responsibilities

A Director of Seattle King County REALTORS® establishes policies and priorities based upon the Association's mission and vision. A Director is elected to act on behalf of the members, works to ensure the financial stability and growth of the Association and works to promote the real estate industry generally throughout King County and the region.

Commitment

- A Director's term of office is generally 2 years, depending on the position (see position description).
- Attendance required at six Board meetings per year at the SKCR Bellevue office (three hours each).
- Reads and reviews the Board meeting agenda and supporting materials prior to each Board meeting.
- Serves on one of SKCR's committees/subcommittees during term in office. (quarterly meetings).
- Attends the following additional meetings/events: Housing Issues Briefing (1/2 day in June); SKCR Leadership Retreat (one-day fall event); Awards & Installation Banquet (evening event held end-of-year). In addition, Directors are also encouraged to attend the First Citizen's Award Event (optional).
- Directors are encouraged to invest at least \$100.00 each year to RPAC (The REALTORS® Political Action Committee).
- Directors receive periodic emails and texts from SKCR which may contain briefings, memos and correspondence. All Directors are required to possess the capacity and technology to receive and respond to electronic communications.
- Total time commitment is approximately 2-3 hours a month.

Attributes of a Good Board Member

- A successful, stable real estate career.
- Commitment and desire to improve the real estate industry in the Puget Sound region.
- Commitment to support the work of the REALTOR® organization.
- The qualities of high integrity, industry knowledge, expertise, and experience.
- Team-focused, with an ability to leave personal agendas and biases off the table.
- Excellent communication and business management skills.
- Knowledge of strategic and business planning techniques.
- Willingness to act as a conduit between the members and SKCR leadership.
- Creativity, enthusiasm and a desire to take a proactive role in the future of your profession.

Expense Reimbursement

Directors serve at their own expense and are expected to assume the cost of attendance to special events, such as the Awards & Installation banquet. SKCR Officers receive a stipend and/or expense reimbursement as approved annually in the association budget.

BOARD OF DIRECTORS CHECKLIST

Board Meetings:

- For virtual Board meetings via Zoom, please keep your camera on. We like to see you.
- Review all meeting material before the BOD meeting. Email questions in advance.
- Read the monthly Broker Bulletin (every third Monday)
- C2EX Certification
- Fairhaven training
- Join at least one committee - www.nwrealtor.com/committees

Legislative and Political Support:

- Attend a Government Affairs meeting
- Register and attend Hill Day in January
- Invest extra \$\$ in RPAC and donate an item to our RPAC Event - www.rpacauction.com
- Come to our RPAC event in March
- Attend the Housing Issues Briefing in June

Be an Ambassador:

- Tell your office about REALTOR® Scholarships
- Have Russ come to your office to speak about REALTOR® Value
- Tell 5 agents about your REALTOR® work
- Tell 5 non-REALTOR® agents about your REALTOR® work
- Recruit 1 REALTOR® to join a committee.
- Invite 1 REALTOR® to run for the Board
- Follow and engage with all of Association's social media channels
- Reach out to a person of influence in your community

Event Support:

- Invite 10 agents to come to REALTOR® events throughout the year
- Attend Battle of the Barristers and invite your office
- Attend a YPN Event
- Let your office know about First Citizen Attend the First Citizen Dinner
- Attend the NAR Conference (May and November)

Affiliate Support:

- Use one of our SKCR Affiliates from the Affiliate list - www.nwrealtor.com/resources/realtor-affiliates
- Get a new Affiliate to join SKCR
- Meet 5 of our SKCR Affiliates and thank them for their support
- Attend and support one Affiliate event

Staff Support:

- Learn all Staff names and their positions - Russ, Taylor, Scott, Darla, Marie, Kelley, Lisa, Val
- Quarterly, thank one staff member for a job well done and CC Russ