



CHAPTER COMPLIANCE 2023

C090 CHARLESTON CHAPTER

Congratulations! Your NARPM 2023 Chapter Compliance Application form has been approved!

The chapter has met all recertification requirements and is fully certified.

Levels of Chapter Recertification

Full recertification

The chapter has met all recertification requirements, indicated by compliance with items listed on the certificate of compliance. Only fully certified chapters are eligible for Chapter Excellence Awards. Once recertified, an email will be sent.

Chapter in Review (Amended 2022)

Should the Chapter submittal displays lack of submission of any items on the certificate of compliance. Chapters will have six (6) months from compliance deadline to restore their certification. NARPM® Board of Directors must confirm that a Chapter can be taken off Chapter in Review status.

A Chapter will be placed in **Chapter in Review/Conditional Compliance** if documents are not submitted by compliance deadline. Members of the chapter will not be notified when a Chapter is placed in conditional compliance. The chapter must meet the chapter compliance deadline for the following year.

De-certification

De-certification must be preceded by a period of Chapter in Review and indicates continued non-compliance of recertification requirements. NARPM Board of Directors must approve all de-certification of chapters.



**CHAPTER COMPLIANCE 2023
ATTENDANCE REQUIREMENTS MET in 2022**

C090 CHARLESTON

Compliance Question:

How many Chapter Leader Calls, hosted by RVPs, did the chapter president, or their representative, participate in? Your chapter president, or their representative, must attend at least two of these calls to obtain chapter compliance.

February 9, 2022 Attendee(s): Theonis Brown

June 15, 2022 Attendee(s): Theonis Brown

Chapter Bylaws Requirements for President and/or President-Elect to attend Chapter Leadership Training at Annual Convention on October 20, 2022 AND/OR Nuts and Bolts Virtual Sessions on November 16, 2022.

October 20, 2022 Attendee(s): Aaron Silverman

November 16, 2022 Attendee(s): Nataliya Matejka; Aaron Silverman

Bylaws of The Charleston Chapter of
The National Association of Residential Property Managers

Updated and adopted July 13, 2022

ARTICLE I: Name, Purposes, Powers and Definitions

Section A: Name

The name of this organization shall be the Charleston Chapter of the National Association of Residential Property Managers, Inc. hereinafter referred to as the Chapter.

Section B: Purpose

The purposes for which the organization is established is to:

1. Establish a permanent trade association in the residential property management industry in Charleston South Carolina.
2. To promote a standard of business ethics, professionalism and fair practices among its members.
3. To establish and promote education of its members.
4. To provide and promote an exchange of ideas regarding residential property management.
5. To educate and promote legislative initiative in the State of South Carolina.

Section C: Powers

The chapter may exercise all powers granted to it as a corporation organized under the nonprofit corporation laws of the State of South Carolina.

1. The chapter shall be subject to all rules, regulations, ethics, and standards and bylaws of the National Association of Residential Property Managers, Inc.
2. Chapter bylaws shall not conflict with those of the National Association of Residential Property Managers, Inc. hereinafter referred to as the national association.

Section D: This chapter's geographical definition shall be: Charleston, South Carolina

ARTICLE II: Membership

Professional, Associate, Support Staff, Affiliate Member, Junior, Student, Academic and Honorary Members.

Section A: Professional Member

Professional Member shall be ~~in~~ an individual actively engaged in the management of residential properties as an agent for others. The individual must follow his/her specific state regulatory licensing ~~la~~ regarding licensure in performing the duties of a property manager. This member has completed a course of instruction covering the NARPM Code of Ethics.

A professional member may also be an employee of a company, or employee of a property owner or employee of an investor, who handles all aspects of residential property management. These individuals must comply with state licensing laws.

Section B: Associate Member – grandfathered January 1, 2021

An Associate Member shall be an individual actively engaged in the management of residential properties as an agent for others. The individual must follow his/her specific state regulatory licensing law regarding licensure in performing the duties of the property manager. An Associate Member cannot hold the RPM and/or MPM designation or hold effective office. This member has never completed a course of instruction covering the NARPM Code of Ethics.

An Associate Member may also be an employee of a company, or employee of a property owner, or employee of an investor, who handles all aspects of residential property management. These individuals must comply with state licensing laws.

Section C: Support Staff

A Support Staff Member shall be a person acting in the role of support in the office of a professional Member and the Support Staff Member must not be acting in a capacity requiring licensure according to his/her states regulatory licensing law. A support Staff Member does not vote or hold effective office.

Section D: Affiliate Member

An affiliate Member shall be an individual or business entity which provides products, services or expertise to the residential property management industry. Requirements relating to acceptance into affiliate membership, suspension of affiliate membership shall be identical to those specified for members, except that affiliate members are not eligible to vote; However, affiliate members cannot be a chairperson and can serve in advisory positions to the executive committee or chairpersons or committee members.

The Chapter shall recognize NARPM national Affiliate Members as Affiliate Members of this Chapter.

Section E: Honorary Member

Honorary membership shall be bestowed upon individuals who, are recommended by the chapter board of directors to the National Association Board of Directors, have rendered or continue to render distinguished service to the Chapter or the profession of property management. Honorary members shall pay no dues or other assessments, and shall be eligible to participate in the usual activities of the association, except they shall be ineligible to vote, hold office or serve as a member of the executive committee.

Section F: Life Member

Life members shall be all national past Presidents of NARPM. Life membership will begin as the President's term is completed. Dues will be waived for Life members. Other members

who qualify may apply for Life Member as outlined in the national bylaws and complete the approved application.

Life Members shall not pay dues and are strongly encouraged to complete a course of instruction covering the NARPM Code of Ethics. They are eligible to participate in the usual activities of the Association and its Committees and are eligible to vote and hold office.

- All National Past Presidents shall be deemed Life Professional Members of the Association
- Shall be bestowed upon individuals who have retired from the property management business and, in the opinion of the Board of Directors, have rendered, or continue to render, distinguished service to the Association or the property management profession. An application to the NARPM National Board of Director must be approved in order to hold this membership type.

Section G: Company Membership

Company Membership is offered to the responsible individual of the company. In order to hold Company Membership, the company must have 4 members, which is a combination of Professional and Support Members, with 2 out of the 4 being Professional members. Additional Professional Members, Support Staff and Associate Members may register under the company for an additional fee. Membership categories under the Company will follow the same eligibilities and requirements as outlined above.

Section I: Application by Professional, Associate, Support Staff, Junior, Student, or Academic Members:

1. Acceptance into membership: An applicant for membership in the chapter shall first be a member of the national association. A member of the national association may be a member of more than one chapter as long as that member meets all requirements for each chapter membership. New Members must complete a Code of Ethics course of instruction from the National Association of Residential Property Managers to become a Professional Member.
2. Vote: Voting member shall be eligible-to vote in person at the annual meeting of the chapter in which officers are elected. Any member shall be eligible to vote at all meetings of subcommittees upon which the member serves, if any.

ARTICLE III: Suspension, termination and Registration of Membership

Section A: Suspension of Membership.

Suspension of membership shall result in a member being unable to vote in chapter matters for a period of time designated by these or the national association bylaws or, where such discretion is authorized by the national association, for any one of the following reasons:

1. Suspension of membership: Suspension of membership for reasons stated in the bylaws of the national association.
2. By notification of the National NARPM Board of Directors as a result of violations of the Code of Ethics and Standards of Professionalism.

Section B: Termination of Membership

Membership shall be terminated for reasons identified below. Upon termination, a member shall lose all rights and interests in the chapter and the national association.

1. Resignation:
 - a. Any member, other than Affiliate Member, may resign at any time by forwarding a letter stating such intent to the Charleston Chapter and the National Association, if applicable. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
 - b. Affiliate member may resign at any time by forwarding a letter stating such intent to the Chapter. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
2. Delinquency in Payments: Any member failing to pay sums due to the National Association within 30 calendar days of an invoice due date, shall be considered delinquent. Delinquency status shall remain in effect until payment of obligations is made in full, whichever occurs first.
3. Failure to Pay Obligations: Membership shall terminate automatically when a member fails to pay annual chapter dues within 75 days of the due date. Members may file a letter of appeal to the executive committee should an extension be needed to pay obligation.
4. Code of Ethics Violation: By notification from the National Association to the Chapter executive committee, of a violation(s) of the Code of Ethics and Standards of Professionalism or for non-payment of national annual dues.

Section C: Reinstatement of Membership

A former member still meeting all membership requirements shall be reinstated:

1. Upon request, if such request is received during the calendar year during which a resignation occurred.
2. Upon request, provided that all financial indebtedness incurred has been paid and is current.
3. After a waiting period of one calendar year from the date of termination as a result of a presidential request or by an action of the board of directors of the national association.
4. Upon request through the normal application procedures, if the resignation occurred beyond the current fiscal year.

