



National Association of Residential Property Managers

## NARPM Policies and Procedures Manual

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## **NARPM POLICIES AND PROCEDURES MANUAL,**

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### **I. ADMINISTRATION**

#### **A. Officers and Board of Directors Composition**

##### **1. Board**

The Board of Directors shall be composed of the Executive Committee (as defined in this Manual), and one (1) member from each of the NARPM regions nominated by the Nominating Committee based on the criteria set forth in this Manual and elected by the membership.

##### **2. Officers**

Officers of the Association shall be the President, the President-elect, the Treasurer, and the Immediate Past President. These Officers will serve as the Executive Committee. The Chief Executive Officer serves as Corporate Secretary with no voting rights and shall oversee the minutes of all regular and special meetings of the Board of Directors, the Executive Committee, and the Membership.

###### **President**

The President shall be the Chief Elected Officer of the Association; preside at all meetings of the Board of Directors, Executive Committee, and the Membership; review an agenda for each said meeting in conjunction with the Chief Executive Officer; act as the second alternate signatory for funds to be withdrawn from Association accounts; sign all authorized legal documents; and oversee performance of NARPM staff. The President shall serve as an ex-officio member of all standing committees.

The President is a member of the voting body and has the same rights and privileges as all other members which include, discussion to clarify action and to vote on motions, as they deem necessary. However, the impartiality of the presiding officer requires refraining from voting except (i) when the vote is by ballot, or (ii) whenever their vote will affect the results.

###### **President-Elect**

The President-Elect shall fulfill the responsibilities of the President during any presidential absence; be the third alternate signatory for funds to be withdrawn from Association accounts; and prepare for the automatic accession to the presidency on January 1 following the election of Officers and Directors. The President-Elect shall take on such duties as assigned by the President, including working with the Chief Executive Officer on bylaws amendments.

###### **Corporate Secretary**

The Corporate Secretary shall confirm a quorum at all meetings, sign all documents and agreements as approved by the Board of Directors or annual agreements. The Corporate Secretary can sign contracts for events on items budgeted and approved by the planning committees. The Corporate Secretary shall be the Chief Executive Officer of NARPM and a non-voting Member/Officer of the Board of Directors. The Chief Executive Officer of the Association shall be the primary signatory for funds withdrawn from the Associations' accounts subject to expenses being approved by an Officer of NARPM. The Chief Executive Officer shall have the authority to supervise contractors and conduct the day-to-day business of NARPM subject to strategic guidance and oversight by the Board of Directors.

###### **Treasurer**

The Treasurer is the first alternate signatory for Association accounts after the Chief Executive Officer; and is Chair of the Finance Committee. They review the preparation of the reports of financial activities; monitor the investments of the Associations funds; reviews year-end financial report; and ensures that all tax returns and reports required by the government are prepared and filed even if an outside accounting firm is used to facilitate this process.

#### Past President

The Past President shall offer advice and support the President. The Past President shall serve as Chair of the Nominating Committee.

### 3. Board of Directors' Meetings

#### a. Reports/Motions

All Board meeting reports will be written and provided to the Board for review on an approved Board reporting form that will be provided to committee chairs prior to the Board meetings. Reports must be submitted to National by the established deadline, to be included in the Board of Directors packet. Committee reports will be placed on the consent agenda for Board meetings and must be received at least 2 weeks prior to the meeting.

Committee Chairs shall send board reports to their respective NARPM staff contact and CEO and not the entire Board. All Board packets will be distributed at least one (1) week prior to Board meetings and placed on a secure location in the NARPM Community. Only updated agenda items will be sent out after distribution of the final packet with approval by the President of NARPM.

All motions brought before the Board shall be presented in written form and distributed at least one (1) week prior to the meeting on an approved form. The President can approve late submissions of motions after the deadline.

#### b. Meeting Arrangements

Board members will make their own hotel and flight arrangements, unless notified otherwise by National. National will provide the hotel with the VIP list and issue the finalized Board itinerary.

#### c. Quorum and Voting

Two-thirds of the Members of the Board of Directors constitute a quorum. No voting by proxy is allowed. All actions and decisions of the Board of Directors shall be made official by a simple majority vote by the Members present at the meeting, except for those actions and decisions specifically requiring a different majority as stated in the Bylaws and this Manual.

#### d. Dates and Time

The Board of Directors will meet three (3) times each year face to face, with dates and locations to be determined by the Board, and three (3) times virtually. The Chief Executive Officer shall notify all Members of the Board of Directors, in writing, of the date, time and place of regular meetings, at least 60 days prior to the meeting. All meetings of the Board of Directors shall be held in North America or Hawaii. All meeting schedules will be reported in Eastern Time Zone (location of NARPM Staff). Every effort will be made by NARPM staff to note other time zones.

The August Board of Directors Meeting will be located at the site for next year's convention. The fall Board of Directors Planning Retreat will be held at or near NARPM National's business office to allow additional management team members to attend.

#### e. Absences

Absences: All members of the Board of Directors shall attend regularly scheduled Board meetings, unless excused by the Board. One (1) unexcused absence or two (2) excused absences within the year of service will be grounds for the replacement of that Member.

#### f. Virtual Meetings

The Board of Directors, Committees and sub-committees are to use the virtual platform for their meetings as needed. These meetings should be scheduled at least three (3) weeks prior to a Board meeting so reports may be submitted to NARPM in time to be included in Board packets. These meetings are to be scheduled by NARPM staff.

There will be a Board of Directors virtual meeting every other month, when face to face meetings are not held. Committees and sub-committees are to use the virtual platform for their meetings as needed. These meetings should be scheduled at least three (3) weeks prior to the Board meeting so reports may



be submitted to NARPM in time to be included in Board packets. These meetings are to be scheduled by NARPM staff.

a. Conflict of Interest

Conflict of interest procedures for Board members and the Finance Committee shall be used and the entire Board must sign these yearly.

b. Public Trust Policy

In instances where public trust has been violated by a NARPM member, such person will not be allowed to hold a NARPM instructor position, serve as a Chair or Vice Chair of a committee, serve on the NARPM Board of Directors, or hold any leadership position within the National organization for a period of five (5) years from the date of determination by a state licensing division. "Public trust", as used in this context, refers to demonstrated misappropriation of client or customer funds or property, willful discrimination, or fraud resulting in substantial economic harm.

4. Regional Vice President (RVP): All RVPs also serve on the Board of Directors.

a. Liaisons: New Board Members

The RVP term of service is two (2) years. The current RVP is in place until the end of December and should use this time as a training session for the new RVP. As soon as a new RVP is endorsed by the Board, the current RVP will begin training and parallel emailing the new person. New RVPs should be introduced at the Regional Meetings with RVPs during the Annual Convention, and training of the new RVP should continue through year-end.

NARPM Officers and National staff will mentor new RVPs to ensure they accomplish their tasks and interact with Chapters. The liaison shall provide direction when needed and inform the President of concerns. The Chief Executive Officer will also mentor and work closely with new Board members and report any concerns to the President.

b. Regional Vice President Duties - See also Appendix 17

The Regional Vice President (RVP) of NARPM will include one (1) Board member representing each of the Association's Regions who are elected to oversee the work of the National Association of Residential Property Managers (NARPM). These individuals will act as the representatives of the NARPM President in such matters as may be assigned to them. In addition to serving as the spokesperson for the Association in their respective Region, the RVP will work closely with the National staff and appropriate Committee(s) to identify problems or opportunities within their Region and assist wherever possible. An RVP will supervise their assigned Region(s) of NARPM. The NARPM President, RVP, the Regional Ambassadors, Chapter Presidents, Committee Chairs and National staff will work closely with the Regions to provide the most beneficial services and programs to their members.

It is recommended that the RVPs use Ambassadors for Chapter visits. Leaders must go to struggling Chapters first and make a concerted effort to visit every Chapter within their term, which shall not exceed two (2) years. A struggling Chapter is one that has a 5 or lower on their Health Assessment. Ambassadors may not reapply at the end of their term, which shall not exceed two (2) years, without taking one year off. When traveling to a Chapter the RVPs and Ambassadors must be available to meet with members to help with local issues.

Regions with less than 250 members will combine with another Region to share an RVP.

#### REQUIREMENTS

- By September 15 of each year assign two (2) Ambassadors for each Region.
- Attending all NARPM Board meetings in accordance with the Board Attendance Section of the Bylaws and the Absences Section of this Manual. There are usually three (3) virtual meetings/conference calls and three (3) face-to-face meetings.
- The virtual meetings/conference calls are on average two (2) to three (3) hours each. The face-to-face meetings are usually one (1) day and, when possible, are in conjunction with the Broker/Owner Conference and National Convention. All requests for agenda items shall be submitted to the Chief Executive Officer.

- If at any time an RVP is unable to attend a Board Meeting, at least 14 days advance notice is required to be submitted to the Chief Executive Officer for consideration by the Board of an excused absence.
- Review all meeting agendas and data prior to the Board Meeting and make sure all reports are submitted two weeks prior to the Board Meeting. All agenda questions on reports/motions should be sent to the Chief Executive Officer.
- Attend their state conference.
- Attend National's Annual Convention and Broker/Owner Conference.
- RVP reports are used for the purposes of documenting to the entire Board what is truly happening in a specific RVP's Region. For example, a Chapter update on the report should include updates that are no older than 45 days and should clearly demonstrate the RVP is active with their local Chapters. Unacceptable RVP updates include, but are not limited to, using language such as "ditto" or "no update" for multiple report submissions. These reports are due two (2) weeks prior to the Board Meeting.
- Make a good faith effort to visit their Region's Chapters a minimum of one time during their term. Ultimately, the number of Chapter visits should be based on Chapter needs. The RVP visits should be productive and bring added value to the Chapter. RVP visits usually involve a minimum of one (1) to three (3) days depending on the occasion, of which two (2) nights will be reimbursed per Chapter.
- Communicate with the National staff before, during and after each Chapter visit to help assess each Chapter's needs and direction. A Health Assessment of the Chapter must be submitted at the same time as expense reimbursement requests. Expenses must be submitted within 30 days after travel. The Treasurer has the right to deny any travel that is turned in after this time.
- Prompt communication between National staff and an RVP is necessary and therefore should not exceed 48 hours in a reply from either party.
- Failure to remain in contact with National could result in a vote by the Board of Directors to terminate the Director from the RVP position.
- Notify the Chief Executive Officer when traveling for Chapter visits or if the RVP will be out of touch for an extended period of time.
- Write a minimum of two (2) Residential Resource articles per year.
- Identify and select two (2) Chapter members to write one article each for the "Chapter Spotlight" for the Residential Resource magazine. Both of these articles will be published at the same time the RVP article is published.
- Plan and execute four (4) Chapter leader virtual meetings and work with National staff to send out e-mails reminding them several times before the meetings, along with an agenda for the meeting. The last e-mail should be sent no less than 3 days before the scheduled meeting.
- Follow-up after all meetings as necessary.
- Work to improve the relationship between National NARPM and the Chapters by communicating with Chapter leaders at least every three (3) months.
- Promote education and professionalism to all members via e-blasts or leadership conference calls.
- Be aware of any Chapters that are not doing well and provide them with guidance and expertise in getting them back on track. A struggling chapter is one that has a 5 or lower on their Health Assessment. This includes engaging and working with the National staff and the appropriate National Committee(s). This will be accomplished by spending time discussing the issues and brainstorming solutions or finding other Chapters/members to help this Chapter. It may require travel to this Chapter to do whatever might be reasonably needed. Develop and help administer an action plan for struggling Chapters. This plan is to be mutually developed with the local Chapter leadership team and to be utilized by the local Chapter President, President-Elect, Chapter Support Manager, and other Chapter leaders.

- Plan to provide a presentation during Chapter visits. Consider teaching or organizing the State of NARPM PowerPoint or having an “installation ceremony” for incoming Chapter board members.
- Attend NARPM National Strategic Planning and the Director training session. This is usually a three (3) day session held in September of each year but is subject to change.
- Attend all Chapter Leader Training and webinars and promote event(s) to all incoming Chapter Presidents.
- Be aware of geographic areas that want to form a new Chapter and start mentoring them as to what is needed. Upon contact with these members immediately disseminate the Chapters-in-Formation (CIF) information so they can begin meeting to ensure they have enough support to form a viable Chapter and have people who are genuinely interested in taking leadership and committee chair positions. Notify the National staff of these areas so they can follow up with necessary information and assist as needed. The RVP should submit the executed CIF form to National NARPM for approval by the Board of Directors. Look for an existing Chapter that can mentor the CIF.
- NARPM also has available Networking Groups for those areas that do not have the members to start a Chapter. This is an avenue to build membership and provide education and should be offered as another option to forming a Chapter.
- Collect informational data on the Chapters and become familiar with the Board members and make mailing groups, contact lists, phone trees, etc. Assist with communications between National staff and Chapters regarding Chapter Compliance. Remind Chapter leaders of the December 1<sup>st</sup> Chapter Compliance submission annual deadline.
- When new member emails are sent from National the RVP should immediately e-mail the new member, with copy to the Chapter President, welcoming the new member to their Region. The welcome email should contain pertinent new member information such as local Chapter contacts, upcoming NARPM events, etc.
- RVP will oversee and assist with Chapter compliance reports for all Chapters in the Region. RVP will assist Chapters, at their request, wishing to apply for Chapter Excellence awards. NARPM staff will assist the RVP as needed with these tasks.

The Region's affairs and activities shall be directed by the RVP in accordance with Association policies. If it is deemed that during the term of the RVP that any of the above duties are not met, followed and practiced in good faith, then the respective RVP may be removed from the National Board by a majority vote of the National Board of Directors.

a. Regional Teams

All RVPs shall have a team comprised of the Regional Vice President, who shall act as Chair, RVP Ambassadors, along with Chapter Presidents or their assignees that will assist with the oversight of the Region and its activities. RVP Ambassadors must apply for the position and be approved by the incoming President and President-Elect. RVP Ambassadors can assist the RVP by, for example, sending welcome letters/e-mails to new members when the emails come in; putting the agenda together for RVP calls; setting up virtual meetings/conference calls; making sure the committee rep is on the call; and following up with members that have dropped out due to non-renewal, along with traveling to Chapters for visits.

RVPs are to delegate and use others outside their state/area to help. An RVP Ambassador should be the transition person when the RVP changes as this person can help with continuity within the Region and will help the new RVP. The Ambassador can also assist in identifying and grooming future leaders.

RVPs may utilize their travel budget to authorize an RVP Ambassador to travel on their behalf.

b. Regional Leadership Virtual Meetings

The RVPs shall work with National Staff to schedule virtual meetings with Presidents in their respective regions.

Local and state Chapter Presidents, or their designee, must participate in a minimum of two (2) of the Regional meetings. This policy is a requirement for a Chapter to receive annual Compliance; if a Chapter does not meet this requirement, they will not qualify for Chapter Compliance nor Chapter Excellence.

c. **RVP Transition First Meeting, Board Training**

New RVP Board Members are to attend the Board of Directors meetings in October and December and the last quarter RVP virtual/conference calls. The cost to attend is included within the annual budget and includes reimbursement of two nights' rooms and per-diem for two days as outlined in travel policy. No registration fees, or travel reimbursement, are paid out of this amount. Receipts for reimbursements are required to obtain reimbursement.

The application to the Board for reimbursement must comply with all travel and reimbursement policies. Board training and Strategic Planning will be three (3) days, with timing determined by the President-Elect. The meeting shall be one and half (1.5) to two (2) days and includes review of the strategic plan and one (1) day for Board training and review committee goals for the upcoming year. Instructions will be given on how to report to the Directors; how to conduct committee meetings with sub-chairs; how to review the action plan for that year, and how a Board meeting runs. This training will include the Board of Directors and the main Committee Chairs. New Board members will be invited to the October Board meeting as guests.

5. **Board of Directors' Policies**

c. **Antitrust Statement:**

Antitrust Training by the NARPM attorney must occur annually with the Board of Directors and training must also happen at events with restatement of policy to all attendees.

All agendas and programs distributed by NARPM shall contain the following antitrust statement:

It is the policy of the 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. NARPM shall not restrict members' ability to advertise for business, provided the advertising is not false, deceptive or otherwise illegal.

Policy. It is the undeviating policy of the National Association of Residential Property Managers ("Association") to comply strictly with the letter and spirit of all federal and state antitrust laws. Any activities of the Association or Association-related actions of its officers, directors, committee chairs, members, or staff that violate these laws are detrimental to the interests of the Association and are unequivocally contrary to Association policy.

Implementation. Implementation of the antitrust policy of the Association includes, but is not limited to, the following:

A. Meetings. Association membership meetings, and those of the Board of Directors, the Executive Committee, and other committees, are to be conducted pursuant to agendas distributed in advance to attendees; discussions should be limited to agenda items; there should be no substantive discussions of Association matters other than at official meetings; minutes shall be distributed to attendees promptly.

B. Prohibited Subjects. All Association activities or discussions shall be avoided that might be construed as tending to (1) raise, lower, or stabilize prices; (2) regulate production; (3) allocate markets; (4) encourage boycotts; (5) foster unfair trade practices; (6) assist in monopolization; or (7) in any way violate federal or state antitrust laws, or other applicable regulations.

C. Authorization. No officer, director, or member of the Association shall make any representation in public or in private, orally or in writing, that states, or appears to state, an official policy or position of the Association without specific authorization to do so.

D. General Counsel. General Counsel is available to consult whenever potential antitrust issues arise. General Counsel attends Association meetings at the discretion of the Antitrust Compliance Officer and/or the Board of Directors.

E. Examples. The Guidelines below may be referred to as examples of what Association members, officers, directors and employees should and should not do to comply with this policy and the antitrust laws generally.

Reporting. The Association encourages complaints, reports or inquiries about violations of this policy or the antitrust laws. They should be directed to the Association's Antitrust Compliance Officer (the President Elect), or the Secretary/Chief Executive Officer of the Association. Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis for the complaints, reports or inquiries. The Association will conduct a prompt, discreet, and objective review or investigation. The Association prohibits retaliation by or on behalf of the Association against those making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy.

Sanctions. Association members, officers, directors, or employees who participate in conduct that the Board of Directors, by a two-thirds majority vote, determines to be contrary to this policy or the antitrust laws, are subject to disciplinary measures up to and including termination.

## **ANTITRUST COMPLIANCE DO'S AND DON'T'S**

- DO NOT discuss your prices or competitors' prices with a competitor (except when buying from or selling to that competitor) or anything which might affect prices such as costs, discounts, terms of sale, or profit margins.
- DO NOT agree with competitors to uniform terms of sale, warranties, or contract provisions.
- DO NOT agree with competitors to divide customers or territories.
- DO NOT act jointly with one or more competitors to put another competitor at a disadvantage.
- DO NOT try to prevent your supplier from selling to your competitor.
- DO NOT discuss your future pricing, marketing, or policy plans with competitors.
- DO NOT discuss your customers with your competitors.
- DO NOT make statements about your future plans regarding pricing, expansion, or other policies with anti-competitive overtones. Do not participate in discussions where other members do.
- DO NOT propose or agree to any standardization, the purpose of which is anti-competitive, e.g., to injure your competitor.
- DO NOT attend or stay at any informal association meeting where there is no agenda, no minutes are taken, and no association staff member is present.
- DO NOT do anything before or after association meetings, or at social events, which would be improper at a formal association meeting.
- DO NOT interpret or enforce the association's Code of Ethics without direction from the leadership.
- DO NOT regard compliance with the association's Code of Ethics as justification for anti-competitive communications or actions.
- DO NOT represent that the association prohibits or limits advertising, marketing or solicitation other than as the law authorizes prohibitions or limitations.
- DO NOT issue any document or communication on behalf of the association unless with proper authorization.
- DO send copies to an association staff member of any communications or documents sent, received, or developed by you when acting for the association.
- DO alert every employee in your company who deals with the association to these guidelines.
- DO alert association staff and legal counsel to anything improper.
- DO be conservative. If you feel an activity might be improper, ask for guidance from association staff or legal counsel in advance.

### d. Regions

NARPM Chapters are assigned to specific regions within the nation. As amended, effective January 1, 2015, NARPM will have 7 regions. NARPM's Board of Directors will allow any state to formally petition the NARPM Board of Directors to approve a change in their regional affiliation to a neighboring region. The

NARPM Board of Directors will consider, before approving region boundary changes, the formulated priorities until such time as a new committee is reconvened to newly study regional needs.

The priorities are as follows:

PRIORITY 1:	Culture/Commonality
PRIORITY 2:	Ease of Travel
PRIORITY 3:	Board Representation
PRIORITY 4:	Funding Impact/Cost
PRIORITY 5:	Communication
PRIORITY 6:	Population/Growth

The seven (7) regions of NARPM shall be called: Atlantic; Southeast; Central; Southwest; Northwest; Pacific; and the Pacific Islands.

**e. Catastrophic Events**

In the event NARPM faces a catastrophic event, such as loss of leadership or other loss due to mother-nature, the Chief Executive Officer, or NARPM President, if the Chief Executive Officer is unavailable, will send out a notice to the Executive Committee to schedule a meeting within 48 business hours of the event having happened. The Executive Committee will outline plans to overcome the loss and present this plan to the Board of Directors within five business days of their meeting.

Should the event be loss of leadership (other than President and Past President which is outlined in the bylaws), the NARPM Board of Directors shall meet with the Nominating Committee to determine member(s) to fill the vacated positions within 5 business days of the loss. If the President-Elect must step in and fill the vacated position of President, the President-Elect will complete the vacated position term and their elected term as President. The Nominating Committee must, within 5 business days, recommend a qualified replacement for the President-Elect that is approved by the Board of Directors, and the President-Elect position will be permanently filled at the next regularly scheduled election by the members.

**f. Promotion/Advertising policy**

Board Members/Committee Chairs are not allowed to use their position on the board to promote a product or service for an Affiliate. Members will be allowed to use their name, company name and company title, but not their NARPM Board/Committee Chair title. In addition, NARPM Affiliates are prohibited from using board member names in conjunction with the member's NARPM board position in any advertising, marketing or promotional material.

**g. Board of Directors and Committee Chairs Protocol & Conduct**

Being elected to the Board of the National Association of the Residential Property Managers is an honor and privilege. Your peers have selected you to serve the association in representing the industry and their professional interests. It is a commitment and responsibility that can be easily managed by staying focused on the NARPM Core Values:

- Ethics - Respect and integrity among members brought about by ethical, honest and credible behavior. Leaders are held to a higher standard and are expected to be the example for our general membership to emulate.
- Stay true to the NARPM Code of Ethics and Professional Standards.

Networking - Cooperation and sharing amongst colleagues instead of competitors.

- Approach and welcome new members, first time attendees, and guests so they immediately know they are accepted.
- Always be willing to share information and ideas with fellow NARPM® members, as long as information sharing does not lead to antitrust discussions.
- Always "talk the good NARPM talk" among the membership.
- Give a member(s) your full attention when they address you. If they present you with a problem or other matter, see it through to the resolution, if appropriate, or direct them to the right entity (committee chair, staff person, and/or Board member) to handle the issue. Most important, follow up with the member to ensure they were satisfied with the process and/or end result.

- At NARPM related events, mix and mingle (sit) with a combination of friends/long-term members, new members and first-time attendees. Whenever possible, Board members should sit at separate tables.

As a leader, members take pride in getting to meet you and talk with you. By sharing your experiences, they become a part of the NARPM experience. Consequently, it is encouraged that you meet as many different members as you can. By socializing with only your friends, you miss this opportunity as a leader of NARPM.

As a Speaker, NARPM representative, guest, participant, etc.:

- Register for all events in which you are participating, unless directed otherwise by your host organization.
- Published dates and rates for events apply to all members.
- Always bring something to share with the members you are visiting , NARPM membership packet and convention brochure, etc.).
- Meet and greet as many people as possible.
- Be accessible and approachable.
- Arrive early and be prepared.
- Turn off your cell phone.
- Private meetings should be conducted away from the membership.

As an Attendee:

- During all events, be attentive and demonstrate respect to the person(s) speaking.
- Return from designated breaks promptly at or before the specified time.
- Participate in all events and get involved.

Education – Promotion of education and business development. Promotion of continual learning:

- Encourage members and prospective members to attend NARPM events and educational offerings
- Seek education for yourself (CE courses, NARPM meetings, industry-related books and workshops, etc.)

Professionalism – Recognize expertise through professional designation.

- At any NARPM or real estate event, wear your NARPM designation pin(s)
- Support the offering of NARPM certification courses in your area
- Encourage members to take certification courses and seek their NARPM designations

Advocacy – Advance the profession by influencing issues that impact the residential property management industry.