ARTICLE IV: Executive Committee/Board of Directors

Section A: Responsibilities

The chapter executive committee/board of directors, hereinafter known as the committee, shall have responsibility for the management of the chapter and shall exercise all rights and powers not expressly reserved by these bylaws or the bylaws of the national association. Such management responsibilities shall include but not be limited to:

1. Establishing and implementing an organization framework for the chapter.
2. Establish new and modifying existing operating rules that are not inconsistent with these bylaws, the bylaws of the national association of their intent. Change's to the bylaws must be submitted to the board of directors of the national association for approval.
3. Establishing annual chapter dues, application fees and special assessments.
4. Establishing new committees and dissolving existing committees.

Section B: The Executive Committee

All chapter executive committee members should faithfully attend all chapter executive committee meetings, the executive committee, hereinafter known as the committee shall be composed of five (5) officers as follows:

1. President: The president shall:
 - a. Serve as the chief executive officer of the chapter.
 - b. Preside at all meetings of the chapter.
 - c. Act as an alternate signatory for funds withdrawn from the chapter account(s).
 - d. Sign all legal documents.
 - e. Undertake responsibility for such other activities as deemed appropriate by the committee.
 - f. Shall ensure the completion of all documentation required by the National Association.
 - g. Serve a term of two years commencing with the beginning of the new calendar year.
 - h. Must be a Professional Member of the Chapter.
 - i. Must attend annual Board Leadership Training offered by the National Association of Residential Property Managers.
2. President-elect: The president-elect shall:
 - a. Act as an alternate signatory for funds to be withdrawn from the chapter's account(s).
 - b. Fulfill the responsibilities of the president during his/her absence.
 - c. Replace the president at the at the end of the fiscal year.
 - d. Automatically accede to the presidency during a calendar year when the presidency becomes vacant.
 - e. Undertake other activities as are deemed appropriate by the president.
 - f. Serve a term of two years commencing with the beginning of the calendar year.
 - g. Must be a Professional Member of the Chapter.
 - h. Notify all chapter members of upcoming meetings
 - i. Coordinate speakers and lecturers that are relevant to the residential industry for chapter meetings
 - j. Undertake responsibility for such other activities as deemed appropriate by the committee
 - k. Oversee the submission of Chapter reports including Chapter Excellence submission
 - l. Must be back up or be in attendance at the annual Board Leadership Training offered by the National Association of Residential Property Managers if the President is unable to attend.
3. Secretary: The secretary shall:

- a. Maintain current chapter membership records to coincide with the national associations membership database.
 - b. Record, maintain and distribute minutes of all regular and special meetings of the committee as appropriate.
 - c. File all federal, state and local reports as needed.
 - d. Undertake responsibility for such other activities as deemed appropriate by the committee.
 - e. Serve a term of two years commencing with the beginning of the calendar year.
 - f. Must be a Professional Member of the Chapter.
4. Treasurer: The treasurer shall:
- a. Be signatory for all funds withdrawn from chapter account(s).
 - b. Distribute annual renewal notices for chapter dues and special assessments.
 - c. Deposit all funds into a federally insured financial institution.
 - d. Prepare a financial report for the committee upon request.
 - e. Prepare an end of fiscal year report for the national association.
 - f. File tax and other financial reports with the appropriate government agencies.
 - g. Undertake responsibility for other such activities as deemed appropriate by the committee.
 - h. Serve a term of two years commencing with the beginning of the calendar year.
 - i. Must be a Professional Member of the Chapter.
5. Past President
- a. Shall serve as Chairman of the Nominating Committee.
 - b. Undertake responsibilities as assigned by the President.
 - c. Serve a term of two years commencing with the beginning of the calendar year.

ARTICLE V: Eligibility, Nomination, Election, Terms of Office and Vacancies

Section A: Eligibility

To be eligible to serve as a chapter officer an individual shall be a member in good standing with both the chapter and the national association. Furthermore, the chapter member must be willing to fulfill the duties of the office to which he/she is elected, including those duties relating to the national association.

Section B: Notification of Members

Chapter members shall be notified in writing, or electronically if approved by the Chapter Executive Committee, of the pending election and nominations solicited from chapter members at least thirty (30) days prior to the end of the calendar year. Nominations shall be done in one way:

- a. In Person: Any member who is present during the electoral process can be nominated.

Section C: Elections

Elections shall be conducted no later than September chapter meeting, or electronically no later than the month of September, if approved by the chapter executive committee, prior to the end of the calendar year.

1. Presiding Authority: The outgoing president shall conduct the election. The outgoing president can delegate the electoral process to the president-elect or any other chapter member provided that member is not a nominee.
2. Nominating Committee – The immediate past president shall serve as chair of the nominating committee and the President shall appoint the other two member of the committee. The recommendation of the Nominating Committee shall be approved by the Charleston Chapter Executive Committee and presented to the membership for final vote.
3. Uncontested Offices: The presiding authority shall identify those offices for which there is only one nominee. Upon a motion to close the nominations for such offices, that nominee shall be considered duly elected.
4. Contested Offices: in the case of contested office(s), each office shall be dealt with through a ballot presented to those who are in attendance at the chapter meeting, or electronically if approved by the chapter executive committee. The nominee receiving a simple majority shall be elected to the position.
5. The Chapter shall/shall not (choose one) allow nominations from the floor of the chapter meetings. If electronic elections take place write-in Candidates must be solicited.

Section D: Term of office.

An officer's term of office shall commence with the beginning of the chapter's calendar year and conclude at the end of the following year.

Section E: Vacancy

An office shall be declared vacant when an officer:

1. Resigns that office through written notification to the president or the secretary.
2. Is no longer eligible for membership in the chapter or the national association.
3. Is no longer capable of fulfilling duties of the office involved.

Section F: Filling a Vacated Office

In the event that the position of president is vacated, the president-elect shall automatically fill that position and shall continue to serve as both president and president-elect. In the case of other officers, a vacated office shall be filled:

1. When: When more than three (3) calendar months remain before the next election at which time the vacancy shall be filled.
2. Procedure: By an individual nominated and approved by the executive committee.

ARTICLE VI: Meetings, Locations and Majority Rules

Section A: The executive committee shall meet with the same frequency as the chapter meetings, or at a time approved by the chapter executive committee. which must be no fewer than four (4) meetings annually.

1. Notice of Regular Meeting: With the advice and consent of the president, the secretary shall notify all members of the executive committee of the date, time and place by regular letter mailed or via email to each member of the committee.
2. Waiver of Notice: Attendance by any member of the executive committee at a regularly scheduled meeting at which date, time and place is established for the next meeting shall constitute a waiver of notice of the next regular meeting of the committee.
3. Electronic Meetings: If approved by the chapter executive committee, meeting can be held electronically in order to conduct the business of the chapter.

Section B: Location

All meetings of the chapter shall be held within the geographic definition of the chapter. All meetings of the executive committee shall be held within the geographic definition of the chapter unless otherwise waived by all the members of the executive committee. Annual meeting location of the Chapter shall be approved by the Executive Committee.

Section C: Quorum

1. A majority of the executive committee officers in attendance shall constitute a quorum.
2. Quorum: A quorum to conduct business by the members shall be 10% of the member eligible to vote at regularly scheduled meeting. A chapter event can be held without a quorum but no business can be conducted.

Section D: Simple Majority Vote

All actions and decisions of the executive committee shall be made official by simple majority vote of the members present at any regulatory of the members present at any regular or special meeting of the committee, unless otherwise precluded by law.

ARTICLE VII: Committees

Section A: Appointment

Except as otherwise stated in these bylaws or the bylaws of the national association, the chairperson and members of all subcommittees shall be appointed by the president with the advice and consent of the executive committee.

Section B: Responsibilities

Committees shall undertake such responsibilities as are identified in these bylaws or as may be assigned to them by the president with the advice and consent of the executive committee. No subcommittee may take any action on behalf of or representative of the chapter unless specifically authorized by the executive committee.

Section C: Creation and Dissolution

The president, with the advice and consent of the executive committee, shall have the authority to create and dissolve subcommittees according to the needs of the chapter.

ARTICLE VIII: Code of Ethics and Standards of Professionalism

Acknowledgment and Enforcement

The Code of Ethics and Standards of Professionalism shall be approved by the National NARPM Board of Directors.

As a condition of membership all Professional Members of NARPM must complete a NARPM Code of Ethics training. Each Professional Member of the Association is required to complete a NARPM approved ethics training either in classroom or through other means within ninety (90) days of making application, as approved by the Board of Directors of NARPM. The association shall design a new course of instruction each four-year period to meet the requirement of membership.

Failure to satisfy this requirement within ninety (90) days of making application to the association will result in the membership of the Conditional Member being suspended. If a Conditional Member has not taken a new member ethics class during their first year (12 months) of application, they will be terminated and will need to reapply for new membership.

Section A. Acknowledgment: Each applicant for membership in the Association shall read and be familiar with the Association Code of Ethics and Standards and Professionalism. Continual adherence to the Code is mandatory for membership in the Association. Professional Members shall have successfully completed a course of instruction on the NARPM Code of Ethics.

Section B. Enforcement: The Board of Directors shall be responsible for enforcement of the Code of Ethics and Standards and Professionalism. Should a complaint be filed with the Board, the Board is charged with being fair and equitable to both Complainant and Respondent. The complaint will be turned over to three Professional Standards Sub-Committee to investigate violations. The Committee shall report its findings to the Board; the Board will make a determination on the charges and take appropriate action.

Section A: Chapter Charter

A Chapter Charter is granted only upon the acknowledgement that the chapter members shall:

1. Be familiar with Code: Read and be familiar with the applicable Code of Ethics to which continual adherence is mandatory for continuation of a Chapter Charter and individual membership.
2. Be unopposed to Application: By receipt of the Chapter charter, the chapter does hereby formally agree to not take any legal action(s) against the national association, its officer(s), director(s), committee chairperson(s) or sub-committee member(s) for any prescribed action identified by these bylaws or the bylaws of the national association taken for the purpose of enforcing the applicable Code of Ethics and Standards of Professionalism.

Section B: Enforcement

It is the duty of the President of the chapter to report all violations to national associations Code of Ethics and Standards of Professionalism to the national associations grievance committee.

ARTICLE IX: Financial Considerations

Section A: Calendar Year

The chapter's financial year shall be calendar year.

Section B: Chapter Dues

The Chapter may charge annual and prorated dues, subject to approval by the nation association, as outlined below:

1. Payable: Dues for local chapters are payable no later than January 1 of each year.
2. Nonpayment of Dues: Failure to pay the annual chapter dues within 60 days after the first day of the year shall result in automatic termination of chapter membership unless are extenuating circumstances.
3. Member Dues: The amount of the Chapter dues for all members and each class of membership shall be established annually by the board of directors during the budgeting process.
4. Affiliate Dues: The amount of local chapter dues for Affiliate dues shall be established annually by the board of directors during the budgeting process. The chapter will charge dues of National Affiliate members.
5. Late Fees: Any payment received after the due date will be considered late, and a late fee will be assessed. The Board of Directors must approve any schedule of late fees or returned check fees during the budgeting process.

Section C: Special Assessments

Special Assessments may be established by the executive committee and imposed upon its chapter members and/or affiliate members for specific funding purpose. The purpose and amount of any special assessment shall be announced at a regular or special meeting of the chapter prior to the imposition of such an assessment. No more than one special assessment may be imposed in any calendar year.

Section D: Budget

The treasurer, in conjunction with the executive committee, shall prepare an itemized budget of income and expenses for each calendar year. The budget shall not exceed the chapter's ability to pay the same and shall be approved by the Charleston Chapter Executive Committee or board of directors.

Section E: Non-Binding

The chapter shall not have any authority to financially obligate or bind the national association for any reason.

ARTICLE X. Proposals and Procedures for Amending

Section A: Proposals

Amendments to these bylaws may be proposed by a chapter member or board of director of the national association at any time through a letter addressed to the executive committee and presented or mailed to the secretary. Any proposal shall be studied by the entire executive committee or an officer of the executive committee or by a subcommittee created and/or assigned for that purpose as appointed by the president.

Section B: Procedure for Amending

The entity assigned for the purpose of reviewing proposed Bylaw revisions shall present the proposed amendment to the executive committee with its findings and proposed recommendations of actions. A Two-Thirds majority of the Executive Committee is necessary in order to amend these bylaws.

Once approved by the Chapter Executive Committee, Amendments shall be subject to approval by the board of directors of the national association prior to their implementation or adoption by the chapter and final copy of these bylaws are to remain on the file at national's office.

ARTICLE XI: Miscellaneous

Section A: Invalidity

The invalidity of any provision of these bylaws shall not impair or affect in any manner the validity, enforceability or effect of the remainder of these bylaws.

Section B: Waiver

No provision of these bylaws shall be deemed to have been abrogated or waived by reason of any failure to enforce the same, regardless of the number of violations or breaches which may have occurred.

Section C: Hold Harmless and Indemnify

The chapter shall hold harmless and indemnify members of the executive committee, officer(s), subcommittee chairperson(s) and subcommittee members, as well as the national association, its board of directors, officers, chairpersons and committee member who are acting within the scope of their responsibilities, duties or these bylaws.

Section D: State Laws

These bylaws may be amended to conform and comply with the laws, statutes, rules and regulations of the governing bodies of local, county and/or state authorities that have jurisdiction. Should amendments to these bylaws be required by South Carolina state law, Chapter shall notify the National Association of said amendments but no further action will be required.

Section E: Sexual Harassment

The National Association of Residential Property Managers (NARPM) has adopted a zero-tolerance policy towards discrimination and all forms of unlawful harassment, including but not limited to sexual harassment. The zero-tolerance policy means that no form of unlawful discriminatory or harassing conduct by or towards any employee, member, vendor, or other person in our workplace and at our events/meetings will be tolerated.

NARPM is committed to enforcing its policy at all levels within the Association. Any officer, director, volunteer, member, or employee who engages in prohibited discrimination or harassment will be subject to discipline, up to and including immediate discharge from employment or dismissal from the association.

Reporting Without Fear of Retaliation: No Association member will be retaliated against for reporting harassment. This no-retaliation policy applies whether a good faith complaint of harassment is well founded or ultimately determined to be unfounded. No Association officer, director, volunteer, or member is authorized, or permitted, to retaliate or to take any adverse action whatsoever against anyone for reporting unlawful harassment, or for opposing any other discriminatory practice.

Section F: Dissolution

Should the membership vote by majority to dissolve the operations of the Charleston Chapter all remaining funds in the treasury will be sent to the National Association of Residential Property Managers.



Confirmation

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Your Form 990-N(e-Postcard) has been submitted to the IRS

- **Organization Name:** CHARLESTON CHAPTER OF THE NATIONAL ASSOCIATION OF RESIDENTIAL PROPERT
- **EIN:** 465768128
- **Tax Year:** 2022
- **Tax Year Start Date:** 01-01-2022
- **Tax Year End Date:** 12-31-2022
- **Submission ID:** 10065520230406130897
- **Filing Status Date:** 02-09-2023
- **Filing Status:** Accepted

MANAGE FORM 990-N SUBMISSIONS

NARPM CHS Budget 2023

Income:

Grants: \$500

Affiliate Dues: \$3,000

Oyster Roast Revenue: \$5,000

Gross Income: \$8,500

Expenses

Accounting Software: \$375.00

Chapter Website: \$1,2000

CC Processing Fees: \$90

Oyster Roast Expenses: \$8,118.48

Total Expenses: \$9,783.48

Net Operating Income: (\$1,283.48)

Oyster Roast already occurred. Above numbers are from our projections.

Steps to positive NOI:

- Exceed goal of 10 affiliates
- Host 1 NARPM in-person education course
- Host 2 non-NARPM education courses
- Receive NARPM member retention grant

NARPM Charleston Chapter

Profit and Loss

January - December 2022

	TOTAL
Income	
Investments	0.60
Interest-Savings, Short-term CD	4.49
Total Investments	5.09
National Support, Grants Income	720.00
Program Income	0.00
Affiliate Dues	250.00
Total Program Income	250.00
Services	140.00
Special Event	4,282.45
Total Income	\$5,397.54
GROSS PROFIT	\$5,397.54
Expenses	
Contract Services	0.00
Accounting Fees	361.44
Outside Contract Services	1,613.00
Total Contract Services	1,974.44
Operations	0.00
Meeting Meal Cost	236.50
Postage, Printing, Service	144.96
Total Operations	381.46
Special Events Expense	5,651.31
Total Expenses	\$8,007.21
NET OPERATING INCOME	\$ -2,609.67
NET INCOME	\$ -2,609.67

NARPM CHARLESTON CHAPTER
CHAPTER MEETING MINUTES
March 17, 2022

AT 9:00:AM, President Tony Brown called the meeting to order and mentioned the NARPM Anti-Trust Statement:

It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM's membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs) individual competitors or specific business transactions, or controlling or allocating markets. NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Introduction of Board Members

President - Tony Brown President Elect - Aaron Silverman Treasurer - Lindsey Blackburn Past President - Lindsey Blackburn Secretary - Shannon Rae Daugherty

Introduction of Speaker Victoria Coward Pet Screening

- *Petscreening is FREE
 - *Revenue enhancement system
 - *Creates a custom landing page for your company (with logo and cute pet pics), handles all things pets and animals.
 - *Does all leg work to verify all accommodation requests in this litigious society.
 - *Liability fence and gate around all things pets and animals.
 - *Renewals must be done
 - *NO pet profile is advantageous too to protect against liability. Cover what did you know, what should you have known and what could you have known.
 - *23 questions applicant/tenant must answer. (includes visiting pets) Sex, weight, age breed, vaccine info, spade/neutered, bite history, routine vet care etc.*
 - *algorithm churns and produces (pay \$20 initially \$10 annually and up) fido score
 - *No database for bites etc, except for what petscreening does
 - *Owner, tenant, PM and those that live around the pet are stake holders in how if a pet lives in the home.
 - *You can view ratio of cats vs dogs on dashboard
 - *Great digital passport for pet parents. Shareable profile. share with doggie daycares etc.
- Questions:** Metric for size? Smaller dogs more common to bite vs large. Victoria confirmed metric has gotten better.
- 82% of pets are coming in at 1-3 fido score

*Assistance animal review and verification- most companies are not comfortable with approving or not approving. Victoria helped apt association write tool kit for assistance animals. HUD notices outline what can and can't be done. Petscreening makes it easier on PM companies.