Visionary leadership for the industry:

- Always remember your fiduciary duty to focus on the goals and purpose of the association ahead of your own personal interests.
- Give and prepare yourself to receive constructive criticism.
- Restrict negative communication; be constructive – presentation makes all the difference.
- Avoid personal agendas and politicking.
- If you are dissatisfied with a NARPM member or situation, discuss it with that member or the appropriate leader(s) without involving others.
- Always remember, “NARPM first” when preparing to present an issue, motion, etc. The needs/ wants of a committee/member/yourself are secondary if it does not benefit NARPM as a whole by adhering to the Strategic Plan.
- Even if a controversy exists, demonstrate nothing but a positive attitude, especially when among the membership.

E-mail Guidelines:

- Address person you wish to reply in the To area and CC all others. Do not use BCC. Let the person you are corresponding with know who is in the discussion.
- Make sure to enter a “subject” into the subject line and that the subject matches the content of the email – NARPM.
- Copy the Chief Executive Officer on association business communications.

- Restrict communication to the business being conducted.
- Only include parties as necessary; likewise, make sure to include all parties affected by the information – don't forget to include headquarters.
- Reply as directed; if you can reply to one rather than all, do so.
- Restrict humorous or sarcastic communication, as it can be easily misinterpreted.
- Have access to and check your email daily; respond as needed.
- Insert instructions (reply or reply all) into the email as to who should receive a reply.
- You are expected to reply to emails if your name is in "To" section; if cc:, the email is FYI-only.

Member to Member Communications: (See NARPM Code of Ethics and Professionalism and Sexual Harassment Policy)

Motions to the Board of Directors:

- All motions must be presented on time, complete, and in the format requested (hard copy, electronic, etc.). Use any required template, as applicable. Send to all parties, as instructed.
- If you know of (or will be presenting) a motion that opposes the goals or ideas that another Board member and/or committee will be presenting, notify the appropriate board member/committee chair prior to the motion being presented.
- Include all pertinent background information in a motion so the Board can make an educated and thoughtful decision.
- Include how the motion/action supports the strategic plan.
- Do your homework prior to the board meeting.

Relationship with the NARPM professional staff, committee chairs/members, and board members:

- Be supportive; offer to assist.
- Be respectful: make a request, not an order.
- If they have not been able to complete a task assigned, ask them what they need or how you can help to ensure the task is completed.
- Keep them in the communications loop.
- Exceptions should not be expected for anything that has a clear policy/ procedure.
- Most importantly, do not assume; ask for clarification.

Time Management:

- Manage your time so you can meet your obligations.
- If you cannot meet an obligation, discuss it with the appropriate leader as soon as you realize it is a problem allowing an opportunity for someone else to assist or accomplish the task.

Dress:

All volunteers who serve in a leadership capacity, or as an instructor, shall dress in business casual attire, unless otherwise directed by the President, and portray to the members a professional appearance. The President and CEO of NARPM shall make the decision should a change in attire be needed for meetings.

- Dress in business casual attire, which could include casual slacks and skirts, collared shirts, blouses, or sweaters. Inappropriate attire includes sportswear, jeans, and unkempt clothing, among other options. Please exercise good judgment. Wear NARPM designation pins, etc. whenever possible.
- Wear your Board name badge whenever possible.
- Participation is key – if a NARPM event has a theme calling for a costume or special dress, Board members are to participate and dress accordingly.

Remove your convention name holders when on stage but your Board name badge is appropriate. All leaders and instructors are to submit to the national staff a high-resolution photograph of themselves professionally dressed for use in publications.

Public Speaking:

- Exhibit a professional and positive attitude.
- Be prepared and knowledgeable about the subject.
- Acknowledge all members/affiliates/guests equally and professionally.
- Present yourself as an expert of the industry, as that is how you are perceived.



## Promote Charitable or Community Service Projects

If part of a local and/or regional chapter of NARPM, encourage the chapter to host such a project and make sure to participate in it along with participating and supporting any national NARPM sponsored projects.

### A. Committees

All committee meetings are open unless otherwise stated.

Committee Chairs are to be grooming future leaders of their committee. If members are not attending meetings, Chairs are to counsel members and possibly remove them from committees.

Committee Chairs are to draft reports to the board through a partnership of Chair and their appointed staff member.

All committees, subcommittees, RVPs, and working groups must have an agenda prepared and distributed to all members of their group no later than one week prior to their scheduled meeting. All agendas must include the NARPM antitrust statement. The distribution of the agenda before the meeting will enable members to research items so the session will run productively. National Staff must be present at all association meetings.

#### 1. Appointment of Committee Chairs

The Chairpersons and two Vice Chairpersons of all committees will be selected by the President, with consultation of the President-Elect and Chief Executive Officer, and approved by the Board of Directors. Chairs shall be chosen from within the existing committee or preferably from one of the vice chairs/sub-chairs. All chairpersons are appointed for one year with the ability to serve up to three (3) years to ensure appointments coincide with the Strategic Plan. This consistent appointment of committee chairs will keep the knowledge base of the plan.

A Chairperson may be replaced after the first year should it be determined that the Chair is ineffective and not meeting the goals as assigned by the NARPM Strategic Plan. This decision shall be made in consultation with the Executive Committee, and the Chief Executive Officer, who will seek input from the staff supporting the committee.

This policy is not applicable to the events chairs as they serve a one year appointment and are selected off the current planning committees and ratified by the President and President-Elect.

All committees shall have two Vice Chairpersons who shall assist the chairperson in supporting the volunteers. These Vice Chairpersons shall be appointed after discussing candidates with that year's Chair and the incoming President-Elect and CEO, who will have consulted with the staff supporting the committee. The two Vice Chairs should be candidates to serve as future Chairperson for the Committee.

Chairs will appoint the necessary subcommittees as needed to ensure the NARPM action list is accomplished. NARPM has a list of volunteers who have chosen to work on special assignments and the staff can supply that list to any chair upon request.

NARPM will reimburse Committee Chair expenses for the extra day should they attend event and stay for board meeting. NARPM will also reimburse the Committee Chairs registration fee for the event. Chairs must follow the NARPM Travel Policy for the reimbursement.

#### a. Subcommittees

The subcommittees exist so that a few people can specialize in a certain area. They are the experts and can concentrate on maximizing new ideas and projects. This is important so that not everyone has to work on everything. Subcommittees report their recommendations to the primary committee; the primary committee approves, disapproves, or sends it back for further work. If approved by the primary committee it is brought before the Board of Directors for approval (as a committee recommendation).

#### b. Committee Applications

Members may be invited to serve in the Association in areas of interest or expertise. Committee Applications are electronic, and all signups are performed electronically, so that persons may express

interest in service of their choice. National will forward all committee requests as they are received to the Chairs and staff of the respective committees.

c. Committee Procedures

All committee meeting handouts should include the Mission and Vision statements, strategic goal objectives, and action steps.

Staff should keep the committee and subcommittee sections of the Policy and Procedures manual up-to-date. If a change is made, send a copy to the Chief Executive Officer so it can be distributed to the entire Board.

Committee recommendations and goals should be in writing and passed to the next committee chair.

Keep in mind that the membership list of NARPM is for our own internal use exclusively. It is not to be made public without express permission from the Board.

Notify the Chief Executive Officer at least 2 weeks in advance of how much time you will need on the agenda for either a Board meeting or the Annual Meeting. Any action taken by the committee and motion passed must be reported to the Board.

Ask primary and subcommittee members to notify the Chair and staff first about any problems, ideas, or suggestions that they may have, whether or not these things relate to the committee. If the Chair cannot help, they will channel the information to the Chief Executive Officer.

External or internal publications, press releases, marketing pieces, etc., should be cleared through National NARPM for format and a professional look.

Any activity using the NARPM name, such as interviews and cooperation with other organizations should be done only with the prior knowledge of National who will notify the Board. There may be conflicts with other primary or subcommittee work or legal problems of which committees may not be aware. The President is the spokesperson for NARPM.

Utilize the Vice Chair and subcommittee Chair(s) in a variety of projects and meetings. This is a training time for the next committee Chair.

Committee Meeting Notice:

All meeting schedules will be reported in Eastern Time Zone (location of NARPM staff). Every effort will be made by NARPM staff to note other time zones. Committee meetings should, when possible, be scheduled for the entire year so staff can ensure meetings are placed on the Critical Dates Calendar.

2. Executive Committee

Consists of the Officers of the Association, including President, President-Elect, Treasurer, and Past President. The Executive Committee acts as mentors to other Board members; they help the members stay focused on the structure and procedures of the Board. The Chief Executive Officer/Corporate Secretary shall attend all Executive Committee meetings but does not vote.

The Executive Committee meets at the call of the President or when there is urgent business between Board meetings. Minutes are to be taken by the Chief Executive Officer/Corporate Secretary and distributed to the Board of Directors.

3. Member Services Committee

Is responsible for membership development & retention; statistical data; and chapter formation and growth. Is responsible for assisting with new programs that will help grow chapters and support leadership. Members will aid in the recruitment of new members and retention of existing members. This Committee supports the NARPM Strategic Plan and the Mission and Vision of NARPM. This Committee shall work with the respective Regional Vice Presidents to maintain communications from the Association to the chapters.

a. Member Retention Calling

Member Retention Calling is comprised of volunteers that are designation candidates. After National emails out two (2) renewal notices to members, this committee makes personal calls to each remaining non-renewing member. Staff will confirm designees who are making calls by the end of January.

By the first week of February, NARPM staff equally divides the current list of non-renewed members and assigns to each committee member using an automated database (if available.) The list is provided to the committee chair for future follow-up.

NARPM staff will send the individual personalized renewal forms to each of the volunteers on the Committee before beginning their calls. Committee members will be advised by an email containing links to the tracking database (if available) as to whom they will be asked to direct calls, along with a calling script. During February, the calls are made. The committee members introduce themselves and inquire of the member as to their renewal intentions. The committee member reminds them to go online and make payment.

The committee members will log responses as to the member statuses such as no longer employed, no longer real estate professional, deceased, or the like. These notations become important in tracking where membership is going and why members do not renew.

If the non-renewed member is no longer with the company this is an excellent opportunity for the member calling to inquire about some other person who might have taken their place or in the property management department and an opportunity to recruit.

The deadline for all calls to be made is March 1. The deadline for renewals is March 10. Credit card numbers and credit card information is not to be taken by any retention caller from any member.

The Staff follows up and tracks the progress of each caller throughout the process.

**b. Affiliate Membership**

The Affiliate Advisory Council is also responsible for the development and maintenance of Affiliate membership relationships. The committee will coordinate special sponsorship packages for affiliates in conjunction with assigned NARPM staff.

**4. Professional Standards Committee:**

This Committee oversees the handling of Ethics Complaints filed with the NARPM Chief Executive Officer. They have no additional reporting requirements or meeting attendance requirements other than those outlined below.

Members of any Committee of Professional Standards must be members in good standing with NARPM. The Chair will select from MPM designees first and if needed will then move to RMP designees.

The NARPM Code of Ethics is to be reviewed at least every four years by the NARPM legal counsel. When revisions to the Code of Ethics are approved the class will be revised and updated prior to the expiration of the ethics membership requirement so that each four-year cycle there will be a fresh course.

Members of the Professional Standards Committee will not be found in violation of the public trust policy of NARPM.

Instructions for Filing and Replying to a Code of Ethics Complaint:

Anyone who believes that a NARPM member has violated the [NARPM Code of Ethics](#) may submit a written complaint ("Complaint") to NARPM using the [NARPM Complaint Form, available on the NARPM website](#). The person submitting the complaint is the "Complainant" and the person against whom the Complaint is alleged is the "Respondent."

**A. Content of Complaint.**

The Complaint must state the names of the Complainant(s) and the Respondent(s), and it must specify the Code of Ethics Article(s) (not merely Standards of Professionalism, which serve only as examples to

clarify an Article) alleged to have been violated by the Respondent(s). A Complaint must state the relevant facts that the Complainant believes constitute a violation of the Code of Ethics Article(s) cited. Any evidence supporting the allegations should also be submitted with the Complaint. Note that the burden of proving the allegations in a Complaint falls on the Complainant, who must provide clear and convincing evidence that a NARPM member has violated the Code of Ethics.

The Complaint must be dated and signed by the Complainant.

**B. Submission Timeline and Fee.**

A Complaint must be filed within one hundred eighty (180) days after: (i) the incident upon which the Complaint is based occurred, or (ii) the Complainant became aware of the incident, whichever is later.

A \$100 administrative fee must be submitted along with any Complaint, to cover the expense involved in reviewing and processing the Complaint. Checks should be made payable to NARPM. Any Complaint submitted without the required fee will be returned and will not be processed.

The \$100 fee will be refunded to the Complainant if: (i) the Complaint results in a finding of a violation of the NARPM Code of Ethics; (ii) NARPM makes an initial determination that the Complaint does not pertain to the Code of Ethics and does not pursue the Complaint; or (iii) the Complainant drops the Complaint prior to a Professional Standards Review Panel meeting to begin the final findings of facts determination.

**C. Review Process.**

All Complaints shall be submitted to NARPM's headquarters office. Any proper Complaint, submitted in compliance with these instructions, including the required administrative fee, shall then be forwarded to the NARPM Professional Standards Committee ("Standards Committee") for review.

The Standards Committee will determine whether the Complaint has merit on its face. If the Standards Committee determines the Complaint does not have merit, it may dismiss the Complaint at this stage. If it determines the Complaint does have merit, it will provide the Respondent(s) with notice of the Complaint and an opportunity to respond, in writing, within twenty (20) days of receipt of the notice. If a Respondent fails to respond to the notice in the time allocated, the allegations against the Respondent in the Complaint may be taken as fact.

The Standards Committee will appoint a panel ("Review Panel") to review the Complaint and any response from the Respondent(s). Either the Standards Committee or the Review Panel may amend the Complaint, to add or remove Articles of the Code of Ethics or to add or remove a member as a Respondent.

The Review Panel shall issue a written determination as to whether there has been a violation of the Code of Ethics, and if so, what sanctions will apply. The decision of the Review Panel shall be sent to the Respondent(s) and the Complainant within ten (10) days of its issuance.

**D. Appeals.**

Both the Complainant and the Respondent shall have the right to appeal a dismissal or amendment of the Complaint, or a decision issued by the Review Panel. Instructions for appeal will be included along with notice of the applicable determination provided to the parties. Any appeal must be submitted to NARPM within twenty (20) days of receipt of such notice and must include a \$200 administrative fee.

**a. Complaint Review Procedures**

**Complaint Submission**

Anyone who believes that a NARPM member has violated the NARPM Code of Ethics may submit a written complaint ("Complaint") to NARPM, in accordance with the Instructions for Filing and Replying to a Code of Ethics Complaint. The person submitting the complaint is the "Complainant" and the person against whom the Complaint is alleged is the "Respondent."

All Complaints shall be submitted to NARPM's headquarters office. Any proper Complaint, submitted in compliance with the instructions, including the required administrative fee, shall then be forwarded to the NARPM Professional Standards Committee ("Standards Committee") for review.

### Complaint Review

The Standards Committee will determine whether the Complaint has merit on its face. If the Standards Committee determines the Complaint does not have merit, it may dismiss the Complaint at this stage. If it determines the Complaint does have merit, it will appoint a panel ("Review Panel") to review the Complaint. The Review Panel shall consist of three members of the Standards Committee; if feasible, one of these members should be from the state where the Respondent practices property management.

The Respondent(s) shall be provided with notice of the Complaint and an opportunity to respond in writing within 20 days of receipt of the notice. If a Respondent fails to respond to the notice in the time allotted, the allegations against the Respondent in the Complaint may be deemed fact. Copies of all submissions from the Complainant or Respondent(s) shall be provided to all parties.

If a Complaint alleges violations of multiple Articles of the Code of Ethics, or multiple violations of the same Article in separate instances, each alleged violation shall be considered as a separate count, to be reviewed and ruled upon.

Either the Standards Committee or the Review Panel may amend the Complaint by adding or removing Articles of the Code of Ethics, and/or adding or removing a member as a Respondent to the Complaint. If changes are made to the Complaint after notice has been provided to Respondent(s), notice of the amended Complaint shall be provided to both Complainant and Respondent(s) and the Respondent(s) shall have 20 days from the date of receipt of such notice to respond to the amended Complaint. Should the Complainant not agree with the amendment, they may appeal it and request that the original Complaint be reviewed.

Should the Review Panel determine that the Complainant needs assistance with understanding the Code of Ethics so as to make the Complaint and review process more productive, the Review Panel may request that the Standards Committee Chair appoint a member of the Standards Committee (who is not serving on the Review Panel) to assist the Complainant in formulating the Complaint. This person does not advocate for the Complainant and does not assist the Complainant in obtaining additional information to substantiate the Complaint, but rather assists the Complainant in understanding the Code of Ethics, the appropriate Article(s) to be cited, and the review process.

It is the responsibility of the Complainant to supply sufficient evidence to show that the Respondent(s) violated the NARPM Code of Ethics. It is not the duty of the Review Panel or any other representative of NARPM to find evidence outside the case presented by the Complainant. NARPM will review the documentation submitted pursuant to the Complaint and response; Where NARPM deems it appropriate, it may also seek to obtain and consider other relevant information or documentation (e.g., leases, management agreements, and move in/out documentation, or records of legal proceedings).

Nevertheless, a Complainant has the burden of proving that a NARPM member has violated the Code of Ethics or Standards of Professionalism

The Review Panel will meet in executive session to decide on all counts of the Complaint. For each count, the Review Panel shall decide, based solely on the evidence presented, whether the Respondent has committed a violation of the Code of Ethics. The Review Panel shall prepare a concise written decision stating its conclusions and the basis for its determination. If a violation is found, the decision will also impose sanctions. The decision of the Review Panel, including any specified sanctions, shall be sent to the Respondent(s) and the Complainant within 10 days of its issuance.

### Sanctions

The range of potential sanctions for violating the NARPM Code of Ethics is as follows:

- a. Letter of Reprimand with copy to be placed in member's file.

b. Probation for a stated period not less than thirty (30) days or more than one (1) year, with a requirement to complete a NARPM Ethics Course or any other property management courses deemed appropriate. All designation application processes will be suspended until a member's probation period ends.

c. Suspension of membership for a stated period not less than thirty (30) days or more than one (1) year, with automatic reinstatement of membership in good standing at the end of the specified period of suspension and completion of a NARPM Ethics Course or any other property management courses deemed appropriate. A suspended member is not allowed to use their designations and cannot vote. All designation application processes will be suspended until the membership suspension period ends.

d. Suspension of membership with no reinstatement privilege, for a specified period of one (1) to three (3) years. Member must apply for membership to be reinstated after the specified period has ended. Approval of application shall be based on merits of application at the time it is submitted. Completion of a NARPM Ethics Course, or any other property management courses deemed appropriate, is required prior to reinstatement. Designations will be revoked and the member must reapply and be approved by NARPM prior to resuming use of a designation.

e. Expulsion from membership with no opportunity for reinstatement. Member will permanently lose all rights to use NARPM designations.

Only the sanctions outlined above may be imposed upon a NARPM member for violating the Code of Ethics, and no additional sanctions may be added. The Review Panel's written decision shall clearly articulate the sanctions imposed for any violation found.

#### Appeals

Both the Complainant and the Respondent shall have the right to appeal any dismissal or amendment of a Complaint, or a decision issued by a Review Panel. An appeal must be submitted to NARPM's headquarters office, within twenty (20) days of receipt of notice of the respective dismissal, amendment or Review Panel decision. The appeal must be submitted on the applicable appeal form provided by NARPM and must include a statement explaining why the appeal should be considered. It must be accompanied by a \$200 administrative fee.

Neither the Complainant nor the Respondent(s) may be present at any appeals review session, and neither may submit any additional information in support of or against the Complaint, other than what was submitted for the initial review.

An appeal of a dismissal or amendment shall be reviewed by the Standards Committee Chair. Based only on the information available at the time the determination for dismissal or amendment was made, the Standards Committee Chair will either dismiss the appeal, or grant the appeal and submit the original, unamended Complaint for review. If the appeal is granted, the Standards Committee shall form a new Review Panel to review the Complaint.

An appeal of a Review Panel's written decision shall be reviewed by the NARPM President. Based only on the information available to the Review Panel, the NARPM President will either dismiss the appeal or grant the appeal. If the appeal is granted, the NARPM Board of Directors shall form an Appeals Panel, composed of three directors, who will review the appeal. The Appeals Panel will reach a decision to: (i) confirm the Review Panel's decision; (ii) amend the Review Panel's decision, including instituting alternative sanctions; or (iii) overturn the Review Panel's decision and send the Complaint back for a new review. The Appeals Panel will issue a concise, written decision, which shall be sent to all parties, and may not be appealed.

#### Deliberations

An attorney representing NARPM may be present and offer advice for any deliberations contemplated under these procedures.

Majority vote applies for all actions taken by the Standards Committee, a Review Panel, or an Appeals Panel.

### Final Decisions

All final decisions regarding Code of Ethics violations shall be retained in the applicable member's file with NARPM for a period of five (5) years and may be reviewed and considered in relation to any subsequent Complaint filed against such member during that time period.

### Member Resignation

If a NARPM member resigns from membership before a decision is issued on a Complaint against the member, the Complaint review process shall be suspended. If the NARPM member should attempt to rejoin NARPM at any time thereafter, the NARPM Standards Committee may choose to reopen and process the Complaint.

Standard of Proof: The Complainant has the burden of proving the charges to the Professional Standards Committee. The Complainant must prove with clear and convincing evidence that the NARPM member has violated the Code of Ethics beyond a reasonable doubt. It is the responsibility of the Complainant to supply a preponderance of evidence to the Professional Standards Committee.

The Professional Standards Committee may amend the complaint by removing any inappropriate cited Article(s) of the NARPM Code of Ethics or add any appropriate Article(s) to the complaint.

If the person filing the complaint does not agree with the amendment, they may appeal the decision to the Board of Directors requesting that the original complaint be forwarded for a complaint review in the same procedures as outlined above. All parties to the complaint will be notified of any amendments to the complaint by the Committee prior to the Professional Standard Complaint Review session and final determination.

### Appeal Process:

If the Professional Standards Committee dismisses the complaint as not applicable to the NARPM Code of Ethics, this decision may be appealed to the Professional Standards Chair within twenty (20) days from receipt of the dismissal notice by the complainant. The only information that will be supplied to the Chair will be those materials and information that were made available to the Professional Standards Committee when the decision was made. This information will be presented to the full Professional Standards Committee and considered with the appeal. The person filing the complaint, nor the member, will be permitted to appear before the Committee. If the Committee determines that the complaint was improperly dismissed by the Professional Standards Committee, they will forward it for a new complaint review and the Chief Executive Officer shall coordinate a time for the complaint review with the Professional Standards Committee Chair.

Immediately following the conclusion of the complaint review, the panel's decision will be filed with the Chief Executive Officer. The decision will then be forwarded to the complainant and member. The complainant and member have a right to appeal the decision prior to it being submitted to, and voted on by the NARPM Board of Directors

The Complainant and/or Respondent(s) must submit an Appeal of the Professional Standards Committee Decision of Ethics Compliant form along with a \$200 fee within 20 days of receiving the decision to the Chief Executive Officer, who will forward it to the President of the Association. The Appeal Panel will be appointed by the President from the Board of Directors and will be made up of 3 directors. The panel will review the complaint and the committee's decision within a minimum of 20 days or longer and notify the respondent and complainant of the outcome. Additional information and evidence may not be submitted and will not be considered.

### b. NARPM's Board of Directors

Directors make the final determination if the decision should stand, institute alternative discipline, or send the complaint back for a new complaint review session.

c. A copy of the final decision

Copy will be sent by certified mail to all parties involved in the proceedings. Decisions are to remain confidential with a copy placed in the members file at Headquarters.

C. Finance Committee

Is responsible for fiscal management of all funds of the Association and acts in an advisory capacity to the Board of Directors in planning, forecasting and maintaining good financial management of the Association. Projected expenditures cannot exceed the Association's ability to pay. Oversees the establishment of the annual budget.

d. Professional Development Committee

Is responsible for providing education and training through courses. The Committee shall oversee distance learning and 'stand up' courses taught for designation classes. Is responsible for setting the standards for professional designations bestowed by the Association and for recommending members' applications for designations to the Board.

e. Communications Committee

Oversees all NARPM publications. Is responsible for the development and production of the Association news magazine, and any other Association publications or communication channels that are not the responsibility of other individuals or committees. NARPM staff shall be responsible for layout, printing and distribution of publications, and will assist in the proofing.

f. Governmental Affairs Committee

Responsible for tracking pending and current laws and regulations impacting property management, developing position statements and disseminating information to the membership in conjunction with NARPM staff. This Committee shall recommend position statements to the Board of Directors for approval prior to distribution. If time is of the essence and the President approves positions, it can be distributed and then reviewed at next board meeting.

g. Strategic Planning Committee

Committee make-up for Strategic Planning Committee should consist of: (10) ten NARPM Board of Directors, (5) five standing Committee Chairs, NARPM Chief Executive Officer, (a non-voting member), (1) affiliate, (Chair of Affiliate Advisory Council who is a non-voting member), one (1) participant from the Large Broker Mastermind group, one (1) past presidents, and one (1) at large member who is not associated with a chapter. Should a Past President be serving as a committee chair, or an appointment from the large broker mastermind group, those positions will not count towards the one past president position.