- *If a lawsuit ensues and you don't have good processes, PM and broker liability-includes
- *Victoria does educate all over usa to help people do their own screening
- **Cannot ask for paperwork on service animals-stopped 2020
- *HUD goal is that you are consistent but handle uniquely
- *HUD rules-you cannot use your own document to send to health care providers/must use

HUD docs

*Service verification is fast. Many times they say service but really support. Support can require docs from healthcare provider.

*Cannot give FIDO score to service/support, but verifies docs rec'd

Will push and pull info from provider and making sure using HUD language

?Can companies adjust the algorithm-yes whatever you prohibit (for example age, weight and breed)

Assistance animal authentication team found more fraud-372% in this category

Only 40% of reasonable accommodations requests meet hud guidelines and top 5 restricted breeds are typically those that are service/support.

Have 2 ways to earn income; no 1 paw fits all pricing. Can do by weight, can do multi tier pricing based on fido score. Charge more for riskier pets.

A variance in a small amount will increase your income. Flat vs fido risk pricing

Question-Short term rentals Airbnb allows for pet fees on support animals-except in certain areas. Have you seen this with Airbnb?. Crossing from housing to short term. We predicate on Fair Housing act. Chief legal counsel may want to navigate but Victoria thinks 2 different levels of legislation.

Under accessibility standards in aribnb. will get with her counsel.

*Can send a revenue worksheet to run numbers for you to see what you can generate and or increase income.

*Pivot income: holding non pet residents accountable for unauthorized pets.

*Petscreening sends follow ups regularly to applicants to ensure they complete process.

*Vaccine records are very important. System lets you know when vacs expired.

Question: When pet dies pet fee-non refundable. don't recommend refunding a fee especially as most owners will get another pet. Petscreening sends condolence card if pet dies

She would stop pet fees.

*Pets in homes 70% across usa average and children in homes 27-28%

*Survey 1 year into covid, 26% got pets called Covid cuddling

post pandemic admit to 4-10 mental health issue admission

national apt assoc did survey 40% of respondents had problems performing duties associate with job due to emotional health struggles 12% took a week off

Covid cuddling appears to be a result of these challenges and an Increase in pets

Contact Info:Victoria Cowart, CPM

victoria@petscreening.com

704-951-7360

Treasurer Financial Report:

- Bank Balance \$4246.65 + deposit of \$140.
- Eventbrite ticket sales were 145 tickets for a gross sales of \$1450 but after \$317.55 service fee net deposit was \$1132.45.
- For February The gross income was \$2883.07 and expenses were \$4,948.99

Oyster Roast grant closed out

Take cards to Broker/Owner for next year March 17-19 2023

Talk up now to get more attendees

Friday happy hour and Saturday morning run

Memberships:

- Tony goal-increase membership 20 for year
- Encourage to educate and get members

Will Riley CEO CTAR 1st time back welcome. Thank you! Happy to have meetings here.

Adjourned meeting at 9:54AM

Round table: Eric Wetherington speaker July 21st (Shannon to remind) SDRP

Onsite Pros May

Nov installation of officers. ask DeeDee to come in find location luncheon

Sept:ask round table talk about covid changes in biz. unique ways to make more money. any vendor 10 mins to talk before or after;

NEED LIST OF RESPONSIBILITIES

new inquiries to Shannon and Tony

follow up with Renata

Discuss next meeting classes virtual option to save money

May share ideas broker owner



Shannon Daugherty <sdaugherty@purepm.co>

NARPM Chapter Meeting

1 message

Shannon Daugherty <shannon.daugherty@newheightspm.com>

Thu, May 19, 2022 at 10:05 AM

To: Shannon Daugherty <shannon.daugherty@newheightspm.com>

May 19th, 2022

CHAPTER Meeting:

Tony call to order 9:01

Minutes: Hold as we don't have

finan

4155.66 balance .75 interest

720.00 national maintaining chapter will be deposited this week

Another grant should be coming for oyster roast \$500 approx

old biz;

souther state June 22-24 Greenville sign up

New biz:

Round table hiring va's onsite pros was supposed to come

Warren Sloane: Most of us have them in group. Call RA's internally. Haave had 3 years. Started w Annequim. Used to procure first 2. Helped with letting go and finding new. They had some phililosomal differences and are hiring own.

Designated one as mgr for area. Mexico. That person was in charge of putting out ads for new ones. Has 4. Do diff tasks Apps, Renewals, new one answers phones, AR/higher level mgt person.

Bringing on keep simple. Pidgeon hole into one task. Tend to turn fire hose on and set them free. Hire as need so as we have need, figure it out employee. With RAs we really try to ensure they are focused on singular task. Lorena their VA started with answering one question, then she asked for more work. That is benefit the we add on. Everything is different for them so when translating you have to explain maintenance toilets, etc.

Pushback when first brought in, current staff feels threatened. Warran sauys what do you haate to local staff. That is what they give ra to make the home base staff invested in that RA. Great experience with RA's...same issues hiring and firing as local. If current RA suggests a lead, they still interview and possibly bring them on even if needed. Less expensive to hire Va. Craigs, facebook and personal reccomendations. Brought on 18 year old, high school from home, and work during day. So far probaby best employee they have had. Budget allows for us to try them. How to pay: Use transferwise/now wise.com allows to send omeny to employees. Not allpayment systems will go to Mexico or Phillipiens. Warren didn't like Phillipiens as an option due to time difference. Could do overnight work, but wasn't the right fit for him. Wise pays mexico but not philipeans.

we don't do tax stuff because we can't 1099. with annequim it was covered and built in. independ contractors for warren.

Linsey has 1 va through annequim. If she had need for more she would explore employing directly. Her va seems happy.

May pull as direct employee. haven't had to talk to anyone in annequim in 2.5 years. 1 year review. he answers

pjhones and distrib messages and process apps. Keep simple 75% calls are for showings or ? about apps

Tony? apps in grey area, how do they determine? He does not approve, he collects all info then goes to PM. Paystubs, dl, calculate income. Send out rental reference. Threshold on credit score we don't ask for rental reference. Spreadsheet fills out.

Warren uses a matrix on website. Plug in all data and matrix says what to do.

Aaron: No va yet. He automates. Clicks buttons to make things have. In a rock and hard place on hiring VA as it is so automated.

Warren massive APTly transition. Still findig need to manage it. Make sure human touch with automation. Not fully onboard and aptly is doing it all. Massibly complex. Constantly working on Atply Phone calls were the biggest thing we wanted someone else doing. Dispruts in house staff.

Nicole-maintenance coordination. Our VA at NHPM would dispatch, contact tenants, help with scheduling. Biggest. Aaron also has maint company, so he feels he needs that control. Nicole spoke of how we trained her. Making calls to tenants.

Warren maint coordination will be next for him. To send invoice, check work,

Aaron-takes most of his time.

Renata-first hire for VA was nightmare. He was from Mexico. Follow up to ensure done. Gave too much. No procedure to follow. No follow up. Revamped and created processes and took in house. Has 2 va's one marketing 1 lease renewal inspections. Once we get them comfortable give more tasks. Low to mid income client base, don't understand how to do online, want to call and talk to someone. Best to keep in house. Just hired answering service to answer phones. Has been a Holly Receptionists has helped greatly. Answer marketing questions.

Aaron-what phone system Ring central most, Biz Vox.....Lindsey uses local IT company had Ring switched to Found had problems dropping calls etc. Only compatible with iPhones from what they found. Aaron uses Line 2. Seems to work okay. Nicole-mentioned call recording to reference conversation. More features and more consistent. We have a lot of trouble with Ringcentral. Connected to wifi okay. NHPM troubles. Aaron loves Line 2. Geared to small biz.

Warren-mentioned training of va's. Maintenance is a huge task. Started small with training. Admin, then pass to staff member. Once that is down, then teach them about say inspections. Show them what to look for. Translate into actionable work orders. Much slower than US training, fire hose training isn't good either. Don't pour everything on them. One small task. Answer phones and take messages. Then start with how to answer.

Shannon-Training is so key to start with small bits. It takes longer at the start but worth it in the end.