The Incoming President shall follow the policy in making the recommendation for these three (3) positions. In selecting the one (1) participant from the Large Broker Mastermind group, one (1) past president and the one (1) at large member who is not with a chapter, the incoming NARPM President, along with the Strategic Planning Committee Chairperson, will approve the appointment of these individuals based in the collaboration with the CEO and the incoming immediate Past President.

Should a committee member change companies or member type, they will be allowed to complete their two (2) year appointment to maintain the consistency of the committee.

The incoming NARPM President shall chair the committee.

Strategic Planning Committee sessions will take place at the board planning session in September. A minimum of a month prior to the planning session, and after elections are held, a virtual meeting will be held that establishes the agenda for the session and the preplanning that is required for all volunteers.

The Strategic Planning Committee will look to the future of NARPM focusing out two to three-years, keeping in mind anticipated trends that may occur in the industry thereafter by annually reviewing the Strategic Plan and modifying as needed.

Travel reimbursements: All Committee Chairs and Strategic Planning Members shall be reimbursed at the same rate as the Board of Directors.



h. Technology Committee: The Committee is charged with identifying and promoting innovative technology, processes, and services that add value to NARPM and its members.

i. NARPM Political Action Committee

In 2014, NARPM formed a Political Action Committee which carries its own bylaws. PAC Contributions are to follow the policies outlined in Appendix 13. NARPM also adopted an Advocacy Fund that can be used to support NARPM's advocacy efforts.

j. NARPM Women's Council

The Council will have a chair and vice chair who are women that hold professional membership in NARPM. In addition to the Chair and Vice Chair, there shall also be 9 members of the council who will serve rotating years as an advisory board.

k. Affiliate Advisory Council

The NARPM Affiliate Advisory Council (AAC) will assist NARPM in reaching membership growth goals and assist NARPM in handling various affiliate issues and discussions that arise. They will be a conduit in assisting with input on the two trade shows NARPM currently provides, along with any new initiatives and events the organization undertakes. The overall goal of this group is to provide resources for residential property management professionals who desire to learn, grow, and build relationships.

l. Nominating Committee

Is responsible for providing a slate of candidates for office each year, with approval of the Board of Directors. The committee shall be composed as to Bylaws Article IV, Section B, with the Immediate Past President as Chairperson. All members of the Nominating Committee shall disclaim any interest in seeking a position on the Board of Directors for the upcoming year. All reports of the Nominating Committee, along with their members, shall remain confidential.

Committee Term

By the 15<sup>th</sup> of February of each year, the Past President (Chair) shall recommend to the President the appointment of members to the Nominating Committee. The President, along with the Chair shall approve the appointment(s) of Members of this committee. Should the President and Nominating Chair not be able to come to a consensus on the committee appointment, the President-Elect will be called on to make the final decision. The committee's term of service shall be for one (1) year. Members of the Nominating Committee shall be made public.

Process

Background: The Nominating Committee (referred to as NC throughout this policy) is comprised of individuals, one from each of the NARPM regions and the Past President. The region map is located on the website. The objective of the NC is to identify, from the self-nominations submitted by interested candidates, a slate of nominations to be voted upon by the membership and elected to vacant terms to the Board of Directors. Should a region not have a representative apply to be on committee, a member from another region may be chosen from applications.

To accomplish the objective, it is important to implement a system or process that ensures fairness and equitable consideration for each candidate. The process used by NC protects against one member from controlling or overly influencing the votes of the other members.

Be open about the opportunity to serve on the Nominating committee.

NC Chair

The NC Chair will be the facilitator of the NC process. The NC Chair will participate fully in the process but will not share their individual preferences for selection criteria or candidates unless the votes are tied, extremely close, or the NC can't make a final determination. For example, the NC Chair will participate and comment on specific criteria choices, sharing their opinion of which specific criteria should be used as the benchmark for all candidates. Should the process become stalled and discussion stagnant, the NC Chair, in the interest of time and to move the process forward, might ask for final comments from each NC member and call for the vote. If there is a tie vote, the NC Chair will cast their deciding vote. The NC

Chair is not to influence the committee with any personal information from their past experiences when applying.

#### Soliciting Applications

At the Broker Owner Conference and the National Convention, NARPM is to host a session about “getting involved” in NARPM. Look at having a Past President moderate a panel with current and past board members and committee chairs. (Session could be either a breakout or shorter or part of a general session)

Be open with members about the opportunity to serve on the Board. Openness also includes more communication to the members about the opportunity to serve on the Nominating committee.

Look at the make-up of the board each year and determine where there may be gaps. Identify people who fill the gaps and invite them to apply. Use the invite emails that the CEO sends out from RVP's seeking candidate applications; Invite Ambassadors to apply and request Chapter Presidents to submit names of potential candidates. This practice was suggested from ASAE.

The first step in the process is for Staff to prepare a list of all members who are eligible to apply for a position. The NC Chair or CEO will write a blast email to be sent to each eligible member to encourage application. NARPM will solicit names for RVP candidates directly from the current RVP's and the Chief Executive Officer will notify all potential candidates that they were recommended with a link to the application. A web page on [www.narpm.org](http://www.narpm.org) is to be updated each year by staff with a link to the application and all required information.

The Chief Executive Officer will provide the NC with a copy of the overall review of the factual evaluations that were conducted at the end of the year on the board members for officer positions and for those RVP/Directors who reapply for another term. The Chief Executive Officer will also add a statement to the application that NC will contact the committee chair(s) during reference checks, or other persons that they worked with during their NARPM volunteer time (excluding National President and President-Elect), and ask the same set of factual questions on their performance as a volunteer. This contact should be done via email request by the Chief Executive Officer and then all comments forwarded to the NC.

For all RVP Candidates, National staff will request the candidates' individual chapter's President, President-Elect, and Past President, to complete an evaluation survey on the candidates and ask questions about their service to the chapter and if they completed tasks that were assigned. Also, National staff will ask if they would recommend the Candidate for a position on the National Board of Directors and the reason for that choice.

When searching for candidates, the committee will try to obtain a minimum of one qualified applicant from each region. According to the bylaws, “The NC shall strive to choose one Director from each of the NARPM regions. If no one applies, or no one is eligible, qualified, or able to serve from a region, then the NC shall recommend a Director/Regional Vice President candidate from another NARPM region.” At the discretion of the committee, the NC shall have the authority to select the best qualified candidate for a region over other qualified candidates as defined in the bylaws, even if the best candidate resides in another region.

If there are no qualified applicants for a region, the NC may feel it is necessary to recruit candidates. There should be an ongoing process to encourage members to apply for the Board. The RVP should assist in the search for potential applicants within their regions for open positions.

A candidate for RVP/Director shall hold the RMP designation at the time of submitting the self-nomination application.

Candidates for an Officer's position shall hold the MPM designation at the time of submitting the self-nomination application.

To begin the process the NC reviews a sampling of candidate questions that were used by the previous year's NC. By survey, the committee members are asked to give their input on how the questions need to be addressed in each titled area for NARPM for the following year. NC needs to make sure the questions solicit the best person for the position. Committee will be reminded to make the majority of candidate

questions singular, as multiple parts make it difficult to answer on a telephone interview, so therefore do not use more than one question with multiple parts. The solicitation of questions should be done by survey and the final voting on the questions also performed by survey. The Committee will review the results to determine if the choices are truly the best for their interview. If needed, the Committee should be able to ask follow-up questions through the chair. Should the NC feel clarification is needed on any of the responses on the self-nomination application, the Chair shall do so at the beginning of the nominating interview.

The Application will be a four-step process:

Candidates complete an application that includes qualifications and requirements and will submit a video answering questions that are asked by the NC prior to the interviews. These videos are made public to the members and are property of NARPM.

National staff will notify all applicants who failed to meet the minimum requirements. Staff will provide the NC a compilation of qualified candidates along with their contact information and notify each applicant if their application was approved or not. National staff will confirm the candidates have served in volunteer positions within National/Regional as stated in their application.

The deadline for Officer Candidate(s) applications shall be at least four (4) weeks earlier than the RVP/Directors positions so the NC will know if candidates may be needed to fill a potentially vacant region.

National staff shall supply the NC with Peer Evaluations from the previous year's board for each candidate and the committee members will submit their scoring based on their overall impression of the Peer Evaluations.

Officers and for those RVP/Directors who reapply for another term: Each Director who desires to be considered for an Officer position must submit a completed application and must participate in the interview process even though their current term has not expired. Existing Directors fulfilling the remainder of their term will not need to complete another application, or be interviewed, until their term is complete. The Peer Evaluations supplied to the NC shall come from the candidate's prior board members.

RVP/Directors: The Peer Evaluations supplied to the NC shall come from the candidate's prior National Committee Chairman, Vice-Chair, and assigned staff member. If a candidate has no prior national committee experience, the Peer Evaluation will come from the chapter leaders that worked directly with the candidate.

Candidates submit a video answering questions that includes the profile skills needed to serve. These questions will be included on the application form and submitted to the committee prior to the interviews. During this time, the NC will finalize all interview questions.

The NC schedules a meeting with the President and President-Elect who shall lend perspective to the NC. The Nominating Committee interviews the President and/or President-Elect to gain perspective on the profile of what skills are needed to serve on the board. Under no circumstances will the President or President-Elect be present during live interviews of prospective board candidates.

The identity of the members of the NC shall be made public throughout the entire process. The NC Chair will ask candidates all questions.

National staff outlines the Officer and Director Interview format with time schedules and questions that the NC Chair is to ask. This format will be used to ensure that the same questions are asked of each candidate. If questions are provided outside of the application, the members of the NC will submit scoring for each candidate's responses to these questions.

Candidate interviews are held virtually with web cams and several questions will be asked that help in elaborating those answers that were submitted in writing prior to the interview. All interviews are held virtually and are allotted a time of 3 minutes per question with the total interview not to exceed 30 minutes.

Officer candidates will be interviewed first, followed by any Director candidates.

#### I. The Interview Process

During the interview process and upon each question's completion, the NC members will submit their scores. Upon the last interview's completion, all scoring from each NC member will also be complete. The members of the NC will submit scoring for each candidate's application from a scale of 0-5, with 0 being "totally unsatisfactory" and 5 being "Outstanding". Each section scored shall have the same weight.

Staff will inform candidates to be ready 30 minutes ahead of the set interview time, in the event the committee is running ahead of time.

NC shall not discuss interviews and/or candidates outside the set meeting dates. All information is to be shared with the entire committee, and no side bar conversation will be allowed to happen outside the meetings.

#### II. Final Discussions and Selection

Upon completion of all interviews, the NC will reconvene online for final discussions and scoring; this can also be done at the end of the last interview. The NC will review the survey tally on candidates that was completed by the committee members. The NC Chair will identify and invite discussion where there are multiple candidates or candidates that failed to meet a minimum combined average score of 4. Staff will report final scores, and motions to select a slate of Officers and Directors will be entertained. If the members feel a candidate's scoring is inappropriate, changes may be made, but it must be a vote by most NC members. The Chair may vote to create or break a tie. The Chair and CEO shall prepare a recommended slate of Nominees for a vote at a special Board of Directors meeting within ten (10) days of receiving the Committee report. The Chair will also be responsible for notifying all candidates of the committee's recommendations. If the directors do not agree with the slate, it will be returned to the Nominating Committee for further deliberation. Should the Committee choose not to make changes, the slate will be forwarded to the membership as set.

The Nominating Committee shall allow only one director from a NARPM company/brokerage to sit on the NARPM Board of Directors

#### III. Notifying Applicants of the Selection

The NC Chair will receive feedback from the committee on the message to be given to those not chosen. The NC Chair shall notify all applicants as soon as possible of the committee selection, after the Board of Directors have ratified. Those not selected will be encouraged by the NC Chair to apply as an Ambassador for the Region in the coming year.

The Chair is to remind Candidates when contacting those who were selected for the slate that they are not to announce their selection from the nominations committee until after the slate is ratified by the board of directors and presented to the membership for a vote. Candidates are to remember they are not elected until the membership has the final vote. If a candidate violates this policy, it may jeopardize their candidacy on the slate.

#### IV. Ratifying by BOD

A motion for ratification of the slate is drafted for vote by the board of directors. All current directors who applied for positions will be asked to leave the room. Should the Board of Directors be unable to ratify the slate as presented, the slate from the NC will be sent back to the Committee with reasoning for non-ratification. The NC shall review the reasoning and can either change the slate, and then send the slate directly to the members for solicitation of write-in candidates. Afterwards, the membership will hold a final vote. Should the President deem it necessary, ratification will be done through a vote by the directors on the officer candidate, followed by vote of RVP candidates. If necessary, the officer's vote can be held by each open position.

#### V. Post Selection

After all NC business has been completed for this election process, if deemed necessary, the Chair will schedule a call to review how the process worked and if recommendations should be made to the following year's committee.

#### VI. Write-in Candidates

Candidates, other than those nominated by the NC, may be nominated by write-in if said candidates' names are presented in writing to the NC 30 days before the election, accompanied by the signatures of 100 of the professional members. Each Candidate must complete the application and participate in the interview process.

#### VII. Election:

All candidate bios, including those submitted by write in, will be placed on the website, along with their photos. Ballot will recognize "write in" following said candidate who writes in. The membership will be notified on location of the bios prior to the opening of the elections. Information for the bios will be taken from the member's self-nomination application.

Determine mechanisms to get the members the information on elections. Focus on making elections well known across all NARPM communication channels (article in Residential Resource; Social Media; Podcast; etc.).

Dates and criteria for elections will follow requirements in the NARPM Bylaws.

Policies for write in candidates:

- In the case of write-in candidates for elections, NARPM will not publish any articles/information 30 days prior to elections from any candidate. This will not apply when the article is required for their position as a board member. This includes special articles in NARPM magazine, NARPM blogs, NARPM podcasts, etc."
- Application to have a fill-in the blank for "How would you like your name published on the ballot and announcement to the membership."
- A statement that "Candidates understand that **original** videos submitted with application become property of NARPM and can be used to introduce candidates to the membership."
- "NARPM will not permit any campaigning **or soliciting of votes** by candidates during NARPM national events/meetings."
- "Each candidate will be responsible for their own promotional/campaigning messaging and material distribution."

#### VIII. Terms

Those applying for the position/positions on the national Board shall be notified that they are to serve a two (2) year term, unless filling a vacated Director position with a term remaining.

#### IX. Timeline

The election of Officers and Directors shall take place at least 30 days prior to the Convention each year. The ballots will be distributed electronically to all eligible voting members in sufficient time to be returned and tabulated by NARPM staff. The Nominations Committee Chair shall be notified of the ballot results.

The following is an estimated timeline that NC should follow:

- December 15: Begin issuing Call for Nominating Committee appointments
- January 17: Issue Nominating Committee Self-Nominations reminder email if necessary and include article/form/link in the March Resource on nominations.
- February 10: Nominating Committee submission ends. Begin work on making selections.
- February 21: Forward Nominating Committee Roster to President for appointment.
- March 1 – 21: Schedule two calls with Nominating Committee to review application and select criteria, develop questions to be asked of candidates and hold 3 or 4 Committee calls of one hour

each to finalize questions, outline, etc. Do a survey to establish questions. Send last three years' questions and let the committee choose which questions to ask. Try to amend any that were used the previous year.

- March 1: Send out notice for Officers and RVP candidates Self Nominations form and videos are to be submitted to National c/o CEO by Officers: April 1 and RVP's: May 7
- March 15: Send out notice for Officers and RVP candidates Self Nominations form and videos are to be submitted to National c/o CEO by Officers: April 1 and RVP's: May 7
- April 1: Deadline for Officers' Self Nominations to be received.
- April 5-15: Schedule Interviews with Officers
- April: Schedule time for the President and President-Elect join the conference call prior to determining officer's slate. The President and President-Elect shall lend perspective to the Nominating Committee during deliberation; this can be done before the questions are asked to Candidates.
- April 5: RVP candidates Self Nominations form to be submitted to National c/o CEO by RVP's: May 5
- April 18: Send out notice for Directors Self Nominations form to be submitted to National c/o CEO by May 5
- April 29: Send out notice for Directors Self Nominations form to be submitted to National c/o CEO by May 5
- May 30: Deadline for Directors' Self Nominations to be received.
- June 9-15: interview Director Candidates
- Hold wrap up committee conference call to review tally and recommend slate to the BOD (Several conference calls)
- June: Forward slate to Directors to be ratified electronically or via conference call at their June meeting.
- June 30: Send notice of Board of Director candidates, and any write-in solicitation accompanied by signatures of one hundred (100) professional members.
- Send notice for write-in with 30 days' notice after the June Board of Directors Meeting
- Interview write-in candidates after deadlines have expired
- Send Slate of candidates for Board of Directors to members for minimum of a 30 days' notice.
- Last week of August: Elections held and close at 5:00 Eastern Time on the last day.
- Schedule final wrap up meeting to review any changes/recommendations for the following year
- Installation of Officers and Directors will take place at the convention in October.

#### m. Other Committees

The President may form special workgroups and appoint a chair from time to time, and report action to the Board of Directors.

### B. National Office and Management

#### 1. Management of Association

Organization Management Group, located in Virginia, was retained to manage the association as of September 1, 2005, and will serve as NARPM National Headquarters. NARPM is assigned a Chief Executive Officer, Chief Operating Officer, Chapter Support Manager, an Administrative Assistant, a Member Support Manager, and numerous other staff members at National to perform duties for the Association.

Hours of Operation shall be 8:30 AM – 5:30 PM eastern-time zone.

National Communication - Response time from National to members' calls/emails should be 48 hours.

The NARPM logo should be put on all correspondence and forms from National.

NARPM Chief Executive Officer should be copied on all e-mails that are addressed to the leadership.

Chief Executive Officer will provide an organizational chart to be placed on website and distributed to the Board of Directors and Committee Chairs.

National will handle Chapter Leader contacts.

a. Chief Executive Officer (CEO)

- The CEO oversees all operations and staffing for the Association.
- The staff of NARPM holds bi-weekly staff meetings to review items that are coming up with NARPM.
- The management team will copy the CEO on all correspondence with Board of Director members.
- The CEO shall serve as the Corporate Secretary for the Association.
- The CEO shall take all minutes for the Association and must submit the draft to the entire Board of Directors within one (1) week of the conclusion of the meeting.
- The management team will draft a management report that will be included in the bi-monthly board packets.
- The entire agenda packet must be emailed to all directors at least one (1) week prior to the Board Directors meeting. The packet must link all documents to make easy previewing by the directors. "Reminder" emails should go out to all Committee Chairs one (1) week prior to the deadline for their reports to be included in the Board Packet.
- The CEO is to keep the President and President-Elect informed on all pending issues facing the organization.

b. Chief Operating Officer (COO)

This individual assists the CEO by carrying out those responsibilities which are delegated to them by the CEO, and by assuming all the CEO responsibilities in their absence.

The COO handles special projects or activities that require attention at the Executive level. This position plays a major role in preparing issues and developing budgets to grow the organization, while working closely with Chapter Leaders.

- Work with marketing staff on ideas to promote NARPM outside of the current membership.
- Attend State Chapter Meetings and promote NARPM National, as needed when CEO is unavailable.
- Implement policies established by the board
- Consistently work on meeting the needs of the members
- Assist the CEO in researching and developing new programs, products, and services
- Work with CEO to make sure that NARPM volunteers and staff follow the annual strategic plan
- Be cognizant of the NARPM operating budget and assist the CEO in developing new initiatives to benefit the Member
- Work with the Professional Development team to grow the education and designation program within the organization
- Maintain and grow an education program that is responsive to members needs and advances the professionalism of the member
- Serve as back up to the CEO in the event there is support needed.
- Assist staff in developing work plans to support NARPM leaders and Chapters.
- Provide periodic reports to the CEO, along with recommendations to grow the organization.

c. Deputy Executive Director/Chapter Support Manager

- Oversee all aspects of Chapter support on the local and state level.

- Work with Regional Vice Presidents (RVPs), RVP Ambassadors and Chapter Presidents.
- Support Chapter events as needed.
- Oversee a support program for Chapter Presidents to enhance their working with their Chapters.
- Oversee Chapter awards and recognition programs.
- Support the Regional Vice Presidents with state Chapters.
- Provide periodic reports to the CEO, along with recommendations to grow the organization.
- Review Chapter compliance paperwork.
- Make sure all Chapter Leaders are aware of the guidance and support this manager can provide.
- Work closely with the RVPs on Chapter compliance issues to assure strong and successful Chapters
- Consult the RVPs.
- Contact each chapter leader.
- Lead remote professionals team assisting Chapters.
- Attend NARPM meetings as requested by the Chief Executive Officer.

d. NARPM Professional Development Administrator and Education Support Staff

Oversees the NARPM Professional Development arena. Enhances the member's participation in the education venues, whether in person or online. Also, works closely with chapters to encourage the offering of educational courses and maintaining accurate data in the systems.

- Reports directly to the COO or CEO to maintain the successful implementation of all Professional Development needs of NARPM.
- Works closely with the instructors to ensure all courses are kept up to date and course material is easy and readily available when classes are taught.
- Ensure education and designation information is kept up to date in both print and on the website.
- Staff works with instructors to update any changes to class content.
- Assist Professional Development Committee in meeting goals & objectives.
- Staff works closely with the Professional Development Chair and sub chairs, setting up meetings, tracking committee members, helping with agendas and ideas to improve and assist the committee. Staff listens to the members and brings their comments and concerns to the committee and sub chairs.
- Staff creates the class in the database and tracks registrations. Staff continues to monitor class progress and updates the instructors and class contacts to let them know when there are enough registrants to hold the class or if there is a danger of cancelling the class. In addition, Staff ensures that email blasts are sent out individually along with a monthly blast listing of all the classes.
- All Designation applications come to national once the money has been posted by staff. Throughout the candidacy period, staff fields many questions from the candidates and those questions staff are unable to answer are referred to the designation sub chair or the Professional Development Chair. If they are unable to answer the question, it is then sent to experienced designees for their input. Once the candidate has completed everything on the checklist a copy is uploaded to the website. A link to the site is immediately sent to an auditor, who reviews the packet and sends the review back to national. Once the candidate has been approved by the auditor a letter is sent to the candidate letting them know they have been tentatively approved. Staff then sends an email to the Professional Development Committee for their approval. After Committee has have approved, the chairman notes new candidate in their committee report to the Board. A letter goes to the new designee, and the chapter president after Committee approval.

e. NARPM Member Support Staff

Oversee NARPM member services program while enhancing the marketing, communications, public relations, and the support of NARPM RVPs and Chapters. Coordinate staff efforts to use all communications systems efficiently and effectively. Work closely with the COO to oversee daily operations of the organization.

DUTIES AND RESPONSIBILITIES:



Work closely with Chapter Support Manager and Regional Vice Presidents to support chapter growth and enhance the leadership role within chapters. Work with RVPs to ensure chapters have a leadership transition plan.

- Ensure that collateral materials are prepared and used for major programs, products, and services.
- Assist in developing non-dues revenue programs that enhance the income to NARPM. Review current affinity programs to make sure they are a benefit to NARPM. Assist in preparation of budgets. Achieve budget goals.
- Work closely with Graphic Designer to ensure NARPM brand is relevant.
- Communicate the value and successes of associations to target audiences.
- Assist Chapters and Chapter Support Manager in of support chapter leaders as deemed necessary
- Work to grow NARPM membership and bring enhanced services that members desire.
- Compile and maintain a central data source for each chapter and create a tracking mechanism for work with chapters that can be easily reported to the leadership.
- Consult the member services chair.
- Attend NARPM meetings as requested by the Chief Executive Officer.

#### f. NARPM Graphic Designer

Develop all marketing pieces for NARPM. Maintain and update all websites for NARPM  
Maintains the integrity of the NARPM brand.

- Social Media Marketing including but not limited to Facebook/Twitter/LinkedIn/ Instagram
- Work with Communications Committee to build Wikipedia NARPM page
- Marketing- help find avenues to advertise and track membership growth through these media, while also tracking success rates.
- Website- help organize the layout of information and forms to make the website more user friendly and easier to find information.
- Help implement and plan new ideas involving technology: live chat function on website

#### g. Meeting Planner

Responsible for coordinating Annual Convention, arranging hotel accommodations for the board meetings, securing and negotiating hotels for Broker/Owner Conference and other events as needed, and any other special meetings as assigned.