Tony-How are you using for inspections? They send info, arrange appointments, or set appt for PM's. If Zinspector, upload info. Admin side first. For example inspect found dog, VA can look at lease and see if dog on lease.

Shannon-Other companies? One starting in Texas Hire Smart Virtual Employees. Bess) Partnered with company in Philippines partnered with 5 star. They use Hire smart-have 2 remote teams. They work our hours.

Warren=Mexico is 1 hour behind.

Bess have you found any RA's burnt out working overnight. Bess-no but family health issues to take time away, live multi generationally and needs to take time.

Other is a matin coordin has worked 20 years in night shift.

Renata-has overnight employees too.

Phillipians it is a big thing to work virtually around world

Hiring if you go to clist-(warren) english job descrp. to ensure they can speak english. Can we understand you, intent strong and quite place to work.

Lindsey-how do you feel about accent...she had hard time, goes both ways. They need to be able to understand us too.

Sloane-coming to Southern States VA. ALI 4 of his va's got together.

Tony-transition of Aaron Domestic Violence

Most have had domestic violence glaring hole in SC legal. Nothing you can do. Can't let victim out of lease. Remaining tenant can sue for rest of lease. Judge must agree to go after abuser as two on lease.

Pro Marvin Mindarvis asked for aaron to propose agreement. Went to Atlanta chapter suggested looked at VA bill.

Not terminating lease. Victim of lease terminates respon to lease

Male and female-female can vate and terminate her obligations. Then can go after remaining person.

3 female-1 gets raped, she can vacate others can stay. Without causing victim to be victim twice.

When children involved, wife will stay and get beat to ensure they have a place to live. We need to provide ability to do the right thing without exposing us legally. Right now we have no rights unless both parties agree.

There was a previous bill in 2019 prosed. Looking for feedback. Sent to Pendarvis and he liked it. Aaron would like to give him something new so in the fall he can resubmit.

Email or call him.

Literally copied from VA bill. What will be proof to be used? Aaron doesn't know and needs legal. Open to changing based on suggestions.

Warren-incidents at house or any incident? Aaron-someone on lease. Stalking for example. 3 roommates, 1 needs to leave. 2 can stay and get new roommate. Questions posed what if 2 remaining don't want to find a new roommate and can't afford. Aaron goal is to protect victim. Tony as PM we still have to collect rent.

Warren-we can adjust our companies to follow laws. There had been a law NAA supported with expedited eviction. Aaron-problem is evicting victim as well. Judge could separate that person out. Contact Victoria petscreening. Ask her about expedited eviction to see what verbiage is.

Shannon-could it follow military clause? How do you write that.

Lindsey: we are the best group to come up with this verbiage. Aaron-problem hus/wife boyf/gfired those are the ones dying. Aaron has been fortunate male has left. None of his domestic violence have ended in death. He has had police reports, restraining orders,

We can't enforce restraining orders. Police came after key change for woman on lease. They made her allow him entry to property because he got mail there, she wouldn't press charges, he had personal possessions there.

Warren- Aaron what happens if one wants to stay and wants assistant to leave. If you are fearful for life don't stay.

Tenants can evict roommates.

Tony-wife and spouse altercation. Wife is leaving fears for life. She leaves. Couple hours he comes and gets some of his stuff and leaves. More than \$400 in house and items left. Neither is answering. Now Tony has to go through full eviction process. Bill wouldn't cover that as we need 3rd party documentation of what happened.

Aaron felt he made mistake in letting politicians figure it out. Let them hash out and propose. Aaron agrees with Warren that time frame is very long.

Could we have a chapter meeting on this topic to pull more people in? We have time caution to get into too far into as we can't cover anything. Start with male/female situations first. SC is very high with domestic violence situations. Aaron wants to solve that first.

we will send something out to chapter. Summarize: concern terminology

how to determine when can be removed

what is 3rd party notification

time frame

what protections/rights do others have that are on lease?

start with occupants on lease and focus on those situations. All agree.

Roommate release process-some are not agreeable, but most times works as outlined. What happens when leftover tenants are impacted unfairly. Abuser 3rd party not involved, can all terminate lease. Aaron wants to make it as broad as possible.

Aaron to send a list of topics

Bess-good conversation. She has to run. National update: Chapter leader training June 9th 3 eastern FREE

Chapter excellence June 1st due

Tony RVP June 15th Chapter leader call

21st Greenville classes no enrollment

Legislative conference reminder

Do any of you in chapter leadership need guidance from national? No questions now but Tony will email.

Do you need volunteers for Southern States? Renata asked...she will check and get back with her.

Tony-1 new member. Howard with Mold Solutions Absolute Disaster Services

we do disaster recovery and mold remediation

storm driven, plumbing, pan overflow, sweaty boots, disaster relief

Real estate inspectors find mold, offers 10 year transferable warranty So if property goes to sale you can transfer this warranty.

They also do air quality testing

Nicole Ivey first in person

Adjourning 10:04 am

Respectfully,

Shannon Rae Daugherty

Operations Manager

New Heights Property Management

237 Old Summerville Rd Suite F

Summerville, SC 29486

(843) 419-7238

shannon.daugherty@newheightspm.com

Office Hours: Monday - Friday 9:00am - 5:00pm

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NARPM CHARLESTON CHAPTER
CHAPTER MEETING MINUTES
July 21,2022

AT 9:01:AM, President Tony Brown called the meeting to order

NARPM Anti-Trust Statement:

It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM's membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs) individual competitors or specific business transactions, or controlling or allocating markets. NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Board Members in Attendance

President - Tony Brown

Treasurer - Lindsey Blackburn

Secretary - Shannon Rae Daugherty

Minutes from Previous Meeting

Reading of minutes by Shannon Rae Daugherty

Minutes approved

Treasurer Financial Report by Lindsey Blackburn:

- Bank Balance as of June 30th, 2022 \$5213.15. Includes deposit of \$. 38 interest, \$250 for affiliate membership and \$720 from NARPM.
- There is no anticipated income or expense at this time.

Treasury report approved

Legislative Report by Warren Sloan

- Nothing to report at this time.

New Business

OnSight PROS special guest presentation: Phil Owen, CEO and Megan Brooks, Sales Director

What kind of things do you hope to leave this meeting with today?

*Understanding better use of periodic assessments that interfere with tenant schedules.

*What are things I am not thinking about?

*How to get more information from tenants.

*Knowing what to look for and when.

Feel free to make this a conversation.

*3rd party company-sends people out on pm behalf for evals,

move in move out reports

- *13 years experience learning about best practices for PM's

- *Not currently in Charleston market-trying to work on it

- *Megan Brooks Sales Director

- *Goal today is to take 13 years and give you knowledge. How to maintain prop awareness on behalf of owners to reduce risk and liability. To maintain assets.

- *We call it Profitable Property Awareness

- *One of the top 5 of what you hate about PM -going to field. But, it is really important and crucial.

- *Onsight PROS used an advisory board of people across US to come up with a general consensus of what was needed. From that mind trust, developed this rhythm.

- *Some PM's look at evals as what I need to do and I need to do it for free. We challenge that narrative and want to teach you how to be profitable.

- *Framework the rhythm:

- *Goal to start at Move in. Fully document condition. We recommend no overview and issues only photos.. Photo documentation of every sq ft of property. They take photos of all the walls/ceilings/cabinets in out/drawers etc. Goal is to show the condition when the tenant moves in. When tenant moves out, you can now demonstrate condition. Take pics in and out of appliances and serial numbers. Helps with maintenance. Before you dispatch handyman, you can go look at this info and order part to save owner money. Possibly no trip to property needed on front side.

- *One resource is 360 cam. There are Ricoh THETA 360's for about \$300. Photos are grainy but tell a story. Saves time. Also catches things you didn't mean to catch!

- *How do you get evals paid for? OnSight calculates 1hr per sq ft. Time is money. Charge owner for service and guarantee security deposit coverage if disputed.(Sec Dep Guarantee Program). Most clients charge tenants by using an Admin Fee. (Move in tenant pays SD, admin fee and 1st month rent as example.)

- *Tenant Checklist-some markets require a checklist for move in by law. Enforce tenant walkthrough photos to digitize the checklist. Many apps for this (Zinspector). 3-7 days after moving in max. Short time to doc move in and not days later. So much can happen when moving in as far as damages. Tenants tend to only document issues and not how property actually looks. Add a section in lease stating photos are for documentation as it pertains to sec dep review only. So it doesn't become a maint request list.

- *How to get this paid for and not absorbed by PM company? Recommend Resident Benefit Package-get app like Zinspector/Happy Inspect as they all have photo ability. Build into the package- we provide this tool for your protection. Citizen Home Solutions utility set up for tenants. Paid for by the utility provider and you get a portion of the proceeds. That would cover the price of the app you use!

- *Periodic Assessment/Lease renewal: periodic during course of lease. Lease renewal end of lease to determine if the tenant is worthy of renewal. Same scope but different times.

- *Periodic: Do this (recommended by advisory board) 3 months into the lease. See if there are pets/occupancy/smoking issues whatever case may be- find early to address issues. Purpose 3 things 1-tenant is doing what supposed to do per lease(mowing/change filter) 2-make sure they are not doing things not supposed to do pets/occupancy/installing things they shouldn't- pool. 3-discover unreported maintenance or safety issues. Brown spot ceiling water ingress. If you wait until month 6 or lease renewal it is of much greater cost to owner.

- Check filter and initial and date that filter. You will know it hasn't been changed if you go back and the same filter is still there. Smoke alarms-carry smoke check. Pushing the button on the battery and horn ONLY. Smoke in a can creates a simulated smoke emergency. You know the alarm works! Pull smoke alarm down and look at the manufacturing date. Federal government requires alarms sold in the US must have a

manufacture date. If more than 10 years old, alarm is expired and PM hold legal liability if not changed. If expired massive liability. We recommend photo documentation. On site photo documents alarms every time. Run water through sinks. Feel pipe underneath for moisture. Look for pet evidence. OnSight trains their techs to look for beds, toys, scratches on doors, hair, pet bowls, pet poo, photos, etc.

*How to NOT pay for periodic- Owner: mgmt agreement notate cost to provide period photo reports. Owner covers cost. Many PM's are terrified to implement cost, but many do it and there are no issues/complaints. One owner that had 500 doors, implemented this change and had 3 calls from owners. 1 was to thank, 2 to complain. Charge a tenant- Pet inspection Fee: national average is 72.3% of tenants have pets per petscreening. Most clients of OnSight charge pet deposit or pet fee. If a tenant wants a pet, enforce in lease that tenants submit to every 6 month pet insp at their expense. This allows for periodic reports to be paid for by tenants. Great for owners that don't want pets. If 72.3% have pets, that only leaves 22% of tenants looking for no pets property.

*Tenant Self Evaluations: Not getting a professional eye on property is a crime, not fulfilling fiduciary duty to clients. There is a place for tenant self evaluations. Move in and renew.

*Don't use term inspection as it confuses real estate transactions. Say assessment or evaluation.

*If you require a tenant to do something that takes them a great deal of time, they won't do it. Brevity is key. Tenants won't do more than needed and won't give details they don't want you to know. Tenants' self evaluations should not be substituted for you viewing the property. Goal with self eval is to note the things they are supposed to be doing. Mowing, changing filter, pic of all smoke alarms and they work. Pay for with a resident benefit package. Let tenant know, if you don't do this, we will send someone and we will charge you.

*Lease Renewal Eval: end of lease, 90 days (whatever it is) notice of intent to renew or give notice. At that point, the decision tree. Some clients do a pre move out eval. Document condition to let tenants know what they need to take care of or will be charged. Renewal: if worthy of renewal, how to pay for this expense? Charge owner lease renewal fee to pay for yourself or 3rd party to do lease renewal report. Don't call the inspection fee. Call lease renewal fee. OR charge tenant lease renewal fee. How do you decide who to charge? Charge both. He recommends this due to all the work required at renewal. Since inventory is low, tenants will pay it because options are limited. Market demands allow PM's to cover costs in this manner. If the market changes, you can increase the fee easily instead of now charging for something that was always free.

*Move Out Report-same scope of work as move in. Document everything. Sec dep disputes should go away if you document everything. If you have an admin fee that doesn't cover move in and move out expenses, charge a coordination fee. Any maintenance coordination for work that tenant didn't do pursuant to lease, tenant will be charged a fee in addition to invoice for work.

*Ancillary Services: smoke alarms-test and doesn't work, charge for install to replace. Carbon Monoxide alarms-replace and charge for replacement. Suggestion-install on ceiling or wall as they don't tend to get taken as often by tenants. Air filters-charge for replacement. Make it a hefty charge as the tenant was supposed to be changing it. Damage to hvac system and tenants don't mind having someone come out to change it for them at a low cost. Charge for HVAC service to check the system. Goal is to change the behavior of tenants by charging them. Door stops/wall protectors-carry some with you. Install at move out eval and cover damage that is present and keeps holes becoming larger. Tenant charge-if well documented.

-PM mentioned she doesn't provide owners with eval photos due to owners discriminating based on what is in pictures. If something of concern, she send pics. Does anyone provide owners full reports? Oak Trust does, but thinks may change due to issues. Sloan sends full report. OnSight avoids taking photos of personal items. If family photos on fridge, they don't take that pic. Remind owner, you are so lucky you have me! I am about to save you money on a lawsuit.(educating your owner on what they can and can't do/say) Turn lessons into value as we know law.

-Pet restrictions breed or size - anyone having issues? Natalia at Family Owned mentioned during onboarding owner required to give insurance binder-if exclusions PM company knows. Had a client that lost their insurance coverage due to a pet. Natalia has 7 houses with restrictions in her portfolio.

-How many send a move in report to tenants? Most post in the portal, send at the end of lease....OnSight recommends, send to the tenant. Show them we know what the condition of the property is as it is documented. Makes difference showing they are accountable.

-OnSight in 23 markets across country. We need 1500 doors in CHS to open this market. How many tech's will you have in market if you open in CHS? 1500 doors start with 2.5 inspectors. If we have 100 move outs collectively, we schedule way in advance to ensure we have manpower.. Move in evals take the least time, give us 2 biz days to turn around as we can get it done. Market will grow and they will add people. Eval completed, tech syncs and goes on your portal. PDF and invoice next morning.

-What kind of background do evaluators have? All across the board; PM or real estate, construction, hvac, cable tv, but must be tech competent to use app. We teach what we want them to know. You describe- you don't prescribe. Home inspectors prescribe work.

CTAR and MLS President, Realtor® Corwyn Melette

1st meeting he has attended. Thanks for allowing him to participate. This is how we serve, give back, keep doing it!

1st time visitors:

TGI Property Mgmt Tandra Jones (brought by Renata)

Jasmine Melette -Corwyn is her father new to PM

Taylor Cooper PURE and NHPM(brought by Shannon)

Jackie Dodd-NHPM

Emma Wetherington - NHPM

Next meeting elections and Speaker Eric Wetherington, Renters Insurance Solutions
Speaking about Security Deposit Alternatives.

Tony adjourned meeting at 10:35 am

NARPM CHARLESTON CHAPTER
CHAPTER MEETING MINUTES
September 15, 2022

AT 9:05:AM, President Tony Brown called the meeting to order

NARPM Anti-Trust Statement:

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Board Members in Attendance

President - Tony Brown

President Elect - Aaron Silverman

Treasurer - Lindsey Blackburn

Secretary - Shannon Rae Daugherty

Minutes from Previous Meeting

Minutes provided by Shannon Rae Daugherty

Minutes approved

Treasurer Financial Report by Lindsey Blackburn:

- \$5213.15 Bank Balance as of September 15 , 2022. Includes deposit of \$. 44 interest.
- There is no anticipated income or expense at this time unless we get grants.

Treasury report approved

Legislative Report by Warren Sloan

- Bill for rental registrations ordinance with the city of Charleston is on hiatus for now. Ordinance would create a rental registry that would help the city connect with landlords to more easily resolve issues at their properties. There is still no solid information and we can't answer questions since officials are looking to revise the ordinance. It is worth mentioning to clients to have a discussion that something is on the horizon. Once a new bill is presented, you will definitely want to bring it up to your owners/investors. Registration systems have been in works for decades. Who is responsible for tenants actions at property? These ordinances include multi family and aren't necessarily thoughtful of single family investors that have a small multi unit or single family rental investment. (same rules would apply to all types of units) Inspections are done, and violations submitted. So for example, a 12 unit bldg, could get 12 violations at one time. A violation of this sort would have a penalty of 2 years of inability to rent the property. The may model like Columbia, SC. When Warren asked if

he thinks they could come up with something similar to what is done for short term rentals, he said it has been proposed but no one thinks it will go that far. The Board of Realtors is trying to reaffirm the meaning of short term rentals.

New Business

Special guest presentation: Eric Wetherington Renters Insurance Solutions

Eric mentioned he went to the Build to Rent conference recently-huge uptick in build to rent in the single family space.

Renters Insurance Solutions offers insurance for PManagement.

How can moving into a property be more affordable when average rent is \$1937 nationally? It can cost a tenant \$4-6K to move in (utility set up fees/deposits, security deposits, moving costs etc)

Honestly, most people don't have \$1000 cash in hand let alone money to afford to move.

In the US, there are \$45 billion dollars in security deposits in escrow accounts sitting in banks doing no good for the tenants (can't be used) by anyone including the PM.

There is a liability for escrow accounts. Eric mentioned sitting in on 6 court cases as appointed receiver where a PM company had problems with escrow accounts-the money was gone!

SD alternatives are a solution to make it more affordable for the tenant to move.