#### h. Public Relations & Digital Media Director

- The Marketing Coordinator holds ultimate responsibility for the organization's marketing activities and oversees the development, marketing and delivery of the programs and services for the organization. Enhance and assure consistent implementation of the Brand strategy by both members and management team.
- Design and publish the Residential Resource.
- Works with the Communications Committee.
- Social Media Marketing including but not limited to Facebook/Twitter/LinkedIn/ Instagram
- Create a visual atmosphere for staging and presentations at clients' conventions
- Work on enhancing social media outlets and new ventures as recommended by the Communications Committee.
- Work closely with event volunteers to produce signature events.
- Develop marketing and promotion strategy for new and existing products
- Work closely with management team to define marketing materials and programs that meet the desired outcome
- Design and implement comprehensive marketing strategies to create awareness of the associations' business activities, while delivering a consistent marketing and communications strategy for the organization.
- Oversee the implementation of a Marketing strategy (including campaigns, events, digital marketing, and PR) for growth of events, membership, and designation and educational programs

- Manage social media presence and direct programs to improve social media reputation and recognition. Includes producing valuable content for the company's online presence, editorial design and organizing the company's publications
- Work with management team to produce ideas for promotional events or activities and organizing them efficiently
- Control budgets and allocate resources amongst projects
- Analyze needs of members and identify solutions that meet those needs
- Maintain market information and statistics pertinent to the programs
- Scan competing programs and brief leadership on findings
- Conduct marketing studies and research
- Support assigned committees
- Write and publish reports
- Recruit sponsors and advertisers
- Other duties as assigned

i. Governmental Affairs Director

This position is responsible for managing NARPM's advocacy efforts in conjunction with the Governmental Affairs Committee as well as managing NARPM PAC and the NARPM Advocacy Fund.

These staffing positions allow for:

- A single point of data collection, communication, reporting, and coordination will prevent loss of knowledge from one volunteer to the next.
- Has complete knowledge and effective use of tools, systems, processes, and resources to effectively mentor and guide NARPM.
- All Staff accepts and is responsible for their contribution to NARPM's success by improving tools, systems, processes, and resources to make chapters successful!

j. Operations

NARPM staff will keep the Board of Directors abreast of legislative and regulatory issues that affect the association's operations. Staff will bring forward position statements from committees for Board of Directors' approval.

Membership applications are processed as soon as they are received at National. NARPM staff will prepare "new member welcome packets" that include a new member certificate with member number, new member stickers, pins, and welcome letter.

New Member Recruit points from new member applications are tracked by NARPM staff on a spreadsheet. Points are purged after one (1) year. All classes of members are entitled to points.

All expenses are to be submitted directly to National where the Staff codes the expense and is scanned into the AP system for CEO's approval. Once approved, expenses are sent to the Treasurer to approve. Once all approvals are received the accounting department will issue the check and will follow the most recent check signing authority document.

National will maintain committee lists in the database and provide rosters to chairs as needed.

All meeting schedules will be reported in Eastern Time Zone (location of NARPM staff). Every effort will be made by NARPM staff to note other time zones.

Refund Requests. The Chief Executive Officer will handle all requests for refunds that fall outside the printed refund guidelines.

k. Operational Evaluations

See APPENDIX 8 - Management & Leadership Review Checklist

## I. Legal Counsel

NARPM will retain legal counsel for the organization.

## C. Miscellaneous Policies

### 1. Gift Protocol Policy

The purpose of the gift protocol is to institute practical yet meaningful guidelines when awarding gifts to NARPM volunteer members, speakers, workshop instructors, certification instructors, committee Chairs and Vice Chairs, NARPM staff, and others. The goal is to maximize the goodwill toward NARPM, while minimizing the cost. A gift shall be defined as “something given by NARPM in appreciation of voluntary service rendered for which there was no compensation.”

The Committee Chair shall submit an annual budget containing the proposed gift allowance to the Finance Committee for approval.

The President, annually and as part of the Board of Directors budget, shall authorize gifts for Board members and committee chairs.

The Chief Executive Officer shall arrange for the annual Presidential gift with input from the Board of Directors. The budget for this gift shall be part of the Board budget. All gifts will be presented at the President's reception, including gifts to the President.

In general, any paid speaker, certification instructor, and others providing service to NARPM and receiving compensation shall not receive gifts.

NARPM staff, as an exception, shall be eligible to receive gifts. The President, through the Board budget, shall arrange all such gifts.

### 2. Designation Policy

Once a member is approved for a designation by the NARPM Professional Development Committee, National Staff sends a copy of the designee's congratulatory letter to their chapter for presentation at the next chapter meeting (if the member is affiliated with a chapter), and a copy is sent to their Regional Vice President.

### 3. Whistle Blower Policy

(1) Encourages NARPM volunteers and staff to come forward with credible information on illegal practices or serious violations of adopted policies of NARPM; (2) specifies that NARPM will protect the person from retaliation; and (3) identifies where such information can be reported.

a. Encouragement of reporting. NARPM encourages complaints, reports or inquiries about illegal practices or serious violations of the NARPM policies, including illegal or improper conduct by NARPM itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which NARPM has existing complaint mechanisms should be addressed under those mechanisms, unless those channels are themselves implicated in the wrongdoing. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

b. Protection from retaliation. NARPM prohibits retaliation by or on behalf of NARPM against its volunteers or management company's staff for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. NARPM and/or its management company reserve the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

c. Where to report. Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the basis for the complaints, reports or inquiries. They should be directed to the NARPM President or to its Chief Executive Officer. If both of those persons are implicated in the complaint, report or inquiry, it should be directed to the NARPM President-Elect. NARPM, in conjunction with its management company, will

conduct a prompt, discreet, and objective review or investigation. NARPM volunteers and staff must recognize that NARPM and its management company may be unable to fully evaluate a vague or general complaint, report or inquiry that is made anonymously.

#### 4. Document Retention and Destruction Policy of NARPM (See Appendix 18)

Identifies the record retention responsibilities of volunteers, members of the Board of Directors, its Management Company, and outsiders for maintaining and documenting the storage and destruction of NARPM documents and records.

##### Retention Rules Policy

NARPM volunteers, members of the Board of Directors, management company staff, and outsiders (i.e., independent contractors via agreements with them) are required to honor these rules: (a) paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the management company; (b) all other paper documents will be destroyed after three years; (c) all other electronic documents will be deleted from all individual computers, data bases, networks, and back-up storage after one year; and (d) no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.

#### 5. Conflict of Interest Policy:

(1) Defines conflicts of interest; (2) identifies classes of individuals within NARPM covered by this policy; (3) facilitates disclosure of information that may help identify conflicts of interest; and (4) specifies procedures to be followed in managing conflicts of interest.

a. Definition of conflicts of interest. A conflict of interest arises when a person in a position of authority over NARPM may personally benefit from a decision he or she could make in that capacity, including indirect benefits, such as to family members or businesses with which the person is closely associated.

b. Individuals covered. Persons covered by this policy are NARPM officers, directors, chief executive and finance executive.

c. Facilitation of disclosure. Persons covered by this policy will annually disclose or update to the President of the Board of Directors on a form provided by NARPM their interests that could give rise to conflicts of interest, such as a list of family members, substantial business or investment holdings, and other transactions or affiliations with businesses and other organizations or those of family members.

d. Procedures to manage conflicts. For each interest disclosed to the President of the Board of Directors, the President will determine whether to: (a) take no action; (b) assure full disclosure to the Board of Directors and other individuals covered by this policy; (c) ask the person to recuse from participation in related discussions or decisions within NARPM; or (d) ask the person to resign from his or her position in NARPM or, if the person refuses to resign, become subject to possible removal in accordance with the NARPM removal procedures. The management company's staff will monitor proposed or ongoing transactions for conflicts of interest and disclose them to the President of the Board of Directors in order to deal with potential or actual conflicts, whether discovered before or after the transaction has occurred.

#### 6. Joint Venture Policy

Requires that NARPM evaluate its participation in joint venture arrangements under Federal tax law and take steps to safeguard the NARPM exempt status with respect to such arrangements. It applies to any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity as further defined in this policy. For purposes of this policy, a joint venture or similar arrangement (or a "venture or arrangement") means any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity without regard to: (1) whether NARPM controls the venture or arrangement; (2) the legal structure of the venture or arrangement; or (3) whether the venture or arrangement is taxed as a partnership or as an association or corporation for federal income tax purposes.

A venture or arrangement is disregarded if it meets both of the following conditions:

(a) 95% or more of the venture's or arrangement's income for its tax year ending within the NARPM tax year is excluded from unrelated business income taxation [including but not limited to: (i) dividends, interest, and annuities; (ii) royalties; (iii) rent from real property and incidental related personal property except to the extent of debt-financing; and (iv) gains or losses from the sale of property]; and

(b) The primary purpose of the contribution to, or investment or participation in, the venture or arrangement by NARPM is the production of income or appreciation of property.

NARPM will: (a) negotiate in its transactions and arrangements with other members of the venture or arrangement such terms and safeguards adequate to ensure that the NARPM exempt status is protected; and (b) take steps to safeguard the NARPM exempt status with respect to the venture or arrangement. Some examples of safeguards include:

- (i) Control over the venture or arrangement sufficient to ensure that it furthers the exempt purpose of NARPM;
- (ii) Requirements that the venture or arrangement gives priority to exempt purposes over maximizing profits for the other participants;
- (iii) That the venture or arrangement does not engage in activities that would jeopardize NARPM exemption; and
- (iv) That all contracts entered into with NARPM be on terms that are arm's length or more favorable to NARPM.

7. Sexual Harassment Policy is defined in the NARPM Bylaws

## II. FINANCES

### A. Dues

#### 1. Annual Dues Amounts

##### Authority to Set

Annual dues and prorated annual dues will be set by the Finance Committee during budgeting process and approved by Board of Directors. Dues are payable by the second Tuesday of the New Year. Early payment discount is given to any member who pays dues prior to the second Tuesday after the first of the year (amended April 2015). Members who do not use the ecommerce portal to pay their annual dues will be charged a processing fee which will be set in the annual budget (currently is \$25).

The Finance Committee, as part of its annual budget process, shall set a new member dues amount that will be collected with the application and paid the second year with the dues proration.

NARPM offers a company membership for any company with four (4) or more individuals. Must be at minimum of two (2) professional members and two (2) support staff members to obtain company pricing.

##### Professional

All members are Conditional members at the time of joining as they have three (3) months to take the NARPM ethics course. After they take it, they become a professional member and are then eligible to apply for RMP and MPM designations. If they do not take the course they are suspended, with no refunding of dues, until the course has been completed within their application year. After one (1) year of suspended status membership is terminated and the member will need to re-apply. Investors are not eligible for Professional Membership; only their employees.

All new members joining NARPM after September 30 in any year will be invoiced immediately to cover membership through the following year.

In the event a new member does not pay the prorated portion of the dues after September 30, staff will create an invoice and mail to new member with a due date of January 1 the following year.

All members residing in North America are to be charged the same amount as a Professional member, payable in US currency.

Staff are to process any membership applications received in December and will not invoice new members' prorated dues of one month. In effect, the new member will receive thirteen (13) months of dues for the cost of 12. This policy is NOT to be promoted to the membership but is operational policy for staff.

Conditional New Members shall receive the ethics class for free once their dues are paid in full.

Individuals who handle Short Term Rentals also qualify as professional members. If state law does not require licensing, the individual will still follow their specific state regulatory licensing law regarding licensure in performing the duties of a property manager. As a professional member, the individual will complete a course of instruction covering the NARPM Code of Ethics.

#### Support Staff Members

Dues for Support Staff members will be set through the budgeting process. A \$50 discount is given for all dues paid by the early bird discount date.

#### Affiliate Members

Affiliate member dues will be set through the budgeting process. A \$50 discount is given for all dues paid by the early bird discount date.

When an Affiliate applies as a business entity that provides products, services, or expertise to the residential property management industry, they must apply for separate membership for each branch office it wishes to participate in NARPM. The employees/contractors who are in the location of the business that holds the affiliate membership will be eligible to participate in NARPM events/functions/committees at member status which will also give them member pricing. Any additional locations must apply for affiliate membership in order to participate.

#### International Members

Dues for International members will be set through the budgeting process. A \$50 discount is given for all dues paid by the early bird discount date.

#### Renewal Notices Schedule

Dues invoices will be mailed according to the following schedule:

1<sup>st</sup> invoice      Immediately following the NARPM Convention to assure no changes in dues structure; dues notices will be emailed to members noting the discounted dues, if paid by date the second Tuesday in January as approved by the Board of Directors during the approval of the budget.

2<sup>nd</sup> invoice      Beginning December 1, weekly emails will be sent to members who still owe dues reminding them of payment and sending electronic links to their invoices.

January Unpaid invoices will be emailed to members. Should dues be paid by the second Tuesday in January, a discounted amount may be deducted from their total dues bill.

February      End of February emails will be sent to those who have not paid with reminder of due date

March 10      Final due date. Anyone who has not paid their dues will be made inactive and emails along with a follow-up letter shall be sent to former members notifying of action. During this time calls for dues collection and a list of non-paid members will be sent to chapter leaders for them to make calls.

Should a member feel they have extenuating circumstances for not paying dues, staff will inform the member to send a letter to National that will be presented to the finance committee for a final decision. Should a decision to waive the fee be granted, this decision will be conveyed to the NARPM board of directors.

Member did not pay correct amount: Prior to March 10, should the improper amount of dues be received at National, staff will call member and notify them that payment cannot be processed until full amount is paid. If staff does not hear from member in 30 days, check shall be returned with a note stating payment could not be processed as incorrect amount was received.

#### 2.      Payment Deadline

Payment of any dues or special assessments must be made within thirty (30) days of the invoice due date. Any payment received after that time will be considered late, and full dues will be owed. The Finance Committee must approve any schedule of late fees or returned check fees. second first Tuesday in January in order to receive the early bird discount.

#### 3.      Prorated Dues

Prorated dues invoices will include a letter explaining the prorated dues.

#### 4. Special Assessments

A special assessment may be imposed upon the membership for a specified funding purpose.

#### 5. New Members Solicited at trade shows for membership recruitment

The Member Services Committee will solicit for new members with a discount offering of \$50 for those who sign up for membership at approved trade shows or an event held by a chapter, specifically for membership recruitment. If a local chapter is participating in a trade show or holding a membership recruitment event they may request the Member Services Committee Chair to allow the offering of this solicitation during their event. If approved, National will supply the chapter with applications that show said discount for designated day(s) as approved by Chair.

### B. Non-dues Revenue

#### 1. Mailing Lists

Pricing for the purchase of the NARPM membership shall be established annually.

If either an Affiliate member or a Non-Affiliate member requests an excel member list:

National will not sell labels to members whose intent is to use them for solicitation.

Regular members who wish to sell their product at a conference/meeting must purchase an exhibit booth at the non-member affiliate price. This policy is to be stated in all conference/meeting brochures.

#### 2. Email list

The NARPM National staff shall be allowed to provide the active membership e-mail address list to any NARPM National Partner at National's discretion. Use of the list must include an "opt-out" feature for members to be taken off affiliate email list and must be included with any correspondence to the membership. This list will only be available to Official Partner sponsors. Affiliates will acknowledge the agreement with guidelines outlined above.

#### 3. Advertising

##### Rates

National sets advertising rates.

Affiliate members will receive discounts on advertising when paying the total cost of their advertising plan up front. All prepaid advertising is nonrefundable. Credit for an ad of equal value may be given for a future issue month.

##### a. Residential Resource

Rates in the Residential Resource are governed by the Communications Committee. An advertiser rate schedule is maintained by the graphics coordinator.

If a NARPM chapter wishes to advertise in the Residential Resource, there are two (2) ad programs available. For a business card size ad, the price will be a flat fee of \$50; for a quarter page ad, the price will be a flat fee of \$135. These represent an approximate 50% discount on advertising.

The Residential Resource is available for purchase in print format and mailed to non-NARPM members at a rate of \$49.95 a year, until such time committee requests price change (2014).

##### b. E-blast Advertising

E-blast advertising prices are determined annually through budgeting process and will be included in advertising guidelines

#### 4. Expenses

a. Reimbursements

Reimbursement requests must be submitted within 30 days after incurring an expense and prior to December 30, of the year expense is incurred. If reimbursements are submitted after 30 day time frame, approval will be required from the Finance Committee prior to payment being issued to the volunteer.

A Committee Chair submits requests for payment of expenses that are incurred by their respective committees. If additional funds are needed outside of the committee budget, a motion must be brought forward to the Finance Committee to look at the impact on the budget. Once this study has concluded, a recommendation will come from the Finance Committee Chair to the Board of Directors.

All expense reimbursements are to be verified by actual receipts.

If additional funds are needed outside of the committee budget then a motion must be brought forward to the Finance Committee to look at the impact on the budget.

The Regional Vice Presidents will be reimbursed for registration fees for attending state events as long as these events are within their budget and within their region. If attending a state meeting, Regional Vice Presidents must take the opportunity while in attendance to meet with their respective local chapter leadership.

With the Board of Directors approval, the Board of Directors will be reimbursed for any event the President determines to be mandatory for Board members to attend. This is to include any training, and ticketed events.

NARPM Board of Directors attending Board meetings will be entitled to receive reimbursements of expenses. When attending a board of directors meeting at the National Convention and Broker Owner Convention, members will be reimbursed for expenses for attending this event which includes early bird registration fees, but not tickets.

There will be limited reimbursements for chairs to attend the broker owner and convention Board meeting session. However, the Convention Chair will be reimbursed for the convention registration fee, and the Broker Owner Conference Chair will be reimbursed for the Conference registration fee. Chairs can attend the Board of Directors meetings. This travel must be in the Committee's budget.

The Chairs of the Broker/Owner and Convention shall be appointed as National Committee Chairs. The incoming chairs are encouraged to attend the board meeting at their respective events.

c. Reimbursement Forms

All reimbursement forms must only contain expenses for the individual member. If expenses are incurred for another NARPM member the expense should be shown on that member's reimbursement form with a note as to who has the receipt for the reimbursement request. All receipts should be the detailed copy, not the credit card summary, with a list of who it covered (if more than one member) and what amount NARPM owes to the volunteer.

If a trip has a dual purpose, (i.e. education/designation class and board meeting) airline tickets/mileage should be split equally between the events. Meals that take place during the respective events should be charged to the correct event.

Committee Chair travel to board meetings during events shall be limited to event registration fee and the extra night room to stay for board meeting; and \$75 per-day food.

Reimbursements will only be made to volunteers after the event has taken place. NARPM will not advance any travel reimbursement prior to an event being held.

C. Travel & Other Reimbursement (See appendix 15)

General Travel Policy:

Travel is expected to be by the lowest and most efficient method of travel available.



## 1. Board of Directors Travel:

The President and President-Elect will be reimbursed for travel to all NARPM National events. NARPM Board members attending Board meetings, Capitol Summit, National Convention, and Broker Owner Conference will be entitled to receive reimbursements of expenses. NARPM will reimburse all travel expenses within the individual's approved budget. NARPM shall also reimburse Directors/RVP's to attend those state conferences that are held and/or sponsored by their respective regions for three (3) days to attend the event.

The President-Elect is authorized to attend up to three (3) state events.

Board members will be reimbursed for any event the President determines to be mandatory, with the Board of Directors approval, for Board members to attend. This is to include any training and ticketed events.

Internet usage: The Board of Directors will be reimbursed internet usage on airlines to allow them to continue their business while traveling on behalf of NARPM. Receipts for internet usage during the trip only must be attached to reimbursement requests. If annual contracts are secured NARPM will reimburse for the month that travel occurs.

Chapter Visits: RVPs are encouraged to travel to individual chapters once a year. If a second chapter visit is needed, the trip must be approved by the Executive Committee thirty (30) days in advance if RVP will be over their respective budget. Since Chapters have use of Trade Show grants for state conferences, RVP's will not be reimbursed to attend the same state trade shows. Chapters are given funding for necessary support through the grants. A Chapter visit is limited to being reimbursed for up to 2 nights.

President Chapter Visits: The President will visit chapters when they are grouped together in a trip. Individual Chapter visits are discouraged as other Chapters will also expect visits. It is the RVP's responsibility to visit individual chapters.

President will be comped the convention registration fee and the tickets for the Gala and President's Celebration event.

New RVP's will be reimbursed for two nights to attend meetings and \$75 per diem plus airline not to exceed amount in budget.

NARPM management staff works with hotels to provide meals to the Board of Directors during their face-to-face meetings. The management staff will present the detailed budget during the drafting of the annual operating budget for NARPM. No alcohol will be included in the budget.

NARPM hosts a dinner for the Board of Directors at their meetings that are held face-to-face. The NARPM management team is to recommend a location subject to the President's approval. All attendees will pay for their own alcohol. Meals will be capped at \$70 per person. NARPM will pay for Directors to bring either their spouse or significant other to that dinner as outlined above.

Should someone who travels for NARPM have an airline ticket that is cancelled due to circumstances beyond the travelers' control, and the cost of the ticket is not refunded, and traveler is unable to use travel funds for the tickets, the individual may submit a request to Finance Committee for approval of refunds.

## 2. Officer Travel

- The President, President-Elect, Treasurer, and Chief Executive Officer ("leaders") for NARPM travel to several events and use the following policy in making travel determinations:  
The four leaders attend Leadership training by an outside organization either late in the year prior to them taking office or in January once they are in office.
- The President, and/or President-Elect, shall attend with the NARPM CEO, or other assigned staff, Trade Show where NARPM sponsors a booth with an outside organization. The President will determine which volunteers should attend.
- 
- The Executive Committee
- The President will meet with the CEO and President-Elect to arrange coverage at State Conference. The President will attend the State conferences that are held by NARPM approved State

Chapter, or State CIF's. The President-Elect will attend three (3) conferences, on a rotating basis, one of which shall be either their own state, or a state closest to their office. The CEO, or other assigned staff person, will rotate between two NARPM State Chapter Conferences annually. Should additional conference attendance be needed for the CEO, the President will approve such travel.

For other conferences: The President shall attend any other NARPM conferences where there is an expected minimum attendance of 150 and prior history shall prove this attendance figure is possible. The Conference must have a proven track record of attendance. If the President is unable to attend, the President-Elect will go on their behalf and use the budget from President to cover expenses. Note: This policy should be reviewed every two (2) years to ensure attendance numbers are still applicable. This policy will not apply if an event conflicts with any set NARPM National event.

The RVP represents Chapters and will be the NARPM leader attending local chapter events. If a group of chapters join together to host an event, and the President is invited, they may attend and represent NARPM. NARPM will not reimburse the President to attend a local chapter event, unless and extenuating circumstance comes up where it would be beneficial to NARPM National for the President to attend.

Treasurer and Past President: The Treasurer and Past President are budgeted to attend one (1) state conference. The conference attendance shall be of their choice that has an expected minimum attendance of 150 and prior history shall prove this attendance figure is possible.

The CEO is encouraged to attend an education/training event outside of NARPM to enhance their ability to bring new ideas and benefits to the organization. NARPM will fund this one additional event in the CEO travel budget.

### 3. Instructor Travel:

Instructors will be paid a fee of \$135 an hour for virtual courses.

Airfare will be covered by NARPM for any designation course instructors teach at the Convention and Broker Owner Retreat.

Instructors will be reimbursed for their expenses as outlined in the general travel policy for teaching three (3) hour courses. All expense reimbursement requests must be submitted within thirty (30) days after the course.

Instructors will be reimbursed for two (2) hotel nights for the teaching courses, at Convention and Broker Owner Retreat.

Should someone who travels for NARPM have an airline ticket that is cancelled due to circumstances beyond the travelers' control, and the cost of the ticket is not refunded, and traveler is unable to use travel funds for the tickets, the individual may submit a request to Finance Committee for approval of refunds.

### 4. Policy for Reimbursing CRMC Auditors

Effective January 1, 2009, the following policy for reimbursement of expenses will apply to any new companies applying for their CRMC designation. At the conclusion of the CRMC audit, all expenses involved with the audit must be submitted to National within thirty (30) days. Guidelines for reimbursement will mirror the guidelines for which NARPM reimburses other travel. National will then bill the CRMC candidate company. The CRMC designation will not be awarded until the CRMC candidate company has paid National the amount outstanding. Should there be a dispute in the amount charged, the CRMC candidate will submit a written dispute to National's office within 5 business days. National will then negotiate between the auditor and the CRMC candidate company. The auditor will be paid upon receipt of the expenses that fall within the NARPM guideline for reimbursement. The candidate will be reimbursed upon receipt of the same documents to NARPM. If reimbursement does not occur within thirty (30) days from the invoice date, the awarding of the CRMC designation to the candidate will be withheld. The sponsoring MPM of the company will be reported to the Finance Committee for further action pertaining to unpaid charges owed to NARPM.

If Audit is handled virtually, the CRMC applicant must handle all costs associated with a virtual audit.

#### D. Payment Procedures

National processes expense requests weekly. The NARPM Chief Executive Officer will follow account payable policy as approved by the Board of Directors.

Reimbursements will be made if expenses are approved in the committee budget. Use the NARPM Reimbursement Form and upload into accounts payable system. If reimbursement is a committee expense, then it must be approved by the committee chair prior to submission. All expenses should go through the National Committee Chair expenses are to be approved by the Treasurer and must be in the committee budget.

Once expenses are received by National, the staff codes the bill to the appropriate accounts, and uploads to the accounts payable system for the Chief Executive Officer for approval. Treasurer reviews the information approves expenses or emails CEO with questions.

#### E. Foundation/Fundraisers

NARPM desires to help charities through their conventions and trade shows. There are times when natural disasters occur and NARPM would like to raise funds for members in need. This can happen at any time on the spur of the moment. Up to 5% of the money raised annually will be used to cover the foundation expenses and be added to the existing balance opening balance in account.

NARPM has a charitable foundation, NARPM Foundation. The foundation is a 501(c)(3) corporation, and any donations are deductible as a charitable contribution.

The NARPM Foundation has trustees who oversee the operations.

NARPM will fund this account with a call to members through an email explaining the formation of the foundation and the use of monies raised in this account. Avenues for collecting funds may include the sharing of funds collected at the convention from members for a charity, additional amount voluntarily assessed during billing, or a special call for need to members when there is a special request from members.

Once the account has been funded, members can apply for funds by submitting a request through the Chief Executive Officer to the NARPM Executive Committee. The request for funds shall outline the need and the amount of funding needed. Also, in the request it should be noted any other sources of funding the requestor will receive in assisting them through this devastation.

Once a request has been submitted, the Chief Executive Officer shall promptly arrange a conference call with the Foundation Trustees to review the request. After a decision has been reached as far as funding the request, the Chief Executive Officer shall immediately notify the members and submit a request to the foundation for a disbursement check to the member.

Fundraising at the convention will continue and money raised during these events will be given to the charities prior to the conclusion of the event. All checks written by members for the fundraiser during these events will be made payable to the charity, not NARPM.

#### F. General Accounting Procedures

##### Fiscal Year

The fiscal year for the Association shall be from January 1 through December 31.

##### Accounting

NARPM accounting is on an accrual basis.

##### Financial Reports

A final year-end budget will be e-mailed to Board and committee Chairs by mid-January, once approved by the Board of Directors.

Financial reports will show how expenses are tracked to budget (budget variance column.)

National will supply a copy of the NARPM bank statement to the President and/or Treasurer upon request.

##### Financial Accounts

The Association shall have four (4) authorized signatures on file with the bank: President, President-elect, Treasurer, and Chief Executive Officer.

## Audits

The Finance Committee shall review the financial records of the Association bi-monthly. A financial review by an independent accounting firm approved by the Finance Committee Chair, and ratified by the NARPM Board of Directors, shall be performed annually. A full audit by an independent accounting firm approved by the Finance Committee Chair, and ratified by NARPM Board of Directors, shall be conducted at a minimum of every five (5) years, or when deemed necessary by the NARPM Board of Directors.

## Insurance/Bonds

NARPM will maintain a General Liability insurance policy and Officers and Directors Professional Liability Insurance, and event cancellation insurance, when deemed necessary due to location of conventions.

The Association shall obtain or be covered by a fidelity bond to cover any persons handling the funds of the Association.

## Fee for Re-processing Checks and Credit Card Billings

A returned check fee and credit card rebilling fee of \$25 each will be charged.

## G. NARPM Investment Fund Strategy

### Purpose

The purpose of this plan is to provide a clear understanding of the investment policy, guidelines and objectives for the total portfolio of the National Association of Residential Property Managers, for the Finance Committee, for the Board of Directors, investment advisors, organization members and other interested parties. This document provides a governing basis for the management and disposition of liquid assets held as investments by National Association of Residential Property Managers.

All funds needed for annual operating expenses shall be placed in a cash management account that yields the maximum rate available.

### Organization

The Finance Committee for the National Association of Residential Property Managers shall establish, if desired, an Investment Subcommittee. The Finance Committee is responsible for the acquisition and maintenance of a Reserve Fund (the Fund). The balance of the Reserve Fund shall be maintained in an amount at one (1) year of Management and General Expenses as stated in the most recent year-end financial statement audit or review by the outside CPA, which includes general and administrative expenses and Member Services. Any amount over the minimum can be used to invest in programs, products, and services which bring benefits to the membership. The fund can be used in the event of a catastrophic emergency that reduces NARPM revenues by 20% or more to assist in covering expenses and ensuring all contracts are paid. Interest derived from the investment management accounts shall revert to the investment management account. The National Association of Residential Property Managers is organized in accordance with section 501(c)(6) of the Internal Revenue Service code and is, therefore, exempt from income taxes.

### Investment Objectives

The principal objectives of the Association's investment program shall be:

- preservation of capital while providing a reasonable gain
- growth of the Reserve Fund at a rate greater than inflation (as measured by the Consumer Price Index)
- maintain a high level of liquidity to provide access to no less than 50% of the fund within an eighteen (18) month period.

### Asset Allocation

Asset allocation is a time-tested strategy that seeks to reduce the risk in a portfolio by diversifying assets across multiple asset classes. In order to achieve the stated objectives for the Fund, the following asset allocation guidelines have been established by the board. Any deviation of (15) percentage points or more of the total portfolio beyond these limits in any asset category requires approval from the finance committee.

Cash and Equivalents - (0-10%)

Short-term investments shall consist of obligations of the U.S. Government, U.S. Agencies and corporate issues rated "A" or better, one year maturity or less, and the two highest grades of commercial paper.

Additionally, a money market fund or comparable investment vehicle with like investments may be used.

Fixed Income - (40-80%)

The quality of the fixed income securities shall be of investment grade as defined by Moody's or Standard & Poor's. Maximum ownership of any one issue, exclusive of U.S. Government issues shall be (15%) of the fixed income portfolio at cost. Cash positions should conform to investments described in section A.

Equities - (15-50%)

Equities are an important component to a balanced and well diversified portfolio. In order to reduce risk in the equity portion of the Fund, equities will be limited to at least 80% of the stocks paying a dividend. The portfolio may hold common stocks publicly traded on U.S. Exchanges and NASDAQ listed stocks. Equity investments in any major sector classification shall not exceed (20%) of the market value of the total equity portfolio. Equity investments in any single issue shall not exceed (7%) of the equity portfolio at market value. Cash positions should conform to investments described in section A.

Prohibited Transactions

Investment activities in the following are prohibited:

- margin purchases
- private placements or other restricted securities
- commodities
- unregistered or restricted stock
- initial public offerings (IPO)
- Options
- Futures trading; and short sales.

Communication and Review

- Monthly: Monthly statements of activity are to be forwarded to the Association and investment advisor.
- Semi-annually: Investment managers should expect to provide semiannual portfolio presentations to the Investment Subcommittee which will include reports of portfolio status, time-weighted returns, performance comparisons to appropriate benchmarks, economic outlook, investment strategy and other related matters which would be of interest to the Association.
- Ongoing: Ongoing communication by phone, letter or personal consultation will be required as deemed necessary by the investment advisor and/or the finance committee.
- Require the subcommittee to meet with the investment company at a minimum of every six (6) months to discuss action to rebalance the investment assets.

The Finance Committee and the Board of Directors place great trust in and emphasis on the investment strategy employed by the Association's investment advisors. Any material changes to or deviations from a manager's approach must be communicated and justified to the board. The board requires the managers to communicate any significant changes in management or investment personnel immediately.

Approval of Investments

The Finance Committee will be responsible for approving placement of the reserve funds, and the Committee chair shall report to the board of directors at the next scheduled meeting on how the money was allocated. The Finance Committee shall be responsible for securing necessary financial investment assistance as needed to meet the investment goals.

It shall take two (2) approved signers of NARPM to electronically endorse any allocations before investments can be made.

Plan Review

The investment advisors shall be responsible for reviewing these guidelines with the finance committee at least annually to assure that they remain valid and relevant. Any recommendations as to changes should be submitted to the Finance Committee of the National Association of Residential Property Managers in writing.

The statement set forth herein shall be effective as of (date), until otherwise amended in writing by the board of the National Association of Residential Property Managers.

### III. Annual Convention and Broker Owner Conference

The Chairs of the Broker/Owner and Convention shall be appointed as National Committee Chairs. The incoming chairs are encouraged to attend the board meeting at their respective events.

This policy can only be amended with 2/3 approval by the Board of Directors.

#### A. Date and Timing

To keep the overall cost of attending to a minimum, it is suggested that the length of the Events be kept to two (2) or three (3) days (excluding existing contracts). When desired, optional "events" can be held in the day(s) just prior to or just after the main Event at an additional cost to those participating.

#### B. Cancellation/Refund Policy

Cancellations must be received in writing. If cancellation is received 30 days prior to date of event, there is a full refund less a \$25 processing fee. If cancellation is received 15-29 days prior to convention date, there is a 50% refund. There is no refund if registration is cancelled 1 -14 days prior to convention date.

Should a death in registrant's immediate family (spouse, significant other, children, siblings, parents, in-laws) occur within thirty (30) days prior to the event, a request is to be submitted in writing to NARPM National. Notice shall be delivered no later than 60 days after the event.

Chief Executive Officer to determine other emergency/major medical situations on a case-by- case basis.

#### C. Officer and Board Amenities/Requirements

The current National President and the Convention Committee and Broker/Owner and Convention Chairs will have their hotel room expense covered by the Association for the duration of National events. Should there be any additional complimentary rooms or amenities available, they will be used for NARPM staff to reduce the expenses to NARPM. Should other decisions need to be made on amenities, the meeting planner will discuss the issue with the Chief Executive Officer to reach a fair and equitable solution.

In negotiating contracts, every effort will be made to have current Board members receive upgraded hotel rooms and/or any other available amenities.

Board members are expected to attend the Annual Convention and Broker Owner Retreat and all special events as an example for others and a show of support for the Association and will be reimbursed only for registration fees relating to the event.

The dress code for Board members at all NARPM events is to be business casual unless instructed otherwise by the President prior to the event.

#### D. Staff

The Chief Executive Officer will ensure there are adequate staff to work at the Events. National, at the discretion of the Chief Executive Officer, may use onsite temporary services as needed, with costs paid by NARPM.

Staff shall manage all negotiations with the facility to ensure that all expenses are in line with the budget. Volunteers will handle convention programming, i.e.: speakers and education sessions.

The NARPM CEO has final say on all decisions on all NARPM events.

#### E. Convention Committee

##### Purpose

The Convention Committee serves as a volunteer group to assist the NARPM Leadership and staff to plan for the educational offerings, program, and meetings of the annual convention, under the leadership of the Convention Chair. The NARPM CEO has final say on all decisions.

- Designation Classes

The Management Staff will plan for the inclusion of designation classes in the Convention and Broker/Owner schedule to secure teachers, receive required needs for the classes and communicate with speakers as necessary.

##### Presidents Reception

The President shall host a 1 ½ hour reception to thank NARPM leaders and recognize the official NARPM partners as part of their sponsorship. The invitee list is comprised of convention attendees who are: NARPM Board of Directors, the Chief Executive Officer, Past-Presidents, current committee chairs, the full convention committee, two employees of each of the Official NARPM Partners and all NARPM Chapter Presidents. This reception will typically be held in the middle of the convention. Invitations will be

sent to all chapter Presidents and Past Presidents inviting them to the event regardless of the registration status and state spouse/significant other is included in invitation.

#### Past President Event:

The NARPM Past Presidents will hold an event at all conventions and invitations will be emailed and distributed at registration. A reception shall be held for at least one (1) hour, and may be a breakfast if the Past Presidents so desire. No spouses are invited to the event and the staff is to work with the immediate past president to plan the event and communicate with the group.

#### F. Guidelines for Advance Site Selection

Future Convention locations should be booked at least three (3) years in advance of the event. If necessary, the Event Planner can look at Convention Centers.

The NARPM Event Planner shall gather suggestions from a third party company (per the direction on NARPM leadership) for suitable convention sites from various sources, inside and outside of NARPM, and report to the Chief Executive Officer who shall ask the Executive Committee to narrow the prospect list to no more than the three (3) top city/location choices to consider for any given convention year.

A Request for Proposals will be sent from third-party consultants. The Request shall outline the projected desires and needs of the Convention Committee, taking into account estimated numbers, usual schedule, and known NARPM preferences. Requests to consider:

- a. the number of desired meeting rooms change to meet function needs. Requests are to include a room for Affiliate Member presentations and a room for Affiliate Member users group meetings (per sponsorship packages)
- b. adequate space and desirable location for easy access to vendors and showcasing exhibits
- c. Ideally all meeting space on one (1) floor
- d. all meeting rooms easily accessible to one another
- e. ideally use a hotel so that NARPM is the major group in house using most space
- f. close proximity to food, attractions and retail outlets for attendees
- g. complimentary 2 bedroom suite for the President, special staff rates, minimum one comp room per 50 used, upgrades for the Board, and any other desired amenities
- h. Convention dates should be between October 16 and 29, avoiding religious holidays
- i. Central networking area where attendees can see other attendees coming and going, find each other easily, and have space for networking
- j. Management company may use a third party in the initial site visit
- k. May hold board meeting in August the year before the convention at the convention hotel

When room rates are presented to the board, staff must include other fees such as taxes, resort fees, and parking.

The Chief Executive Officer will determine which properties seem to be possible choices in any city and which to eliminate because of constraints of space, cost, location or any other factors. Various factors must be considered in balance, because often one disadvantage is outweighed by several strengths. Costs, space, location of facility, and accessibility from all parts of the country are the major considerations.

To ensure that air travel for members is easier and more affordable, cities designated by the majority of airlines as hub cities will receive major consideration for the convention. Current examples of "hub cities" include, but are not limited to San Francisco, Dallas, Denver, Orlando, Houston, St. Louis, and Seattle. Convention locations will rotate from within east, west, and central areas of the United States when convenient but stay in areas with mild weather.

The Chief Executive Officer, in conjunction with the Event Planner, shall do negotiations with facilities, and address any proposal changes, with input from the committee members.

#### 1. Site Visits

The Chief Executive Officer (in conjunction with the Event Planner) shall arrange for visits to potential convention sites, for which NARPM will pay all expenses not covered by the prospective city location if

deemed necessary. The final visit prior to the convention shall include NARPM staff and incoming President, and will coincide with the June board meeting prior to the convention.

## 2. Budget

The Chief Executive Officer, in conjunction with the meeting planner, shall plan for all hotel accommodation and, when possible, negotiate complementary rooms and meals for the attendees. Other expenses shall be reimbursed per NARPM policies and paid from the Member Services Committee (convention) budget. The Event Planner and/or Chief Executive Officer shall work with the facility to ensure all costs are in line with the budget.

## 3. Final Decision

The Executive Committee, after hearing the recommendations from NARPM staff and seeing a written report of the pros and cons of each suggested site, will make the final decision as to city location at the Board meeting prior to the annual convention the second or third year preceding the convention year under consideration. They will present the recommendation to the Board of Directors. The Chief Executive Officer will have the authority to decide on, and contract for, the most acceptable facilities in the city.

NARPM Management Company will collect room commissions from convention and broker owner hotels to cover extra staffing time necessary to put together and have staff in attendance at the event.

Regular members who wish to sell their product at a conference/meeting must purchase an exhibit booth at the non-member affiliate price. This policy is to be stated in all conference/meeting brochures.

See appendix on Convention White Paper

See appendix on Broker Owner White Paper

## IV. PROFESSIONAL DEVELOPMENT

Designations and Certifications:

### A. General Policies

Professional members that receive a designation will retain it as long as they are current members of the Association in one of the classes of membership that permits use of the designations per the NARPM Bylaws or have been reinstated to membership.

Proper Use of Designation: The Chair of the Professional Development Committee shall hold both the RMP and MPM designations.

The proper way to display the designation is without a period between each letter. For example, "Ida Manager R.M.P." is wrong; "Ida Manager, RMP" is correct.

NARPM has established individual designations that can only be used by NARPM members in good standing who have met the criteria as outlined in other areas of the NARPM Policy and Procedures manual and approved by the NARPM Board of Directors. NARPM has also established a company designation which may be used by all members of a company (regardless of whether or not they are NARPM members) as long as the company remains certified. Members must ensure that all NARPM designations are used properly and if a member or a company is found not using correctly, a letter of warning will be sent.

As described in other sections of this manual, all NARPM designations are trademarked and therefore must carry the registered trademark, except the CSS<sup>sm</sup> certification (i.e.: MPM; CRMC; RMP). The marks should not be abbreviated or punctuated (i.e. use MPM not M.P.M.)

Individual NARPM designations should be used in the following order: MPM RMP (with no commas). The MPM is always used before the RMP. Both the MPM and the RMP designations can be used by members who have been awarded the certifications. The NARPM company designation, CRMC, can only be used in conjunction with the company name. The CRMC shall not be used by individuals. Since the CRMC designation is a company designation, any staff member of the CRMC (regardless of whether or not they are a NARPM member) may use the designation in the advertising and marketing of the company, as long as the company remains certified as a CRMC.



NARPM designations will always be listed before any other organization's designation/certifications in NARPM publications. When space is available, NARPM will allow the use of other organizations' designations/certifications.

The incorrect usage would be: Jane Doe, MPM, RMP, CRMC  
Management Company, Inc.

The correct usage would be: Jane Doe, MPM® RMP®  
Management Company, Inc., CRMC®

Also Permitted for Master Property Manager (but only when use of the "®" is not possible): Davey Jones, MPM RMP;

Also Permitted for Residential Management Professionals (but only when use of the "®" is not possible): Davey Jones, RMP;

Also Permitted for Certified Residential Management Company (but only when use of the "®" is not possible): Jones Property Management, CRMC

Members must ensure that all NARPM designations are used properly and if a member or a company is found not using correctly, a letter of warning will be sent.

## B. Fees

Candidacy Fees are established during the budgeting process. The fee for renewal of the CRMC designation is outlined during the budgeting process.

### Course Fees

The following fees are set by NARPM on a national level. These fees are subject to change during the budgeting process.

Any potential or current instructor of a course who audits a course to fulfill instructor qualifications for that course will not be charged a fee with the approval of the Professional Development Chair and Vice Chair.

### 3-hour Courses

The fee for a course is outlined during the budgeting process. A certificate for a free virtual class is provided to new members to be used within 12 months of their original membership date. This certificate is to be sent to staff to discount their registration fee.

### Ethics Course

The fee for the Ethics course is \$45 for members and \$95 for nonmembers.

### Honoring IREM Designations toward RMP and MPM

Any NARPM Member who holds an ARM (Accredited Residential Manager) designation from IREM and applies for the RMP designation from NARPM shall be deemed to have satisfied all education requirements ONLY for the RMP designation. The RMP applicant will still need to satisfy all other requirements for the RMP designation, including, but not limited to, successfully attending, and passing, the NARPM Ethics Course, all NARPM service requirements, all experience & portfolio requirements, and any other requirements not specifically mentioned herewith.

Any NARPM Member who holds the CPM designation from IREM and applies for the RMP and MPM designations from NARPM shall be deemed to have satisfied education requirements for the RMP and MPM designations. The member applicant would still need to satisfy all other requirements for the RMP and MPM designation, including, but not limited to successfully attending and passing the NARPM Ethics Course, all NARPM service requirements, all experience & portfolio requirements, and any other requirements not specifically mentioned herewith. Further, said member-applicant must achieve the RMP and MPM designations separately and not concurrently.

At the time a member applies as a candidate for a designation the letter "C" will be added after the designation which allows everyone to recognize them as a "candidate". This cannot be used as a designation with member's name. It is a mechanism that allows staff to easily track candidates..

## C. Designations

### a. Residential Management Professional (RMP®)

The RMP® designation shall be awarded to Professional Members and Charter Members Life, Honorary, and International Members who have completed the criteria.

The designation title Residential Management Professional (RMP) officially replaced Professional Property Manager (PPM) as of December 31, 2001. The RMP pins are silver.

The requirements for the Residential Management Professional (RMP) include the Ethics Course. This requirement is applicable to all candidate applications after January 1, 1998.

The candidate must be managing a minimum of 25 residential units as outlined in the RMP guideline during the candidacy period and at the time of achieving designation, and can verify management of 100 units over a two-year period.

RMP candidates have the option of attending two NARPM sanctioned state or regional conferences OR one NARPM national convention to meet the current RMP designation requirement.

### b. Master Property Manager (MPM®)

The MPM® designation shall be awarded to Professional Members Life, Honorary, International Members and Charter Members who have already received the RMP designation and have completed the additional criteria.

## D. Certifications

NARPM will allow Support Staff member that is promoted to a Professional Member to use their certifications with any new designations awarded. Retroactively, Professional Members are eligible to earn certifications, as the requirements of the certifications have been met.

- Support Staff Certification (CSS<sup>sm</sup>)

The "Certified Support Specialist" program is developed as a National program. These courses are only available online.

Any CSS candidates will have their designation candidacy start date grandfathered until such time that all CSS courses are available.

The CSS can be specialized by taking the Maintenance courses. These courses are only available online.

The CSS can be specialized by taking the Residential Management Bookkeeper courses. These courses are only available online.

The application fees for CSS, RMP, MPM and CRMC designations are nonrefundable.

## E. Certified Residential Management Company (CRMC®)

The CRMC® designation shall be awarded to property management companies and offices that meet the criteria for professionalism set by the Committee.

The CRMC application fee is established during the budgeting process. The Company being audited will pay for expenses for the auditor using the existing NARPM travel policy.

## F. Applications: CSS, RMP and MPM

### a. Deadlines:

The Application for Candidacy must be received at least sixty (60) days prior to presentation of the designation (annual convention.)

A one (1) year time extension may be granted for any applicant of a designation (RMP, MPM) provided that the request is submitted in writing prior to the expiration of the current application period and a fee equal to 50% of the then current application fee is paid.

A one (1) time only, one (1) year time extension may be granted for any applicant of a CSS certification provided that the request is submitted in writing prior to the expiration of the current application period and a fee equal to 50% of the then current application fee is paid.

A candidate must request reinstatement of candidacy within 90 days of expiration for a 1 year one-time extension at a charge of 50% designation fee.

Deadlines for the RMP/MPM designation packages are to be printed in the Association Critical Dates Calendar or schedule and strictly adhered to.

b. Procedures

Members of NARPM can earn multiple individual and/or company designations within a given year.

When an Application for Candidacy is received, National will send the new candidate the following: an email to the Candidate with the Online Control Panel link; the Self-Managed Candidacy Checklist for the designation applied for; five (5) blank recommendation forms; and a Verification of Service form. National will then input the application into the database and set up a file for the candidate. Mentors are optional as candidates may choose any member to assist in the completion of the required documents.

The CSS, RMP, and MPM Candidacy Checklists may periodically be revised by the Professional Development Committee. Changes to the actual requirements of a designation program must be submitted to the BOD for approval; editorial changes that only serve to make the Checklist requirements more easily understood do not require Board approval.

RMP candidates have the option of attending two NARPM sanctioned state or regional conferences OR one NARPM national convention to meet the current designation requirement. MPM candidates are required to attend two (2) National Conventions or Broker/Owner Conference & Expos or two (2) NARPM sanctioned state or regional conferences.

Candidates should send an email to National at [designationinfo@narpm.org](mailto:designationinfo@narpm.org) once their packet upload to the Online Control Panel is complete. When a completed CSS, RMP, and MPM packet is received for audit, National will e-mail an auditor for packet review. National will email the auditor link to the Online Control panel assigned the candidate that includes the following: "Letter to Auditor", a Verification of Audit form, a copies of the candidates' recommendation letters, and the auditor copy of the candidate's designation package.

Recommendation letters solicited by candidates from their clients and fellow RMP/MPM designees shall be handled as follows:

Letters of Recommendation must be submitted on the required form, all other letters will be rejected during audit. Candidates shall NEVER be given a copy of the recommendation letters nor shall they be included in the original packets. Designation letters of recommendation submitted by a relative to the designation candidate will not be accepted in designation packets.

Once the auditor has approved the package and submits the Verification of Audit form to NARPM staff, National will notify the Professional Development Chair. This certificate number will be placed on designee's plaque that will be presented at a local chapter meeting or at the annual Convention. NARPM staff will send the "Tentatively Approved" letter to the candidate. The National Staff will prepare the Board motion for formal vote of approval.

Once the Professional Development Committee has approved the designees and submitted in their committee report to the Board of Directors, NARPM staff will prepare a congratulatory letter and send a copy of the letter to the member's chapter for presentation at the next chapter meeting (if the member is affiliated with a chapter) and the regional vice president.

Designation plaques will be awarded at a local chapter meeting or at the convention should member not have a local/state/regional chapter.

Designation candidates may be approved by the Board of Directions “contingent on” completion of remaining requirements for Convention attendance or required Designation Course hours provided that all requirements will have been met prior to the Designation Awards presentation.