Nearly one-third of the United States has either passed or supports new laws for security deposit replacement alternatives. These new laws are pushing what is being commonly called "Renters Choice" alternatives to the standard security deposit programs. Atlanta, Cincinnati and Baltimore have already passed legislation and it is expected that more cities will follow.

The industry saw this as an opportunity to offer renters a choice. (standard security deposit or an alternative)

Allows pm to offer monthly fee instead of security deposit to attract more renters and eliminate costly time of deposit returns.

60+% of renters if offered a choice, are choosing the alternative option to a standard deposit

It suits all economic situations. Tenants paying \$1200 a month or \$3000 a month are using it.

Renters are still approved by pm-some of the companies offering the replacement options want to look at applicants in order to approve them for the replacement offering.

Renters Insurance Solutions does a review of your company's application history and comes up with the monthly premium based on company rating. (looks at security deposit return history etc) They do not review the applications before approval.

The renter is offered to pay a monthly fee in lieu of a standard deposit at move in.

PM's software platform for its residents (Propertyware, AppFolio etc) sends weekly reports to enroll and cancel those with coverage/without.

Claims: With a standard security deposit, we have 30 days to return a security deposit. With an alternative product, you have "insurance" amount to work with for coverage of damages at move out. PM would send a demand for payment letter of any balance due(to tenant) with move out report and give them 5-7 days to pay. If no payment is received, PM submits a claim to insurance and in 48-72 hours a check is mailed out to PM for the claim amount. That money is called insurance proceeds. With SD funds we cannot send to the owner as we have to prove repairs. You can send money to the owner with a replacement program. If the owner doesn't want to do repairs, they can take the funds. These programs help to eliminate the need for the PM to get a security deposit account and they don't have liability for accounting for all damages/invoices in 30 days. With replacement programs, it is not a deposit. After money is paid to PM, Renters Insurance Solutions will try to collect that money back from the tenant. Therefore the PM doesn't have to worry about collections efforts.

Benefits: Less money to move in, simpler process, auto approval (no outside approval), owner-properties rent faster as there is a larger pool of applicants, insurance policy in place to help owners cover damage charges, and you can increase deposit to get more coverage. For example 1.5 deposits in lieu of 1 month. PM benefit-easier move in, seamless collection of premiums, no liability of money in escrow, and you can charge up to \$5 in admin fees that stays as ancillary income; you share in profits! Profits-RIS has created the program to be a part of a captive insurance company to share in profits with the PM company. RIS benefits-compliant at state/fed level, owners have more protection, and a simple program to offer.

Other offerings by Renters Insurance Solutions: can do full H04(renter with expensive contents) and tenant legal liability. With offering these policies, PM's aren't having to collect insurance docs. All are held for the PM. Don't forget to be sure you are being listed as an interested party on insurance!

Points to remember:

H04-be sure to understand the difference in coverages vs legal liability.

Unless PM has PNC license, they cannot explain insurance or sell it!!

*Questions:/Feedback

?s tenant pays pm company directly, when tenants stop paying what happens? The PM company is still paying for coverage. Once evicted for non payment, you may be able to file a claim for those fees incurred as well as rent.

? can you charge up to a \$5 admin fee? Yes. If you offer renters insurance too, an additional \$2 admin fee can be charged. Profit sharing of premiums is after a year and the payout for shares equates to quarterly profits.

? what is fee per month for this program? Varies on how a company is rated A-E and then how much coverage you want the tenant to have. The premium is based on rental rate and credit worthiness.

?there are 5 insurance companies pulling out of SC-what is the likelihood of renters insurance company leaving? Many companies leave due to claims history being so bad, putting them out of business. The claims on these products aren't bad. Renters Insurance Solutions puts 20% of premium aside for claims on this product. Not a bad risk rate. Many companies claim experience is so high, insurance companies are folding. Making sure you work with someone admitted in the state. Admitted product means insurance company filed all forms biz plan models filed and accepted by state. Surplus lines - popular companies not admitted so risk is higher. Make sure you work with an insurance company that is reputable! Company that is admitted in a state, state steps in if the company goes out of biz.

?How is a PM company rated as it pertains to the premiums charged for this program?

Renters Insurance Solutions looks at the last 2-30 sd dispos. They check for all photos, etc. They look at what you are giving back and what you are charging. They tries to help generate profits for premium shares. For example, if you automatically take \$250 for cleaning and tell the tenant not to clean, it hurts your profits in the program. RIS will help you evaluate those types of things.

1st time visitors:

Chris Turner Turner Properties Pure

Amanda Smart-NHPM Pure

Anna Cogdill-NHPM Pure

Lance Hemmacker-Happy Homes Lead PM

Next meeting elections at remote location to follow

Nominees for chapter nominations:

We encourage all attendees to be on a committee. Lindsey will send out via email so all can learn what options are available.

Aaron Silverman President
Shannon Rae Daugherty President Elect
Janet Field Treasurer
Nataliya Matejka Secretary

Annual NARPM convention in Las Vegas 17-20th of October 2022
Womens' Conference is on that Friday

Tony adjourned meeting at 10:35 am

NARPM CHARLESTON CHAPTER
BOARD MEETING MINUTES
March 10, 2022

AT 2:04 PM, President Tony Brown called the meeting to order and mentioned the NARPM Anti-Trust Statement:

It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM's membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs) individual competitors or specific business transactions, or controlling or allocating markets. NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Present Board Members

President - Tony Brown President Elect - Aaron Silverman Treasurer - Lindsey Blackburn Past President - Lindsey Blackburn Secretary - Shannon Rae Daugherty

Oyster Roast recap and ideas for next year.

- *Different ticket price (walk ups being more expensive) to help with food ordering numbers.
- *Possible cut off ticket sales at a certain time/date at a set price. (Wednesday cutoff)
- *Eventbrite-it was open to public. Requires end time on invite.
- *More national people come every year
- *Suggest portalets and washing area outside (enclosed trailer)
- *Liability for chapter in serving alcohol? Good questions for national(event insurance that we could tie into). NEED FOLLOW UP
- *Hire bartender that watches how much people order
- *Arm bands at check in. 96 people checked in, however people at event reported larger numbers. Multiple tickets didn't get used as no shows.
- *Shifts more defined
- *Music, food change suggested as menu was almost the same. Chilli bar is good if cold out.
- *Garage ran to get more beer when we ran out. We provided a large tip.
- *Oysters-used 21 of 25 bags ordered
- *Time-started at 4pm. General consensus likes early. People leave when it's dark. 4-9 change to 4-8. Band, food, oysters were to be ready at 4:30. Suggestion-band start at 4 and 4:30 oysters. Normal to serve oysters at roast first. Regular food causes roast to fizzle as people want to eat.
- *Date: Sewe always weekend after superbowl. Restricts hotels. People at event had to stay Ashley Phosphate area. Worked well on 3 day weekend. Many vendors out of town. No to superbowl weekend. 3 day weekends work best for traveling- run risk local people leaving. Plan and market earlier. Print a save the date to take to convention. Cards through vista print. Warren Sloan to order cards for roast estimate \$35.00 FOLLOW UP
- *Feb 18 would be the 2023 event APPROVED
- *Room block plan early-Warren will check how many were used FOLLOW UP

Happy Hour hosted by Second Nature- good attendance. Continue with a sponsor to host the event on Friday. If no major sponsor-chapter hosts.

- *Possible Open Bar with drinks or signature drink sponsorship for the drink

Run not well attended, but group liked that it happened. PM health has a good presence within NARPM to encourage this event. If we could get Peter Hernandez to come it would help.

Lindsey reported \$140 deposit from donations.

Chapter spent \$1300 Oyster Roast-need receipts(Lindsey has and will close out)

Tony to close out grant. Lindsey to forward receipts for catering.

Minutes from last meeting. (December) Read/approve next month.

Treasurer Financial Report:

- Bank Balance \$4246.65 + deposit of \$140.
- Eventbrite ticket sales were 145 tickets for a gross sales of \$1450 but after \$317.55 service fee net deposit was \$1132.45.
- For February The gross income was \$2883.07 and expenses were \$4,948.99

Motion to approve financial report. Approve as read. Warren Sloan approved Renata Smalls second.

Memberships:

- 1 new from Oyster from Columbia.
- Tony goal-increase membership 20 for year

Chapter Meeting: Pet Screening for March 17-in person at CTAR at 9am. Renata to email Onsite Pros Megan Brooks (to attend/speak) sponsored oyster roast affiliate membership. Affiliates should be added as members. Let them know who can speak at meetings. Aaron will follow up with sponsors of roast to let them know they are affiliates. Lindsey will add to website. FOLLOW UP

- still need to look at July, Sept and November topics. FOLLOW UP
- site/facebook-Tony has permissions to make changes. Lindsey will post oyster roast pics, and something about meeting 3/17

New Business: Sponsor national class? Done in past but limited luck. 5 people in attendance. 1st one Risk Mgmt had 20. Most recent ones 5-6 people. In person or virtual? Limited effort on virtual. FOLLOW UP

Tony Brown made motion to adjourn, and Warren Sloane seconded the motion.