National will retain an electronic copy of all CSS, RMP, and MPM candidacy packets even after the designation has been approved (as the candidate may request one of those documents previously submitted for a future designation); a copy of the CRMC auditor’s checklist should be retained only for the primary MPM member’s file.

#### G. Applications: CRMC®

##### Deadlines

Candidate must notify National at least three (3) months prior to Convention/presentation date that they are ready to be assigned an auditor. 30 days is needed to order CRMC plaque. Time is needed to assign auditor and reassign if candidate turns down auditor choices, and time is needed for auditor to submit report packet to National.

The Auditor performs the onsite/virtual audit and submits audit reports and photos to National at least 30 days prior to Convention/presentation date.

A one (1) year extension may be granted for any applicant of a designation (CRMC) provided that the request is: 1) submitted in writing prior to the expiration of the current application period, and 2) a fee equal to 50% of the then current application fee is paid.

Deadlines for the RMP/MPM/CRMC completed packets to be received by National are to be printed in the Association critical dates calendar or schedule and strictly adhered to.

##### a) Procedures when an Application for Candidacy is received

National will send the new candidate all of the following: the “CRMC Applicant Email”; the CRMC Designation check list; and the CRMC Candidate Instructions. National will input the application into the database and set up a file for the candidate.

(1) a firm must have a mentor assigned and,

(2) the mentor must sign off that the firm is ready for the audit.

Upon receipt of candidate’s notification that they are ready for audit, National notifies the Designation Sub-Chair for auditor selection. The staff will assign the next auditor in rotation. Note: the candidate has the right to challenge up to three (3) auditors. The auditor chosen must not be in business within 50 miles of the applicant company but within the same time zone and/or region. Once the candidate confirms choice of auditor, National will send the following to the assigned auditor: “CRMC Letter to Assigned Auditor”, the CRMC Auditor Checklist, a CRMC Designation Checklist, and a CRMC Auditor Reimbursement Form.

CRMC applicants requiring a re-audit of their business during the original application period are to be charged with actual costs for the auditor’s return visit, if needed and not done virtually. Actual costs are to be defined as travel, lodging, and meals to complete the return visit and are to be agreed to by both parties prior to re-audit date.

Upon successful completion of the audit, the assigned auditor will submit the audit reports and photos and Auditor Reimbursement Form to National. National will email the audit report to the Designation Sub-Chair for cross-verification of requirements. NARPM staff will assign the CRMC certificate number based on master spreadsheet, and shall notify the Designation Sub-Chair of the certificate number, and send out the “CRMC Tentatively Approved” letter to the candidate, and draw up, in conjunction with the sub-chair the recommendation to the Professional Develop Committee for formal approval. National orders the CRMC plaque (note that this takes longer to produce since it is not an in-house plaque.)

Any suspension of the CRMC shall cause the firm to cease using the designation immediately until such time that the firm properly complies with the above stated procedures.

CRMC Companies who are located in different localities such as franchises and multi-branch offices where the designated MPM does not have direct oversight of offices, must have at least one NARPM member at the location.

As of January 1, 2017 all CRMC firms applying for recertification will require documentation establishing any Branch office (according to the Branch office definition included in the NARPM Policies and Procedures Manual) that they wish to use the CRMC designation. Branch offices will be subject to an on-site audit by a NARPM National approved CRMC auditor. If a Branch office has previously passed an on-site audit, the Branch office is exempt from the on-site audit.

Fees included with the Branch office on-site audit will include the CRMC Auditor Expenses up to \$750, per the NARPM travel policies and a \$150 non-refundable audit fee.

CRMC Branch office renewals will be \$150 annually and should be submitted with CRMC Recertification and Renewal fees.

Documentation for the CRMC as follows:

As of January 1, 2017 CRMC© Candidates are required to provide a list of insurance required by the state for property management firms with candidacy documentation.

b) Branch Offices shall be defined as outlined below:

The designation of a firm as a CRMC applies to the Firm's principal office (referred to as the CRMC Headquarters) and also extends to any and all of the firm's branch offices. A branch office exists wherever these criteria are met:

- Property management is performed out of the office.
- The branch office is under the control or supervision of the designated MPM.
- The work performed there benefits the management firm as a whole.
- There is at least one full-time employee of the company at the office who can be contacted for business.
- The phone is listed and answered in the company name.
- Branch office operates under the same designated CRMC firm name.

On the application, all of the firm's offices that meet the above criteria must be listed. Branch offices may be added or removed throughout the year, however accompanies adding a Branch office must apply for recertification within 60 days of establishing the office.

c) Direct oversight of firms:

Branch offices should be inspected, not just the main office. These auditors will review for consistency in all offices.

ii. Dealing with branches in multi-states:

Branches must have a managing broker as a NARPM member and hold the MPM designation. There must be at least one NARPM member at the branch office.

iii. Franchises holding CRMC:

NARPM shall require each Purchaser of a Franchise to apply for separate CRMC designations.

d) Auditors

The CRMC auditor list are to be only people from a CRMC.

Of the current CRMC auditors, the CRMC candidate has the right to preemptively challenge three (3) auditors on the list auditors, with the remaining auditors rotating according to the current schedule and location. Auditors must be assigned based on location within region/time zone.

A candidate's mentor cannot subsequently be the candidate's auditor.

Auditors for the CRMC program must hold the MPM designation but are not required to be members of the Professional Development Committee. Auditor candidates must complete a CRMC Auditor's Application

e) Renewal of Designation

The CRMC must apply and be approved for renewal of designation every year, but does not require a motion to the Board.

CRMC renewal and recertification fees and paperwork will be due the second Friday in March. A \$50 early bird discount will be issued to CRMC renewals and re-certifications that are submitted prior to January 30, annually. CRMC© companies that fail to meet the March submission deadline set annually will be required to pay a \$500 late fee.

Applications for CRMC renewal of designation that include a change in the name of the firm will not be denied so long as 1) all other requirements are met; 2) the change in name does not include a change in the management of the firm. NOTE: a change in both name and management see #5 below.

Applications for CRMC renewal of designation that include a change in the MPM designee will not be denied so long as all other requirements are met. If the company is lacking an MPM designee, then the designation of CRMC shall be suspended until such time that an MPM designee has joined the firm.

CRMC companies will be invoiced for their Renewal and/or Recertifications in October of each year, keeping in the same timeline with the dues billing, and will have until the dues deadline to comply. Companies who fail to comply with the deadlines will be suspended for 90 days and if not completed by the deadline of the suspension a recommendation will go to the Board of Director to decertify the CRMC from the company

#### f) Changes in a CRMC Firm

A CRMC firm must inform NARPM promptly (within 30 days) of any change in its name, ownership, or its designated MPM.

If the name of the firm changes but the ownership of the firm does not change, then they are required to only submit notification of this change to NARPM. Confirmation of the change becomes effective upon Board approval.

If the designated MPM is changed, then the firm is required to re-certify without completing a new audit.

If the designated MPM leaves without a replacement, then the CRMC is immediately suspended and the firm is required to replace the MPM within the then-current three (3) year designation period to reinstate the CRMC designation. If the MPM is replaced after the then-current three (3) year designation period, the designation expires and the firm is required to complete a re-audit.

If the CRMC firm has had a change in ownership of greater than 50%, the firm must be recertified, even if it has been less than three years requirement for recertification. If the designated MPM is changed, then the firm is required to complete a new audit within a six (6) month grace period from the time which NARPM becomes aware of the change. During this grace period, the CRMC will continue to be recognized as holding the designation without penalty. If the grace period expires without the designation being conferred under the new ownership, the designation is suspended. The recertification documents are to be reviewed by an auditor who is appointed by Professional Development Committee.

#### Virtual Audits –

Your firm must meet the following requirements:

- Be currently engaged in property management.
- Submit three (3) letters of recommendation from clients.
- Submit Verification of Units form completed by a CPA verifying 500 units.
- Have an MPM designee on staff.
- Provide verification of 500-unit years of management experience. (One (1) unit year equals management of one (1) residential unit for one (1) year.)
- Successfully complete a virtual site visit from a NARPM auditor selected by the Certification Committee.
- Complete the audit process within three years of making application.
- Download the CRMC Candidacy Checklist
- Apply for Designation

The non-refundable application fee is \$350. The expenses of a virtual audit for the company are the responsibility of the company being audited.

Should it be determined that an additional onsite audit is deemed necessary, the company being audited will pay the expenses of the auditor. NARPM will pay the auditor and the company will need to reimburse NARPM.

#### Branch Offices

A virtual audit for the company branch offices are to be conducted and are the responsibility of the company being audited to ensure they are all audited.

1. End of Calendar Year Review Cycle:

All course materials will be reviewed for minor errata and corrected during the last two months of every year. All course materials will be updated, date coded and saved online for instructor access no later than the end of December of each year. The courses will not be altered or changed during the year. Any other errata that are discovered or caused by change of law will be archived by staff in an ongoing errata sheet for each course and used by instructors until the courses can be corrected at the next end of year cycle.

2. Course Policies

NARPM does not discriminate on the basis of race, sex, color, religion, national origin, age, handicap, or veteran status in provision of education programs and activities, which it sponsors. It is NARPM policy to adhere to ADA (American with Disabilities Act) guidelines in all its courses.

Special Accommodations – If a student requests special accommodations, staff is to obtain a copy of their accommodations as outlined by a medical professional. Once status is obtained staff will review with instructor to determine means to satisfy the requirements.

Attendance for the full course session is necessary if taken for renewal credits or for the appropriate RMP/MPM designation.

Scheduled dates, locations, instructors, and prices are subject to change.

No audio or video recording is permitted by students. Materials may be duplicated only for personal use of the student.

Attendees do not have to be NARPM members or applicants for a designation. However, attendees are encouraged to apply for candidacy.

For students to receive credit for the course, NARPM requires prompt and complete attendance of all hours for which a class is scheduled and fulfillment of all financial obligations. Late attendance and/or makeup of missed class time are prohibited. Any absence or tardiness will result in loss of course credit.

NARPM classes will not be held in the calendar month prior to and the month of the National Convention. This does not apply to online designation courses.

Courses do not expire at any time. Courses must be completed within 5 years of designation or certification date to meet education requirements for NARPM designations and certifications.

All students must have their video on. NARPM management staff will assist in setting up the class with the instructor and will distribute the exam and the survey on the class.

3. Updating of courses

The following rewrite Cycle will be used for all classes:

NARPM requires a policy of reviewing, updating and, if needed, rewriting courses no less than every 4 years. NARPM shall engage professional course designers/writers to review and propose updates to the existing Designation Courses. Via RFP and volunteer course content review experts/stakeholders, the courses can best represent the NARPM mission to provide the very best education experience for its members and the public with the most current methods, policies, procedures, systems and philosophies of 3<sup>rd</sup> party fee management of single-family homes and other small, scattered site investment properties.

If the required 5 registrations for a 3-hour course have been received prior to the course cutoff date, the course will be held. The Staff will notify the Professional Development Chair along with the instructors and the local chapter coordinator.

3-hour NARPM on-line and virtually courses are offered at the price are set during the budgeting process. All online course lessons on the computer must be completed within 90 days from the date of enrollment (unless individual state law specifies otherwise). Access to the computer lessons will expire at midnight on the 90th day after enrollment except the new member online Ethics course, in which the course must be completed within 90 days of registration.

## H. National Responsibilities

NARPM National will be responsible for assignment of instructors for NARPM designation classes based on location of instructors by region/proximity of requested class.

Virtual Classes – Students will be emailed a copy of course materials and all addendums.

The copyright symbol should be put on all pages as header or footer.

NARPM National will pay the instructors and reimburse their expenses if class is taught at Broker Owner or National Convention.

## I. Presentation of Designations:

The Chapter Presidents, RVP, or National Officers install new designees at the local chapter in addition to recognition being given at the annual convention event. The Chapter President will either conduct the presentation or coordinate the presentation with the RVP or other National Officer when a designee from that chapter has been approved by the BOD. Plaques will be given at the local level if possible, if there is no local chapter the designee will receive their plaque at the annual national convention. An installation script for the designees will be sent with the plaque. Members can request National Staff to send plaques directly to them if they do not desire a presentation.

## J. Course Instructors

### 1. Requirements for New & Current Instructors

The Professional Development Committee (PDC) shall be the governing authority for all Instructors and all Courses on behalf of NARPM. The adding or removal of any courses, or the final approval of new instructors, requires NARPM Board of Directors approval.

The Professional Development Committee shall determine the performance standards of Instructors.

All Instructors must complete the Association approved Instructor Application Form and meet the minimum standards for all Instructors prior to being presented to the Professional Development Committee for approval.

The Professional Development Committee will accept new instructor applications from any qualified member at any time throughout the year. All required information regarding the applicant's qualifications shall be submitted along with the New Instructor Application. An instructor applicant shall demonstrate that he or she possesses good moral character.

The Instructor Applicant must have served as a NARPM National Convention, Regional, or State Conference Speaker a minimum of two (2) times, subject to review.

The Instructor Applicant shall submit a minimum thirty (30) minute video recording which depicts the applicants teaching a Property Manager's educational program, seminar, or panel discussion that will demonstrate that the applicant possesses the basic teaching skills.

The mastery of the basic teaching skills is as follows:

1. The ability to communicate through speech, including the ability to speak clearly at an appropriate rate of speed and with appropriate voice inflection, grammar and vocabulary in a manner that enhances learning.
2. The ability to present an effective visual image to a class, including appropriate appearance and physical mannerisms.
3. The ability to present instruction in an accurate, logical, orderly and understandable manner that enhances learning, to utilize illustrative examples as appropriate, and to respond appropriately to questions from students.
4. The ability to utilize varied instructional techniques in addition to lecture, such as class discussion, role playing or other techniques in a manner that enhances learning.
5. The ability to utilize instructional aids, such as a video or PowerPoint, in a manner that enhances learning.
6. The ability to maintain an appropriate learning environment and effective control of a class.
7. The ability to interact with adult students in a manner that encourages students to learn, that demonstrates an understanding of student backgrounds, that avoids offending the sensibilities of students, and that avoids personal criticism of any other person, agency or organization.



All Instructor applications along with the instructor video will be reviewed by the Organizational Management Group's Education assignee. A written report will be presented to the Chair and Vice Chair of the Professional Development Committee and the Chair of the Instructor Subcommittee for their final recommendation.

All Instructors are required to remain active professional members in NARPM. Further, all Instructors agree to attend one (1) national meeting of the Association at a National Convention at least once every two (2) years as a condition of being an Instructor, unless otherwise approved by the PDC chair prior to the meeting.

All new (within their first year of teaching) Instructor Applicants may initially apply to teach no more than two (2) topics. Additionally, newly approved instructors must co-teach 2 courses with 2 different instructors prior to teaching alone. After the co-taught course, the new instructor will be reviewed by a member of the Professional Development committee to ensure courses are taught using the basic teaching skills. In the case of courses that are rewritten, instructors must participate in a review of all course changes.

With the change in policy, new instructors can now co-teach with one of the instructors which will enable them to teach a virtual course. New instructors are to co-teach one a virtual class if they desire to teach this format and to also co-teach one classroom course, prior to teach a face to face classroom course.

This will not change the current policy that if they will only be teaching classroom course, they must co-teach one NARPM classroom course.

All Instructors shall cooperate with Staff and the PDC in completing any additional applications required for becoming an approved instructor for the state in which a course is to be taught. The purpose of this is to facilitate any student obtaining their state continuing education credits for that particular course. Failure to cooperate will be considered a violation of the Instructor Agreement.

In instances where public trust has been violated by a NARPM Instructor, such person shall be terminated from teaching any approved NARPM educational courses. "Public trust," as used in this context, refers to demonstrated misappropriation of client or customer funds or property, willful discrimination, or fraud resulting in substantial economic harm.

Instructors of designation courses scheduled to teach at a National Convention must be registered for that convention as a member attendee. Instructors under contract to teach at any convention shall be reimbursed as stated in the NARPM Policies and Procedure manual. However, Convention registration will not be reimbursed.

A NARPM certified instructor, who does not qualify as a life member and who is no longer actively managing rental properties, shall be allowed to continue teaching NARPM designation classes until such time that they no longer meet the current NARPM Instructor requirements.

#### Additional Terms:

All Instructors and Instructor Applicants are required to comply with the Instructor Code of Conduct as approved and amended from time to time by the Professional Development Committee, the Professional Standards Committee, and the Board of Directors of the Association (Section 4).

All Instructors shall be independent contractors of the Association and shall not be considered employees of the Association.

All Instructors must be under contract with the Association.

All Instructor Agreements shall be for the term of two (2) years.

All instructors are required to complete a conflict of interest statement as a part of the annual Instructor Contract.

The Association shall distribute new Agreements sixty (60) days prior to the expiration of the current Agreement if they are to be renewed. Staff will notify any Instructor in the event of non-renewal at the same time as those that are being renewed. Agreements and notifications will be sent in June each year.

All Instructors are to provide a Laptop at their own expense for their use during the presentation of a NARPM course unless other arrangements are made with the course sponsor. Further, all instructors shall be personally capable of properly setting up and operating their presentation equipment.

All instructors must have a minimum intermediate level of competence in the use of Microsoft PowerPoint and have a software license for the program on the computing device being used.

The Professional Development Committee will schedule mandatory intensive training so that the Instructors become better educators. Every year all courses will be reviewed for updated information and/or possible rewrites.

Annual Instructor Training Session is required at least once every two (2) years in order to maintain approved instructor status. Failure to attend will be considered a violation of the Instructor Agreement. This session shall be held annually and shall not be held during any other national or regional meeting of the Association. This session shall be held at the National Headquarters. The cost of the session shall be borne by the Association subject to the existing NARPM Travel Policy.

K. Terms:

There will be at least one (1) instructor selected for each class in case an Instructor is unable to complete the term or the volume of classes requires an additional Instructor. Each Applicant may apply to teach at least two (2) classes. Number of approved classes an applicant may teach will depend on the number of current NARPM instructors who are qualified to teach the respective courses.

Each course will have a primary instructor in each region and one backup instructor who will rotate each year. Selection of instructors will be based on the rotation schedule and location of instructors in proximity/region to the course and will be coordinated by staff; the schedule will be reported to the committee members at each national committee meeting.

L. Instructor Code of Conduct as follows:

The primary objective of this NARPM Instructor Code of Conduct is to establish and define a set of reasonable standards for all Instructors of the Association's Approved Courses. The Association expects each Instructor to conduct him/herself at all times in a manner that reflects positively on the Association, instills the confidence and respect of students, and avoids even the appearance of impropriety. Each Instructor is expected to comply with this Code of Conduct not only within its content but also within the spirit intended.

Article 1

Industry Knowledge and Experience

The Instructors shall maintain the highest level of industry knowledge and shall keep up to date with current trends and developments relating to the subjects being taught. All Instructors are expected to maintain consistent experience with a Single-Family portfolio during their term as an Instructor. An Instructor shall not give an opinion to students on subjects that are beyond the scope of their knowledge or are of a legal nature, but shall direct students to obtain competent advice and opinions from qualified sources.

Article 2

Quality of Instructional Skills

The Instructors shall maintain a high quality and high level of instructional skills. The Instructor shall agree to the ongoing evaluation of performance through the evaluations of students and designated observers. The Instructors shall also agree to ongoing skill development during the term of the Instructor Agreement.

Article 3

Business/Personnel Solicitation

The Instructors shall not solicit any sort of business or personnel of any kind before, during, or after any Association class assignment. Examples of prohibited business and/or personnel solicitation include but are not limited to:

- 3.1 Distributing written materials that would promote employment to students
- 3.2 Direct verbal contact inside or outside the classroom initiated by the Instructor promoting employment to students
- 3.3 Utilizing course rosters for direct mail, e-mail or telephone solicitation of any business venture or employment
- 3.4 Direct contact with NARPM Chapters (other than Instructor's own chapter) or any other business or agencies for obtaining NARPM teaching assignments

#### Article 4

##### Professional Conduct / Dress Code

When on a teaching assignment, the Instructors shall at all times, both inside and outside the classroom, conduct themselves in a dignified and professional manner. Examples of Conduct shall include, but not be limited to:

- 4.1 Representing the Association and its programs in a professional and positive manner.
- 4.2 Not using profanity or "off color" stories.
- 4.3 Refraining from behavior that might be reasonably construed as insulting or offensive to any individual or group of individuals, such as sarcasm, chauvinism, sexism, racism, or the use of derogatory remarks, or other rude behavior.
- 4.4 Not committing any form of sexual advance, innuendo, or harassment.
- 4.5 Not soliciting about any Instructor Evaluations from any student.
- 4.6 All Instructors shall adhere themselves to a reasonable Professional Dress Code during the hours of the course.

#### Article 5

##### Instructor Preparation / Adherence to Course Outline/Materials

The instructors shall properly prepare for each teaching assignment and be fully familiar with the current course materials. The instructors shall follow the course content, materials, methodology, and time schedule as defined by the Professional Development Committee and the Association.

#### Article 6

##### Assisting New Instructors

From time to time, the Association will require new instructors to attend and audit courses in advance of their being scheduled to teach on their own. The instructors agree to assist the Association with the training of the new instructors by sharing and creating positive and beneficial learning experiences.

#### Article 7

##### Cooperation

The instructors agree to fully cooperate and assist with the enforcement of this Code of Conduct in the resolution of any matter brought before the Association, the Professional Development Committee, and/or the Ethics Committee.

##### M. Continuing Education Credits

Each Chapter or State shall be responsible for getting their own CE approved and reported.

##### N. Other Educational Offerings

###### a) Speaker's Resource Library

A program that facilitates a speaker's resource library with appropriate disclosures and guidelines will be developed.

In order to have a course listed on NARPM Speaker's Bureau, the author/sponsor/company must be a NARPM member in good standing.

###### b) Software Vendor – NARPM Approved courses.

Any software vendor who wishes to offer an elective course must fill out the application that is located in the appendix #9 called Software Vendor – NARPM Approved Course Application

##### O. National Management Staff duties with events:

NARPM National and Management Staff fully supports the National Convention and the Owner/Broker Conference.

P. Writing of courses:

All members are to only give ideas for course content. NARPM will hire professionals to write /design the classes and use quality content and graphics in order to raise the level of NARPM education. Members will review the final product.

Q. Darryl Kazen Memorial Scholarship

Application

The Scholarship application packet must be submitted in its entirety except the letters of recommendations which will be sent directly to NARPM National. Incomplete application packets will be rejected.

Deadline for application is June 30<sup>th</sup>.

Requirements for Application

Applicant must be current Professional member of NARPM in good standing, Applicant must be a current candidate for RMP or have received RMP Designation after the most recent Convention.

Applicant must be registered for the upcoming NARPM Convention.

Applicant must verify passing all required 6 hour educational courses for RMP.

Short Essay is required, with the topic to be determined by the Professional Development Committee by February 1<sup>st</sup>. Applicant must receive a letter of recommendation from Local/State Chapter President.

Letter of Recommendation form must be completed. These letters must be sent directly to NARPM for National, Local, State or National meeting attendance verification, and Applicant must have an additional 10 hours of participation at a local, state or national level through volunteer hours.

Process

When applications are received in its entirety, NARPM staff will process and ensure all requirements have been met. By July 15<sup>th</sup>, NARPM staff will forward all completed applications to the Professional Development Chair and Designation Vice-Chair for selection. Scholarship winner will be announced at the NARPM Convention of that year.

Scholarship award

The Darryl Kazen Memorial Scholarship award cover the fees paid by the applicant

1. Designation Application Fee
2. 3 hour courses fee requirement (Early registration only)
3. Convention registration fee

V. MARKETING AND PROMOTIONAL

A. Logos and Trademarks

Logo Usage Guidelines

Only current NARPM members may use the NARPM logo. Only members in possession of a current NARPM designation may use that designation. NARPM memberships and RMP and MPM designations are presented to individuals only and not to an entire company. When a NARPM member is the owner/broker/supervisor of the property management function of the company, the company is allowed to use the NARPM logo on the company letterhead, advertising, and marketing materials. However, employees who are not NARPM members are NOT allowed to use the NARPM logo on their business cards, other than CRMC listed with their company name.

No products bearing the NARPM logo may be produced at a chapter level for sale without approval of the Chief Executive Officer, who will, if needed, consult with the Member Services Chair.

Local chapters may use the logo only when the chapter name is also listed under the logo. National will not allow chapters to create their own logo and are only allowed to use those chapter logos created by National NARPM, and to grandfather in those chapters who already have their own logos.

Trademarks

The registered trademark must be used for RMP, MPM, CRMC, and NARPM.

The full name of the association is trademarked, NARPM, NARPM in the house is trademarked, and CRMC, RMP, and MPM not in the house are trademarked.

#### Official Color

The standard preferred NARPM color is PMS #201. See attached NARPM Style Manual at the end of these policies.

### B. Communications

#### 1. External Marketing

Communications functions will include press releases, promoting NARPM to renters and owners, as well as member interviews.

#### 2. Discussion Board

NARPM offers discussion boards for members. One is for general property managers and the second is for Brokers, Owners, and Company Decision makers.

Members who promote their affiliated businesses on the discussion board or discuss fees and other potential antitrust issues will receive one warning. If the violation should occur again, members are to be removed for 6 months from the service.

Members must disclose on the discussion board anytime they have an affiliation with the business being discussed.

The following applies to and is published for users of the discussion boards:

Reminder: Do not sell or promote any products and/or services on this discussion board. You are not allowed to discuss management fees, leasing fees, rental rates, or any other charges/fees as that could lead to a federal Anti-trust investigation and possible violation. Speaking poorly about another member, profanity, self-promotion, disparaging a vendor's products, or similar based abuse will not be accepted. NARPM expects anytime you have an affiliation with the business being discussed, the member must disclose that on the discussion board. Violations of this policy will result in one warning and if it occurs again it will result in removal for 6 months from the service.

Reminder, violation of the Sherman Act is a felony punishable by a fine of up to \$10 million for corporations, and a fine of up to \$350,000 or 3 years imprisonment (or both) for individuals. NARPM does not set any rates, or fix prices, for services in the industry. NARPM does not want it to be perceived that members are setting fees.

#### 3. Publications

All committees producing or publishing any NARPM materials showing the NARPM logo, brand, graphics or themes are requested to submit those materials for approval, prior to production or publication to the NARPM staff so that all materials will be appropriately uniform, consistent and coordinated.

##### a. News magazine – The Residential Resource

The older Resource articles (1+ year) will be placed in the public section of the website and not behind members-only login.

##### a. Publication Schedule

The Residential Resource will be issued 11 times a year, with one being a combined issue. Members will receive the magazine electronically unless they request a mailed copy. The ideal mailing date for printed issues is around the middle of the month, one (1) month prior to the issue month so that the issue arrives in the mail sometime in the first week of the issue month. The printing process takes about a week and bulk rate mailing takes up to two (2) weeks.

See the Residential Resource Production Schedule or the Critical Dates Calendar for deadlines, proof and mail dates. Dates may be modified as necessary to meet publication distribution deadlines.

##### b. Submission of materials

Most communication regarding the Residential Resource will be via e-mail and electronic file transfer. The ideal form for submitting materials is an MS Word attachment to an e-mail. Contributors should be

reminded to include their byline and brief bio within the document. Photographs should be clean original or an electronic photo as long as the resolution is 300 dpi or better and a JPG or TIF file format.

In each issue of the Residential Resource Affiliate Members are to be listed (names only) and categorized by service.

c. Responsibilities of Communications Chair

The Communications Committee Residential Resource Sub-Chair is responsible for content proofing, giving most attention to accuracy, appropriateness, clarity, readability, and timeliness. National is responsible for layout, basic spelling, grammar and syntax.

Once the issue is in draft form, the Communications Chair, NARPM communications staff, the Chief Executive Officer and Administrative Assistant will review it, as well as other members of the Communications Committee as requested.

C. Advertising

1. Rates are established annually through the budgeting process.

a. Guidelines

Advertisers may not purchase more than one (1) full page advertisement per issue unless it is an approved double page spread. No cancellations are accepted after the closing date. No agency commissions are paid, or cash discounts given. Publisher's limits of liability in event of error will be to publish ad once correctly on which charge will be made, but credit given for the ad in which the error occurred. All advertisements are accepted subject to the policies and approval of NARPM. NARPM reserves the right to withdraw an advertisement at any time without prior notice to the advertiser. Advertisers and advertising agencies assume all liability for advertisements printed (including text, representation, and content) and also assume responsibility for any claims arising there from made against NARPM.

b. Copying

Photocopying of any kind of Residential Resource content is not permitted without permission. NARPM National has a limited inventory of back issues and can print extra copies at a reasonable cost. Electronic copies are available on the website in PDF format.

c. Marketing Brochures

Designation/Education brochure

CRMC brochure

Why You Need a Professional Property Manager brochure.

Why You Need a NARPM Property Manager brochure.

D. Exhibits/Other Presentations

1. NARPM Pull Up Banners

NARPM staff arrange for the all chapters to have their own pull up NARPM banner to be used by the chapter throughout the year.

Member Services Committee will solicit for new members with a one-time discount offering of \$50 if they sign up for membership drives. Local chapters may make a request and can offer same discount to trade shows they participate in that promotes membership.

2. Trade Shows

The number of trade shows in which the NARPM participates is dictated by the budget.

The Management Staff has a checklist of supplies to be shipped to any trade show so nothing is missing upon arrival. The regular items needed are:

Reprint of Residential Resource articles; Membership applications, Education brochures, and other items determined to assist chapter in recruiting members.

Member Services will also support other REALTOR Associations state trade shows by having a grant available to pay the registration fees up to an amount determined in the budget for the booth to assist in promoting NARPM at the events.

An application form is available for chapters to use to receive reimbursement for state organization registration fees.

## VI. MEMBERSHIP

### A. GENERAL POLICIES

1. If a member is no longer managing properties, they are no longer allowed to retain NARPM Professional Membership or appropriate designations.

2. Policies on New Members received in December  
Staff is to process any membership applications received in December and not invoice new members one month of dues. In effect, new member will receive 13 months of dues for the cost of 12. This policy is NOT to be promoted to the membership but rather will be set as an operational policy for staff.

3. Ethics Training  
New Professional Members are required to take the Ethics class within a set time frame (90 days) from joining NARPM. All new members who join NARPM get their first ethics course online at no additional cost and course must be taken within 90 days after joining to retain professional membership.

All new NARPM members have 90 days from joining to complete the mandatory Ethics class. If at the end of the 90 days have not completed the course the members will be suspended. The member will be reactivated at any time during the application year, once the course is completed. If the person has not taken the ethics class during their first year (12 months) of application, they will be terminated and will need to reapply for new membership.

Until the new applicant has completed this course during their first 90 days, these individuals will be called "Conditional Members".

Online Ethics courses will continue to be sent to new members, but the class will not be timed. Members will be able to complete the course at their own pace.

Current Associate members be grandfathered under this member classification and will remain as an Associate until they complete the Ethics course. No other members will be added to this classification.

This policy will remove the "every four year" ethics training requirement that was set before 2021.

NARPM will offer the current Conditional new members the ethics class at no charge for the first 90 days after this policy is adopted.

### 4. Mailing of New Member Packets

The NARPM staff will send new member packets within 15 days of receipt of information. New Member packets are scheduled to be sent a minimum of twice a month.

### 5. Suspension of Membership

Membership can be suspended by the Board of Directors. If suspended, a member shall lose all rights to vote and participate in Association activities.

A member found guilty of violating the Association's Code of Ethics and Standards of Professionalism can be suspended.

### 6. Termination of Membership

Membership can be terminated by the Board of Directors for the reasons identified below and as outlined in the bylaws.

A member may resign at any time by forwarding a letter stating such intent to the President.

A member failing to pay sums due to the Association for more than 60 days past the invoice due date will be terminated

A member found guilty of violating the Association's Code of Ethics and Standards of Professionalism may be terminated (See Code of Ethics Complaint Review Procedures)

If a new member fails to renew after the first year, he/she will remain as an active member from the date he/she joins until a full 12 month period has expired and not removed from the web site membership listing until their 12 months have expired.

#### 7. Reinstatement of Membership

A member can be reinstated to membership in the Association, depending on the reason for suspension or termination, as follows:

A former member may apply for reinstatement to National, provided that the request is received within one (1) year of resignation. All monies due must be paid, as if no break in Membership occurred.

A former member may request reinstatement in a letter to National, provided that all financial indebtedness has been paid, including any other sums that would have been due if there had been no suspension or termination.

A former member wishing to rejoin the Association more than one (1) year after the date of termination must meet the current Membership criteria and reapply for Membership.

### B. CATEGORIES

#### 1. Company Membership

Company membership will be offered to any company that has four (4) members which is a combination of Professional and Support members, with two (2) out of the four (4) being Professional members, and the base fee equaling \$735.00. After the company membership base fee is paid for the initial four members, the dues will be \$100 for each additional Professional Member/Support Staff and \$140 for each additional Associate Member.

Company membership will enable them to transfer memberships to other people in their company. In order to transfer, the company must provide real estate commission (or proof of termination in states where licensing is not required) evidence that the person has left the firm in order to transfer membership.

The Residential Resource magazines will be delivered electronically. If the company wishes to receive print copies they will be limited to 4 (four) copies.

#### 2. Professional Member

Professional Member: A Professional Member shall be an individual actively engaged in the management of residential properties. The individual must follow their specific state regulatory licensing law regarding licensure in performing the duties of a property manager. The professional member will complete 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, but do not hold an active real estate license.

#### 3. Associate Member:

Associate Members are grandfathered and shall be an individual actively engaged in the management of residential properties as an agent for others. The individual must follow their specific state regulatory licensing law regarding licensure in performing the duties of a property manager. An Associate Member cannot hold the RMP and/or MPM designation or hold elective office.

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, but do not hold an active real estate license.

Associate Members will pay annual renewal membership dues at an increased amount equal to the cost of the Ethics Course.

A \$50 discount is given to Professional Members off registration fees for NARPM events.



Associate members may not hold elective office.

Chapters are to adopt same verbiage for associate/conditional new members.

a. Application Procedure

Any applicant may submit a completed application form to the Association. The form shall include information regarding applicant's experience, education, and any other items the Association may require on the form (as revised from time to time).

NARPM staff shall review and approve the information indicated on the application form. Prior to the application information being placed in the membership system, application must contain an email address. If email is not on the application, staff is to contact new member for this information. The MLS ID number will be completed along with the assigned chapter number added to the system. If no chapter is chosen than new member will be placed in at large category. A list of all chapters will be sent to new members in their welcome packet.

When a new member is referred by an existing member that information shall be placed in the membership database as the referring member will receive New Member recruitment points.

Should the application not contain complete information, staff will call the new member and if after two (2) weeks staff has not received appropriate information, a copy of the application will be returned with a letter from the Chief Executive Officer stating what items are needed to complete the process. Original application (along with form of payment) will be kept in file for thirty (30) days after it is returned to applicant. After thirty (30) days, if no response has been received all information will be returned to applicant stating the application process has ceased, with a copy of the letter sent to the member services chair. In the event the missing item is a copy of the applicants real estate license, staff will find website of licensing division to determine if information is available and will use a print out from the website in lieu of a copy of the real estate license.

In the event of a denial, the reason(s) therefore shall be explained in writing to the applicant. No membership shall be denied based upon race, sex, national origin, religion, age, handicap, or familial status.

Any individual whose application is rejected shall have the right to reapply at any time provided that the reasons for denial have been satisfied.

An affirmation of licensing to be included with all new professional and associate member applications and no longer require copy of real estate license to be submitted with membership application. The affirmation states: "Whereas, I wish to hold membership in the National Association of Residential Property Managers. Whereas, I am actively engaged in the management of residential properties in which I do not have an ownership interest, I do hereby affirm that I fully understand the requirements of the licensing laws of the State of \_\_\_\_\_ and affirm that I am now and will continue to be in compliance with those laws during my membership."

The Member Services Committee shall maintain and monitor membership approval criteria upon approval of the Board of Directors.

b. New Member Processing

An email will be sent to all new members informing them of the Ethics Course requirement as a condition of their membership. Should the member not complete the course within 90 days of application they will remain an Associate Member. Effective 2021 their membership will be suspended until they complete the Ethics Course. If this does not happen during their first year anniversary, they will need to reapply and membership is reset to the new application date.

If a previous member rejoins and more than one (1) year has lapsed, the member will be treated as a new member.

National will provide an e-mail confirmation to the Chapter President whenever a chapter is listed on a new member's application along with the NARPM Regional Vice President for their state.

National will forward all leads to the individual chapters for direct contact. Prospective Members are placed on the website for Chapters to use in their marketing efforts.

Prospects are placed in the membership system as a PM but placed as a W status

Convention Mailing: Will include prospects in all mailings for convention registration brochure mailings for one (1) year. Prospects will be placed on the website for chapters to be able to access for 12 months by local chapters.

Local chapters are encouraged to submit prospects to National and they will be given the membership status of "Waived" and placed in the respective chapters. The local chapters can then pull their prospects off NARPM.org to do mailings and other solicitation they deem appropriate.

#### 4. Charter

##### a. Definition

Charter Members were the first 100 applicants who qualified for membership.

##### b. Procedures

Benefits, rights, suspensions and termination shall be identical to those specified for Professional Members.

#### 5. Honorary

##### a. Definition

Honorary Membership is given to individuals who have rendered, or continue to render, distinguished service to the Association or the property management profession.

##### b. Procedures

Honorary Members shall pay no dues or other assessments, and shall be eligible to participate in the usual activities of the Association and its committees, but they shall be ineligible to vote or hold office.

#### 6. International

##### a) Definition

An International Member shall be an individual who resides and works outside of the United States in the residential property management industry.

##### b) Procedures

International Members shall be eligible to participate in the usual activities of the Association and its Committees, but they cannot vote or hold office.

International Members are not subject to the Association's Code of Ethics and Standards of Professionalism, unless they hold the RMP or MPM designations.

The processing of International membership shall be the same as that for Professional members.

In the US, licensing may be required, but licensing is currently not required for International members.

#### 7. Support Staff

##### a. Definition

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 their state's regulatory licensing law.

b. Procedures

A Support Staff member does not vote or hold office.

A Support Staff member does not receive a mailed copy of the Residential Resource. They will receive the magazine electronically.

The processing of Support Staff membership shall be the same as that for Professional members.

Support staff receives a certificate, but not a plaque.

A Support Staff member shall pay member prices for all conferences and merchandise.

Support Staff members may only earn or hold the CSS<sup>sm</sup>, certification. Support Staff cannot hold designations.

8. Life

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 bylaws.

9. Affiliate Members

An Affiliate member shall be an individual or business entity providing products, services, or expertise to the residential property management industry.

Affiliates of a local chapter are not required to hold National Membership

a. Benefits

All Affiliate members will receive a listing in the monthly Residential Resource, a listing in the Annual NARPM membership directory, a website listing with web link, receipt of 11 Residential Resource newsletters, and eligibility for Affiliate of the Year award after two (2) consecutive years.

b. New Affiliate Member Processing

New Affiliate member receive a new member packet.

When an Affiliate applies as a business entity that provides products, services, or expertise to the residential property management industry, they must apply for separate membership for each branch office it wishes to participate in NARPM. The employees/contractors who are in the location of the business that holds the affiliate membership will be eligible to participate in NARPM events/functions/committees at member status which will also give them member pricing.

c. Affiliate Code of Conduct

The affiliate code of conduct, and procedures for filing a complaint, can be found in Appendix 20.

d. Affinity Program

NARPM has an affinity/royalty program that is to be sent to any affiliate member who would like to participate. The company desires to use Association's name, logo and membership mailing list in connection with Company's marketing and sale of their services to members of Association and others in the residential property management industry/profession (the "Program"), and Association is willing to permit such use in connection with the Program, in exchange for: (i) an annual royalty to be paid to Association by Company; (ii) maintains an active affiliate membership in NARPM and (iii) certain price discounts on such services to be provided to members of Association.

e. Affiliate Advisory Council

Partner sponsors of NARPM hold an automatic position on the council while they hold this sponsorship level, along with the current Affiliate of the year. If the affiliate of the year is already a sponsor the Chair can request that another affiliate hold a position.

VII. CHAPTERS

(Duties of RVP's as mentioned throughout the P&P can also be performed by the RVP Ambassador)

## Objectives

National members of the Association may join together in local/state chapters serving specific geographic areas. A member may join one or more local chapters. The local/state chapter membership is in addition to the National Association Membership. The objectives of the local/state chapters of the Association shall be to encourage adherence to high standards of professionalism and ethical conduct; to advance the spirit of professional cooperation among the members; to provide opportunities for continuing education in concert with the Association; to increase the recognition and public acceptance of professional property managers; and to advance the interests of residential property managers in the local chapter area.

### 1. New Chapter Application Procedures NARPM Networking Groups and Chapter in Formation

(Adopted April 2020) NARPM works with areas across the country on the formation of “area name” NARPM Networking Groups (NNG), prior to discussion on becoming a Chapter. The NNG will enable a group of members to join to meet and discuss industry issues in their market area, without the requirements placed on a chapter. Each NNG shall have a “Group Leader” who will be responsible for the regularly scheduled meetings. The NNG leader will assign other volunteer positions as needed. These assignments will allow the NNG to find the future leaders. The two (2) group leaders are to attend Chapter Leader training in November.

The NNG can function similarly to a chapter, without the requirements of having a minimum of members, completing chapter compliance, filing for incorporations, tax filings, etc. The NNG shall abide by all antitrust requirements, and other anticompetitive policies. NARPM does not oversee the operations of NNG's and will not be involved in their formation until such a time as they decide to become a Chapter.

The RVP for the area will be limited to approving any chapter grant requests, or other documentation on behalf of the NNG, prior to being submitted to National. Once the NNG has been formed and desires to move forward to a Chapter in Formation, the NNG shall meet with the RVP, or their ambassador, who will assess if the NNG is strong enough to move forward. If it is determined that the NNG has the strength to move forward, the RVP/Ambassador shall be the one to recommend the next step that will be a “Chapter in Formation”.

NARPM encourages the formation of State Chapters to assist local chapters.

Beginning July 1, 2018, local Chapter in Formation can be formed with a minimum of 35 members for the first 6 months and will be required to build membership to 50 members within the following 12 months. Should the chapter not be able to meet the requirement of 50 members, the chapter will be placed in conditional chapter status for an additional 6 months. It is the responsibility of the chapter to obtain good standing within six (6) months.

Chapters in Formations will have access to the “NARPM Chapter Success Guide”. This resource will have 12 sections for CIF leaders to complete during their first 6 months, including:

- A brief history and the Vision and Mission of NARPM
- Overview of NARPM benefits
- Steps to launching a NARPM chapter
- Timeline to launching an NARPM chapter
- How to effectively run a chapter
- Developing the leadership of a chapter
- How to grow a chapter
- Resources and frequently asked questions

The Board of Directors approves requests for Chapter in Formation. National will assign a chapter number, update database and web page by adding the new chapter. The chapters will send National the information on the chapter leader. The President sends a letter of congratulations, inviting the chapter to attend the next Annual Convention. A press release is included in the mailing.

### Separate Incorporation and Functions Required of Chapters

Chapters shall be an incorporated entity formed under state laws and must provide documentation of its status to the National Association. National will assist in coordinating the chapter incorporation paper work, in conjunction with local leaders.

Chapters may charge dues but all billing and accounting must be separate from the National Association billings. A NARPM Chapter will not collect National NARPM dues.

The chapters shall adopt chapter bylaws for their governance which are not in conflict with the bylaws of the National Association. The formation of the local chapter shall be the responsibility of the local chapter members. As a condition of becoming a chapter of NARPM bylaws must be submitted to National.

Chapters must have membership categories consistent with the National Association and Professional members must be National members. Chapters shall be self-governed and shall be responsible for the election of their own officers, holding of periodic chapter meetings (at least four (4) per year), and shall annually be required to submit to NARPM National chapter certification information. Chapters must complete elections as outlined in the Chapter bylaws. These elections are to be completed no later than October.

Chapter Presidents and President-Elects must attend required leadership training sponsored by NARPM National that is held annually. If either leader is unable to attend, NARPM National must be notified. Additional leaders can attend by paying separate registration fees.

## 2. Chapter in Formation

### A. State Chapters

NARPM outlines the policy for the formation of a state chapter in [Appendix 14](#) of this manual. Other members in adjoining states, who do not currently have a chapter, can be members of a State Chapter in Formation.

### B. Chapter Probation Status

All local and state chapters must complete a chapter recertification form annually. These forms will be disseminated from National.

Beginning July 1, 2018, a Local Chapter in Formation can be formed with a minimum of 35 members for the first 6 months and will be required to build membership to 50 members within the following 12 months. Should the chapter not be able to meet the requirement of 50 members, the chapter will be placed in conditional chapter status for an additional 6 months. It is the responsibility of the chapter to obtain good standing within six (6) months.

When the membership of a local chapter falls below required number of members (the Association shall notify the President and Secretary of the local chapter. In the event such membership remains below the required minimum for a period of six (6) months from notification date, and upon approval of the National Board of Directors, the Member Services Committee shall authorize the Secretary of the National Association to issue a notice of probation to the officers of the local chapter. Upon receipt of the notice of probation, the local chapter shall have a period of six (6) months to restore the membership to the minimum level for a chapter. (Follow chapter in formation requirements). Those chapters that were formed prior to January 1, 2016, are grandfathered to allow them to retain a minimum of 10 members.

If the required membership is not restored and the chapter ceases to be a local chapter, the members may either join another local chapter or shall remain as independent, at-large members of the National Association. The members of National shall retain their membership rights, privileges, benefits, or obligations as a result of the chapter ceasing operations.

### C. Chapter Recertification

The certification requirements were developed to maintain fair, specific procedural standards for the Chapters and to protect the legal accountability of the Association. The NARPM Board of Directors determines each Chapter's recertification status after consideration of recommendations submitted by the Regional Vice President, staff, and the Member Services Committee.

In order to receive recertification, local Chapter Presidents, or their designee, must participate in a minimum of two of the quarterly regional conference calls.

Levels of Recertification: The levels of recertification are:

### 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 to the chapter leader.

### Chapter in Review (Amended)

Should the Chapter submittal display 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 condition 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.

A timeline was established to deal with chapter certification:

December 1 - DEADLINE to submit Chapter Compliance Certification to NARPM staff. Chapter not in compliance list sent to RVP's.

February 1 - March 30 – RVP works with NARPM staff to get chapter certifications completed and turned in. Updated list of chapters not in compliance sent to RVP's regularly.

### **Beginning of April, a list of chapters not in compliance included in Highlights to members**

Beginning of May Email from President to members of all chapters who have not responded to Chapter certification notifying them the chapter is on Chapter in Review status.

June Board Meeting Chapters are decertified, and all members are notified by email with a list of all current NARPM chapters and they are placed as at-large Members until such time they choose another chapter.

### D. Chapter Success Guide

The online Chapter Success Guide should contain a planning guide and worksheet, information about how to use the chapter website and online reports, certification information, a chapter grant application, a Chapter Excellence Award Application, sample marketing brochures, ten (10) current membership applications, and a Guideline for RMP/MPM Course” and posted on the NARPM.org website.

### E. Database

Chapter database is accessible through the NARPM web site by chapter leaders and through the individual chapter web site. Chapter leaders should routinely update member information within their chapter, with confirmation received from National.

### F. Chapter Name Changes

Chapters must immediately notify National of proposed chapter name changes. National must approve said name change. Chapters shall also ensure that all necessary corporate documents are modified. All expenses related to name changes will be incurred by the Chapter.

### G. Formation of New Chapters versus Chapter reformation

A Chapter who has been decertified can ask to be recolonized using their former articles of incorporation. The Chapter is responsible for bringing articles up to date and using current model bylaws for Chapters.

A Chapter that has been dissolved can request the Board of Directors to be recolonized by restarting as a Chapter in Formation with form completed by thirty-five (35) active NARPM members and by following the outline for Recolonizing Chapters.

#### H. Chapter Startup/Struggling Chapters/ Recolonizing Chapters

##### Chapter Start-Up

Work with NARPM volunteers in the area to find an email list that National staff can use to obtain a list of prospects for the area/state.

National staff will draft an email to go out to the data base with a link to a survey that will obtain the respondents name and pertinent information.

Staff will gather information from this survey and place respondents in member database as a prospective member for the prospective chapter. This will give the volunteers a list to start with for their first meeting.

Staff will assist volunteers in creating a flier for their upcoming formation meeting. Staff will do an e-blast to the prospective members in the database and all members in the state where the Chapter will be starting up.

Staff will mail to the volunteers all information that is needed for their meeting to promote NARPM. Volunteers may request additional information if needed.

At the chapter formation meeting it must be determined if it is viable to start a chapter and if so fill out a chapter charter request. NARPM staff will present the request to the board of directors and if approved, staff will work with the volunteers to get bylaws, articles of incorporation, and tax ID through an online service.

Chapter leaders will be responsible for filling out the chapter planning worksheet.

A Chapter in Formation can be formed with a minimum of 35 members for the first 6 months and will be required to build membership to 50 members within the following 12 months. Should the chapter not be able to meet the requirement of 50 members, the chapter will be placed in a conditional membership status for an additional 6 months. The Regional Vice President and Chapter Support Manager will work with the Chapter to assist in getting the chapter in good standing.

National Staff and RVP to keep in bi-weekly contact with volunteers to ensure they are meeting the necessary goals and have scheduled a follow up meeting. Their first meeting will require approval of the chapter bylaws.