Adjourned meeting at 2:43 PM

Next Board Meeting: Thursday April 21st at 2 PM

Next Chapter Meeting: Thursday March 17th at 9am

NARPM CHARLESTON CHAPTER
BOARD MEETING MINUTES
April 17, 2022

AT 2:07 PM, President Tony Brown called the meeting to order and mentioned the NARPM Anti-Trust Statement:

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Present Board Members

President - Tony Brown President Elect - Aaron Silverman Treasurer - Lindsey Blackburn

Past President - Lindsey Blackburn Secretary - Shannon Rae Daugherty

Sarah Turocy, Warren Sloane

Minutes from last meeting. Approved Lindsey Blackburn, 2nd Sarah Turocy

Treasurer Financial Report:

- Bank Balance \$4242.37 (.37 interest)
- From last month \$239.62 Debits/\$140 deposit Eventbrite ticket sales (save the date cards for next years Oyster Roast were \$144.96)

Committee Update: Renata and Kristina not present-will get update next month

Legislative Update: Warren Sloane

- SCR Requests states Supreme Court on CARES Act Document to revisit requirement of form.
- Short term rental law-possible lawsuit residential/commercial to outlaw restrictions. Need a face from property management other than SCR to stand up for cause. Denise Swift has been active with short term rentals. May want to reach out to her.

Old Business: Sponsor national class(virtual)? Board may give CE credit. Chapter Compliance- Lindsey Blackburn has completed. (has done 8 times) Tony to close out \$500 grant for Oyster Roast.

New Business: Who is attending PM national conference?

Tony Brown made motion to adjourn, and Warren Sloane seconded the motion. Adjourned meeting at 2:20 PM

**NARPM CHARLESTON CHAPTER
BOARD MEETING MINUTES
October 13, 2022**

AT 2:09:PM, President Tony Brown called the meeting to order

NARPM Anti-Trust Statement:

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Board Members in Attendance

President - Tony Brown

President Elect - Aaron Silverman

Secretary - Shannon Rae Daugherty

Future Treasurer - Janet Fields

Minutes from Previous Meeting

Minutes provided by Shannon Rae Daugherty

Minutes approved

Treasurer Financial Report by Lindsey Blackburn:

- need to get from Lindsey

Membership Report by Renata Stinson: membership will get follow up upon her return

Legislative Report by Warren Sloan: report received at last chapter meeting

New Business:

*Aaron-Started chapter content management. Should have more info for the next meeting.

*Next CHS Chapter Meeting Nov 17th, 2022 - presenting Mold Solutions. Will be a social event. Tony will get something out to board members to talk about hosting at Baker and Brewer. Tony will see if Mold Solutions will cover part of the expense. Aaron will connect with Brewer and Baker to get space. Shannon to send invite once she hears back about location.

*Website-don't worry about right now due to content management software implementation.

- *Chapter nominations-Shannon to send email to Lindsey to make sure email goes out asap.
- *Aaron-change to bylaws, will email to Tony within the week.
- *Tony-will call national to find out about event insurance for oyster roast within week.
- *Elections-when we come together in November this will be swearing in. Shannon to ask Eric if he will do this for us. November 17, 2022.
- *No meeting December 2022.
- *December 1, 2022 grant apps close - submitting for membership and social event, Tony will take care of those.
- *December 8th, 2022 chapter leadership training 3pm - on website to enroll
- *Aaron: Domestic violence bill has gone nowhere. He did speak with My Sisters House, they have a need to work with PM's to refer women to that are looking to get reestablished. The organization will help with monthly rent as they transition out of domestic violence situations. Women still go through the app process, organization will pay 6 months rent until she gets back on her feet. They can come to a meeting to talk about the program. SC has a huge need for this type of help in domestic violence cases. Aaron will invite contact to the next meeting.
- *NARPM annual convention-Tony and Aaron are going and will be present at chapter president meet up on 10/20/22
- *Next meeting swearing in:
Aaron Silverman President
Shannon Rae Daugherty President Elect
Janet Field Treasurer
Nataliya Matejka Secretary

Tony adjourned meeting at 2:22pm

**NARPM CHARLESTON CHAPTER
BOARD MEETING MINUTES
November 10, 2022**

AT 2:00:PM, President Tony Brown called the meeting to order

NARPM Anti-Trust Statement:

It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM's membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs) individual competitors or specific business transactions, or controlling or allocating markets. NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Board Members in Attendance

President - Tony Brown

President Elect - Aaron Silverman

Secretary - Shannon Rae Daugherty

Lindsey Blackburn - Treasurer

Future Treasurer - Janet Fields

Renata Stinson

Minutes from Previous Meeting

Minutes provided by Shannon Rae Daugherty via email

Minutes to be approved 11/17/22

Treasurer Financial Report by Lindsey Blackburn:

- Lindsey reported nothing new to account other than \$.05 interest approximately

Membership Report by Renata Stinson: Renata will email the membership list to Aaron so that he can add to new software. Kristen was actually the Membership Chair-Renata was the helper. Tony will send the active vendor list.

Legislative Report by Warren Sloan: Will have a report next meeting.

New Business:

*Aaron-Attended planning meeting for chapters at National. Mentioned chapter leadership training coming up on 11/16/22 if anyone wants to attend. Domestic Violence Bill: Meeting with two reps next week in hopes to have a bi partisan bill.

*Tony-someone reached out from Florence, SC. They weren't in any chapter. Will need to contact National to join 1st, then they can join our chapter. Tony will reach out to them to let

them know this information.

*Next meeting swearing in at Butcher & Baker: Aaron to call for a reservation 6-8pm

Charpeter will cover appetizers

Aaron Silverman President

Shannon Rae Daugherty President Elect

Janet Fields Treasurer

Nataliya Matejka Secretary

Eric Wetherington confirmed for swearing in

Tony adjourned meeting at 2:14pm

NARPM CHARLESTON CHAPTER
BOARD MEETING MINUTES
December. 9, 2021

AT 2:03 PM, President Lindsey Blackburn called the meeting to order and mentioned the NARPM Anti-Trust Statement:

It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM's membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs) individual competitors or specific business transactions, or controlling or allocating markets. NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Present Board Members

President - Lindsey Blackburn

Treasurer - Aaron Silverman

Secretary - Krisztina Cole

President Elect - Tony Brown

Past President - Renata Smalls

2022 Secretary - Shannon Rae Daugherty

Aaron Silverman made a motion to approve minutes, Lindsey Blackburn seconded the motion and motion was passed unanimously.

Old Business

- Review and Adopt NARPM 2022 Strategic Plan for Charleston Chapter
- Tony Brown - President Elect, reviewed the Strategic Plan for 2022
- All in attendance agreed on the Objectives & Action Steps as Outlined by Tony

New Business

- Tony Brown asked whether the Chapter Meetings should be held on Zoom or in person in 2022. It was decided that every other meeting would be in person at the CTAR office in North Charleston.
- Tony Brown - President Elect discussed having Speakers at the Chapter meetings via Zoom Link, rather than in person as it may be less expensive and easier to find speakers.

Lindsey Blackburn made motion to adjourn, and Krisztina Cole seconded the motion.

Adjourned meeting at 2:31 PM

Next Board Meeting: Thursday January 13th at 2 PM

Next Chapter Meeting: Saturday February 19th (Oyster Roast)

President Aaron Silverman

President Elect Shannon Rae Daugherty

Secretary Nataliya Matejka

Treasurer Janet Fields

Past President Tony Brown

Legislative Committee Warren Sloane

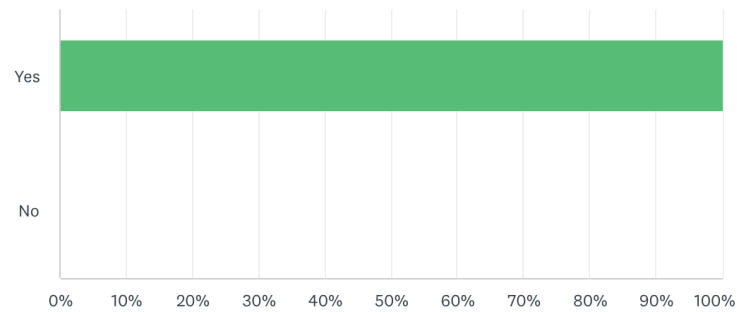
Membership Committee Renata Smalls

Programming/Education Celia Nix

New Member Mentor: Warren Sloan

Please vote YES or NO for the proposed slate of officers for 2023 NARPM Charleston
President Elect - Shannon Daugherty
Treasurer - Janet Fields
Secretary - Nataliya Matejka
Positions not up for election this year are:
President - Aaron Silverman
Past President - Tony Brown

Answered: 19 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	19
No	0.00%	0
TOTAL		19