#### I. Struggling Chapter Mentor Program

##### Struggling and Recolonizing Chapters

The RVP and Chapter Support Manager can easily identify strong Chapters, but it is more difficult to identify weak Chapters. One way to identify a weak group is through the completion of Chapter Compliance, as those who have difficulty filling out documents, or are unable to submit completed information, are to be noted as struggling Chapters; the second way to identify struggling Chapters is via the RVP meetings with help of the Chapter Support Manager and the RVP team members.

As soon as a struggling/weak Chapter is found, the Chapter Support Manager, and/or Chief Executive Officer, is to notify the RVP who will contact the Chapter's leadership and see what type of assistance is needed. RVP and Chapter Support Manager (staff) should identify a strong Chapter that is close in proximity that can assist this Chapter. If there is no strong Chapter nearby, the RVP may assign one of their team members to assist in this process in lieu of a Chapter. If this process is used, the team member will be used throughout this policy in lieu of the mentee Chapter. Once this is done, the RVP should contact the strong Chapter leadership (or RVP team member) to inquire into their assistance. Should they agree, the RVP and a person from that Chapter will arrange a meeting with the struggling Chapter leadership.

Ask leaders (and members) of the weak Chapter to attend one or two general meetings and/or special events of the mentoring Chapter each year if possible. Should the Chapters be in close proximity, plan one or two joint meetings with the mentor Chapter as the host.

Both Chapters should report on what is happening and answer the following:

- Which Chapters have agreed to mentor which weaker Chapters/ Identify mentor/mentee Chapter and the leader to accompany the RVP?
- What meetings of the mentoring Chapter has the weaker Chapter attended (type/ date)?
- What meeting dates will a leader from the mentor Chapter attend of the mentee Chapter? Make sure this date is shared with the RVP so they can schedule a visit also.
- Help determine if the mentee Chapter has strong leadership in place and has the planning calendar outlined. Include in calendar when the Chapter and board meetings will be held, along with a location.
- The RVP or mentor should observe at least one of the mentee Chapter board meetings to make sure the leadership is effectively running the board and Chapter meetings, as well as reviewing the duties of the executive committee, to ensure proper delegation and follow through of each chairs assigned tasks. The RVP/Chapter Support Manager should request copies of minutes from Board Meetings to assure they are being kept properly.
- Bring in guest speakers and use grant money to help build membership.

Mentor Chapter leader, RVP, and Chapter Support Manager must stay in constant contact with the mentee Chapter on a monthly basis. Arrange conference calls to review the progress of the Chapter in growing their membership.

Encourage Chapters to hold events that will draw in REALTORS from local associations. Look at joining the local REALTORS Association as an affiliate member, Chapter grant money can be used for this also.

A chapter can apply for as many grants as approved in the annual budget and as dictated on application forms.

Use the special advertising grant money to help advertise Chapter and upcoming meetings.

Make sure Chapter has a Chapter website through NARPM. Contact Chapter Support Manager for more information.

An important part of this process is to find strong leadership to carry the Chapter. If a weak leader is in place get someone strong to follow them at the end of the year (President-Elect) and get the weak leader out as soon as possible. It is imperative to find additional leadership to assist the struggling current leadership and help them finish the year as strongly as possible, find other members/mentors and neighboring Chapter leaders/ national leaders.

Encourage struggling Chapter to hold and advertise a local membership drive. The more members a Chapter has in place, the better the pool to choose future leaders.

Chapters who are recolonizing must become a "Chapter in formation" for a minimum of six (6) months to prove they can keep the Chapter together and provide services to the members. Within one year, 50 members to retain full chapter status.

Those chapters that were formed prior to January 1, 2016, shall be grandfathered to allow them to retain a minimum of 10 members.

#### J. Chapter Incentives

NARPM will annually pay Chapters an incentive for their assistance in retaining the members of the organization. The Chapters also must meet the minimum level of compliance annually. All the following MUST be accomplished to receive the incentive:

- Must have at least a 90% retention rate of dues paying members in the chapter by the end of the dues billing cycle for that year. This rate will include new and renewing members from April 1 previous year to March 31 current year.



- To have uploaded Chapter Compliance documentation by deadline. Have received full Chapter Compliance for the year (Conditional Compliance does not satisfy requirement.)
- Have received full Chapter Compliance for the year (Conditional Compliance does not satisfy requirement. Excludes those who are waiting for the pending 501 c-6 IRS classification approval)

The staff will follow up on those chapters with no tax documents in the chapter compliance upload to assure there are no issues with their 501 C-6 status and copy the respective RVP.

No payments will be sent to chapters until after the Board has confirmed the chapters who are receiving incentives.

## VIII. Awards and Recognition

### A. Rocky Maxwell New Member Achievement Award

The Rocky Maxwell New Member Achievement Award is awarded annually at the convention to a new NARPM member who has shown outstanding leadership in their chapter during the first 18 months of membership (January through June the following year). Nominations are solicited from the Chapter leaders and the President selects the recipient. A Past President will be selected to present the award at the annual convention. It is preferred that this person had personal knowledge of Rocky Maxwell so they can share his background and impact on NARPM with recipient. The President, President-Elect, and Member Services Chair will review applications and choose winner.

### B. Affiliate Member of the Year Award

The Affiliate Member of the Year Award is awarded annually at the National Convention to two (2) outstanding Affiliate Members – a member who goes above and beyond when it comes to providing benefits and service to the NARPM membership. Nominations are solicited from the Chapter Leaders and Convention Committee. The Executive Committee will make final selection of the Affiliate of the year from those nominated.

Criteria for Affiliate Member of the Year:

1. Being an Affiliate member from date of membership 24 months or longer.
2. Must be a paid current Affiliate member for this year in good standing.
3. Attended at least one NARPM event during their membership i.e. local chapter event, regional, state, National etc.

### C. Outgoing Board Plaques

Plaques are given to each outgoing Board member at the Annual Convention or another appropriate NARPM gathering. The plaque will detail any offices or committee Chairmanships that the Board member held. Outgoing Board members are to verify information on the plaque prior to it being printed.

### D. President's Award

At the option of the President, and upon their choice, a President's Award may be presented at the Annual Convention for outstanding service that assisted the President throughout their year of service.

### E. Volunteer of the Year

Up to three (3) may be presented at the Annual Convention for outstanding service to the Association or any of its functions by and outstanding Volunteer to the organization.

### F. Chapter and New Chapter of the Year Award

The Chapter of the Year Awards are awarded annually at the convention to the Chapters who receive the most points on the Chapter Excellence Award application.

The New Chapter of the Year Award is awarded annually at the convention to the new Chapter (first 18 months of Chapter status) that has submitted the highest Chapter Excellence Award application points for any new chapters who applied,

## G. Chapter Excellence Awards

### 1. Presentation

Chapter Excellence Awards/Chapter of the Year, will be presented at the Annual Convention or another appropriate NARPM gathering.

#### Qualifications

Award qualifications include, but are not limited to, points for chapter meetings, points for local newsletter, points for local trade shows/conferences and points for members with CRMC designations. The timeline is to run the calendar year and due June 1.

#### Amendments

Any future changes to Chapter Excellence must be made by the end of October for the following award year. These changes will be presented to Chapter Leaders at the Chapter Leadership Training session.

## H. Anniversary Service Pins

Each NARPM Professional, Associate, and Support Staff member upon request, will receive an anniversary service pin for each five (5) continuous years of membership in NARPM. 20 and 25 year Anniversary pins and certificates earned that calendar year will be distributed at the annual convention to members in attendance.

## I. RECORDS AND COMMUNICATIONS

### A. Web site

#### ▪ Publications

The newsletter is to be available on the web site, as well as several other property related forms.

#### ▪ E-mails

Blast e-mails from the web site are available for chapter leaders' use.

#### ▪ Logos

NARPM logos are to be available on the web site in downloadable form. Any nonmember found using logo will be sent a cease and desist letter to stop logo use.

#### ▪ Job Board

The website hosts a job board that is of free use to the NARPM Members. Non-members are allowed to post listings for a fee of \$150/listing. Management staff would be needed to input the job listing since non-members have no access to list. Non-members can view availability.

#### • Review of Advertising

Advertising should be reviewed by the Communications Committee Chair, and at the discretion of the Communication Committee Chair, in consultation with the Chief Executive Officer, the advertiser may have their ad removed and be given the opportunity to provide an updated ad. This should only occur in cases where the advertising is misleading, illegal, or inappropriate.

#### • Precedence of Advertising

In cases where there are more advertisers than space available, precedence should always be given to NARPM Affiliate members, based on Affiliate level. The staff should consult with the Communications Committee Chair if a case arises where an Affiliate is attempting to monopolize advertising space, at which point the staff may, at its discretion, reduce the advertising space allotted to any single advertiser and report reason to the Communications Chairs.

#### • Non-Affiliate Advertising

Non-affiliates who serve the property management industry should always be encouraged to join NARPM as Affiliates. When these companies request the opportunity to advertise on the NARPM web site, it provides NARPM with a great opportunity to recruit them as Affiliate members.

From time to time, a party may be interested in advertising on the NARPM web site, but not be an ideal candidate for Affiliate membership. This occurs in cases of property management conferences, books, and the like. These are typically one (1) time advertisers, who do not have an ongoing interest in marketing to our audience, but do have the need to reach our membership with a single message.

In these cases, these companies should be able to advertise at the discretion of the CEO or COO.

## B. Linking Policy

NARPM understands the value of shared information, and the efficiencies that the Internet brings to the sharing of information as website content. Our linking policy describes the fashion in which we permit and encourage linking between other websites and our own.

- Inbound Links

NARPM encourages other websites to link to any of our public pages.

These links must be clearly attributed to NARPM as an outside and unrelated source. Linking websites must respect the content coming from the NARPM website and must not plagiarize that content.

Sites that are adult, gambling, or illegal in nature must not link to any page on any NARPM website. NARPM will generally not pay for a link to our site, but may consider such opportunities on a case-by-case basis.

In no case shall the NARPM site be framed by another site, without express consent of NARPM.

- Outbound Links

NARPM may link to an outside third party whose content is deemed valuable for NARPM members or web site visitors.

Outbound links will not knowingly violate any site's linking policy.

Outbound links will be constructed so as to make it obvious the content is coming from an outside website.

Outbound links will generally be placed in our Industry Links section, but may be on any page of our website, public or private.

NARPM will generally not pay for a link to another site, but may consider such opportunities on a case-by-case basis.

- Reciprocal Links

NARPM may be amenable to linking to other sites in exchange for a link to our web site.

Both sides of the reciprocal link must be in line with our linking policy. Opportunities to engage in reciprocal linking will be evaluated on a case-by-case basis.

- Committee Responsibilities

Committee Chairs need to review the web site to change or add content and should e-mail the NARPM staff for any changes/comments. Each committee should have a representative to review discussion boards to make sure answers are given to questions.

All updates to committee pages are made by the NARPM Staff.

- Database

National will maintain the membership database. The database will be uploaded daily to the NARPM website.

## C. Membership Communications

### 1. Notification of Deaths

Individuals	Form of Acknowledgement (Responsible Party)
Current Board of Directors or member of their immediate family (spouse/significant other, children)	Chief Executive Officer to: Card from President and Board of Directors sent to address on file. Flowers from the Board of Directors (or \$100 donation to charity, if preferred by family)
AND	

Past Presidents or members of their immediate family (spouse/significant other, children)	On death of current President or Past President announcement email to entire membership. Current Directors and officers sent announcement email to board of directors and members in their respective regions. Announcement of Board members or Past Presidents passing written for Residential Resource by representative in their chapters
Current Committee Chairs or Chapter Presidents	Card from President and Board of Directors sent to address on file. Staff to send Announcement sent to Board of Directors and members in their respective regions. Staff to send
Previous three years members of board of directors or their immediate family (spouse/significant other, children)	Card from President and Board of Directors sent to address on file. Staff to send Announcement sent to Board of Directors. Staff to send
Natural or man-made disasters	Sympathy/support email to area members and if support is needed to entire membership. Staff to send

This policy does not preclude the need to acknowledge deaths of other key volunteers not reflected in the above grid. Those occasional situations will be dealt with at the discretion of the President and the Chief Executive Officer. When notified of members passing a brief condolence will be placed in the next Residential Resource upon verified notice of the death of a state or local Officer or Director or a past National leader.

#### D. Records

##### 1. Storage

National will be responsible for storage of all records. If the rental of an offsite protected storage facility is necessary, it will be at NARPM expense.

##### 2. Authority

The Board of Directors shall have the authority to determine which historical items and records should be kept and which discarded.

**Appendix 1 Duties for Transition plan to include but not limited to:**

Existing contracts

Signed by Management Company on behalf of NARPM

Originals turned over to the NARPM attorney.

NARPM to inform all members of the change in management.

NARPM supplies. Store, manuals, trade show booth, and all other materials to be packed and shipped to a location provided by NARPM within a time as agreed to by all parties.

Toll free number

NARPM to pay for re-connect of line at a new location.

Management Company to answer number until such re-connect can be accomplished.

Management Company to route questions and inquiries to the person assigned by NARPM.

Membership Inquiries

Membership packets to be sent during transition period with update on membership numbers sent to President and Member Services Chair.

Information on new members to be given to the Member Services Chair for follow-up.

Education Classes

Chapters requesting classes shall be forwarded to Professional Development Chair

Class materials to be shipped by Management Company until end of transition period. Professional Development Chair to be made aware of class schedule.

Designation Inquiries/Packets

Management Company to forward to Professional Development Chair.

Funds received with applications to be deposited in NARPM bank account as usual.

Membership records

Management Company to provide electronic back up of all member records and history in their database

Management Company to arrange with NARPM volunteer to back up all electronic documents and files and arrange where to send information

Management Company to pack up and label all membership files, and corporate files, as per the record retention policy

Accounting

Bills to be paid and deposits made of incoming funds during transition period by Management Company with approval of NARPM treasurer

Management Company to have accounts audited by a CPA approved by the NARPM Board of Directors as part of the close out

Certificates of Deposit to be delivered to the NARPM attorney within 30 days with a list containing numbers, amounts, due dates, and banking institution

New bank account to be opened by NARPM with transfer of funds (minus outstanding checks) to occur on or before the last day of the transition period

Return of NARPM property by Management Company.

Within ten (10) business days, or such earlier date as the parties may agree, following termination of the Management Agreement for any reason by either party, Management company shall perform its obligations under their Agreement, shall cause an audit of the NARPM books to be conducted at the expense of NARPM, shall fully cooperate in the transition of management, including the return to NARPM or any third party designated by NARPM, of all NARPM records, documents, and materials.

NARPM shall remain liable to compensate Management Group for normal expenses and fees.

Management Company shall take whatever actions are necessary to remove Management Company, or any representative, contractor, or employee thereof, from any bank accounts opened in the name of NARPM name or behalf, and to transfer such accounts to NARPM.

Management Company will cooperate fully with NARPM, and any authorized representative thereof, to take whatever other actions are necessary in order to provide for a smooth and orderly termination and transition.

Intellectual and Creative Property Rights.

NARPM maintains ownership of any and all intellectual property for which it pays either Management Group or outside vendors to produce. Management Company probably owns intellectual property it has used or acquired from its own funds; however, NARPM shall have a non-exclusive, royalty-free license to use such property during the term of this Agreement.

NARPM website is solely owned by the organization, and the Management Company will, if hosted on their servers, forward website and all documentation to approved third party.

**Appendix 2 AMC RFP Timeline**

AMC RFP Timeline

Done	RFP Process	Timing/Due By	Accompanying Notes and Responsibility
	If needed, Termination Call to management company		NARPM
	President to send written cancellation document to management company and immediately appoint an Ad Hoc to being search for new AMC		NARPM
	RFP Document Completion		Ad Hoc and EC
	RFP Final Review		Ad Hoc and EC
	Approve Final RFP		Ad Hoc and EC
	Send out RFPs to bidders		Ad Hoc to establish date to send out RFP
	Bidders e-mail questions		Ad Hoc to establish date for bidder questions
	Bidder Conference Call		One hour maximum
	Bids Due		Set due date
	Preliminary Bid Review		Ad Hoc performs first cut; Final three bidders will be chosen
	Schedule bidder interviews		Ad Hoc holds phone calls to final three bidders setting up interview/conference call
	Bidder interviews completed		Ad Hoc to review interviews with EC
	Final Decision		Conference call with Board
	Announce Bid Winner		Ad Hoc Chair to make phone calls to final three bidders with thank you letter following
	Contract Negotiation/Signing		Ad Hoc and EC to review and signing of AMC/NARPM Agreements
	Cutover to New AMC		Transition work group or current Ad Hoc to work with new AMC
	Notification to Membership		Notification in Newsletter
AMC RFP Timeline			

### **Appendix 3 Scope of Services for Association Management:**

Management Company will be in charge of, but not limited to:

Updated 9/23/2020

#### **General Management Services**

- Deliver customer service and answer the NARPM 800 phone number from 8:30 a.m. until 6:30 p.m. eastern time.
- Handle a substantial volume of phone calls asking general NARPM questions.
- Maintain the NARPM community which gives members the ability to reach the management team.
- Continue to enhance many of the services that NARPM has been offering, such as magazines, websites, email system, designation program, and the Affinity program with several affiliates who pay NARPM significant royalty income.
- Continue to provide healthcare program for members, both independent contractor and company coverage.
- Host webinars offered by NARPM Partners. These webinars are recorded and posted on NARPM.org behind Members Only.
- Provide staff support to cover all committee meetings per year.
- Handle the media inquiries.
- Maintain, NARPM Discussion Group on Facebook, NARPM Governmental Affairs Discussion Group on Facebook and other social media portals.
- Provide office equipment and licenses to perform daily functions.
- Survey membership annually on a variety of demographics parameters.
- Annually survey chapter leaders, committee chairs, and board members to evaluate overall operations of NARPM and OMG performance.
- Update the NARPM policy and procedures manual from motions made by board of directors and committee action.
- Track all motions in a spreadsheet for easy reference by directors on previous actions taken by the board.
- Check faxes throughout the day.
- Process mail daily.
- Consult monthly with committees in accomplishing the NARPM Strategic Plan.
- Work with Chairs to set agendas for meetings
- Compile notes at the end of each meeting and send to members
- Report on agenda items as needed
- Work on projects for the committees
- Report to management team on actions of committees to ensure there are no duplications.
- Volunteers provide NARPM with the “what” needs to be done and staff provides the “how” to get it done and reports back to the volunteers.

#### **Accounting**

- Prepare dues collection that involves both paper and electronic invoicing, depending on how members prefer to receive their notices.
- Send email reminders weekly during the month of December to members who have not paid.
- Prepare and send second and third default notices.
- Mail paper invoices to all who have not taken advantage of the discount after the January early-bird deadline.
- Mail postcards to those who failed to pay their dues.
- Send renewal packets to those who paid; packets include a thank you letter and window-cling membership decal.
- Prepare reconciliation reports to determine if correct dues are being paid.
- Deposit dues payments at a local bank within one business day following receipt.
- Compile monthly financial statements and other reports for the Finance Committee and Board of Directors.
- Administer all NARPM banking relationships and investment accounts, including setup, closure, approved fund transfers, annual signature cards, and annual resolution changes.
- Maintain the AP Automation system
- Submit invoices weekly for approval by NARPM Treasurer.



- Process payment and make online payments to vendors.
- Oversee the daily batching of payments processed by OMG.
- Work in Microsoft Dynamics GP accounting software.
- Monitor and oversee all accounting policies as approved by NARPM and as required by OMG's accreditation.
- Assist in the year-end annual financial statement Review/Audit, 990, and tax return preparation by external CPA.
- Submit annual state registration report to the state of Virginia to ensure that NARPM is in corporate compliance.
- Manage Merchant Processing relationships and partnership.
- Oversee NARPM insurance policies and broker relationship.
- File monthly Sales & Use Tax Reports.
- Prepare recurring FEC PAC filings- Quarterly, Pre- & Post-Election reports to ensure that NARPM follows Federal Guidelines.
- Consult with outside attorney to ensure that NARPM follows the FEC guidelines when operating PAC.
- Work with Finance Committee to oversee NARPM Reserve Investments.
- When needed, facilitate Investment RFP process to analyze and select investment advisors who will follow and satisfy the NARPM investment policies.

#### Chapter Support

- Constantly assist in supporting the NARPM state and local chapters as needed by the Regional Vice Presidents and the Chapter Presidents.
- Solicit Chapter reports from Chapter Leaders.
- Constant communication of updates and important information is shared to Chapters.
- Organize the annual Chapter Excellence Awards program for the Chapters.
- Oversee the 501(c)(6) IRS application process for new Chapters.
- Oversee the Chapter compliance program for NARPM to strengthen Chapters and help NARPM Leadership monitor them.
- Publish and update the Chapter Success Guide.
- Organize the Chapter Leadership training for the Chapter Presidents and President Elects.
- Assist RVP's in determining Chapters' needs and getting tools to help them succeed.

#### Communications, Public Relations, and Graphic Design

- Produce NARPM Radio podcast series to educate, inform, and promote membership and the industry.
- Distribute regular e-newsletter to all members, including affiliates, to update and inform of NARPM events and opportunities.
- Update and maintain content on organization's main website.
- Update and maintain content on two microsites – Annual Convention and Trade Show and Broker/Owner Conference & Expo.
- Oversee the Chapter websites with outside web developer.
- Administer the Job Board on NARPM.org.
- Produce the bi-monthly e-newsletter to members
  - Collect and curate content as appropriate.
  - Format the design and layout.
  - Timing subject to change.
- Publish weekly e-updates members on news and events.
  - Timing subject to change.
- Coordinate Advertising and Marketing.
  - Design and publish the annual Advertising Opportunities booklet with specs and deadlines for all advertising vehicles.
    - Design and post the annual Advertising Contract. Update as items are sold out.
    - Coordinate sales with NARPM Independent Advertising Rep and other advertising companies.
  - Design and publish Residential Resource magazine 11 times per year.
  - Work with NARPM Communications and Technology Committees on technology and other needs as they arise.
  - Produce education template fliers for Chapter use.

- Design all event graphics, coordinate print production, post on website, and distribute through all channels.
- Design renewal mail with fulfillment.
- Design marketing brochures and flyers.
- If needed, design Chapter retractable displays.
- Oversee the branding of NARPM. Update branding manual as necessary.
- Design logos for Chapters' use.
- Prepare and distribute press releases, including interviews with leadership.
- Arrange media interviews with NARPM leadership.
- Design postings to NARPM social media.
- Coordinate NARPM sponsorship with other organizations.
- Coordinate FTP storage for Education instructor course files.
- Use email system to improve the open rate in emails. Research and evaluate new communication system for members to improve the open rate of e-newsletters.
- Provide articles from NARPM to other publications upon request.

#### Convention and Event Services

- Plan stellar NARPM events.
  - Broker/Owner Conference & Expo in spring.
  - Annual NARPM Convention and Trade Show in fall.
  - Capitol Summit in beginning of the year.
- Coordinate logistics for all NARPM meetings and events.
- Maintain affiliate relations (mailing lists, marketing, follow-up, etc.). Point of contact for all the exhibitors, sponsors, and exhibit decorator
- Work to secure sponsors for all NARPM events and webinars.
- Handle all aspects of working with the hotel and other meeting facilities. This includes: Site Inspections, Making Recommendations, and Negotiating Contracts.
- Work closely with CEO in preparing a proposed budget for the Capitol Summit, Annual Convention and the Broker/Owner Conference & Expo
- Oversee registration processing for all NARPM events.
- Manage the exhibit area and vendor relations on-site.
- Assist in the drafting of all promotional and marketing efforts, as well as the on-site program.
- Compile attendee materials and name badges for all in-person events.
- Staff on-site registration.
- Prepare thank you letters as needed.
- Perform the qualitative and financial evaluations after meetings.
- Conduct Pre-event management and committee meetings as needed.
- Handle all Post-event management details.
- Handle the invoicing, registration, and posting of money for the Past Presidents Golf Outing.
- Lead the pre-event site visits for President-Elect, Convention Chair, CEO, and meeting planners.
- Handle all of the event details and work with volunteers to set up programming/speaker selections
- Maintain the music license from ASCAP and BMI to ensure all National events have proper coverage.

#### Designation Programs

- Answer member inquiries regarding designations.
- Process designation applications.
- Contact the candidate to assist with application process.
- Accept letters of reference.
- Send tentative approval emails to all candidates.
- Forward the designation packet to an approved designation auditor.
- Send final approval notification to each candidate, their chapter president, and RVP.
- Send final letter and plaque to the candidate.
- Prepare designation plaques and designation pledge.
- Compile all names for presentation at National Convention.
- Publish approved candidates in the Residential Resource.

- Participate in meetings with Committee Chair to review issues and concerns and to assist in drafting of agenda before committee calls.
- Assist with the search for designation auditors.
- Collect auditor confidentiality agreements and auditor agreements.
- Schedule and facilitate new mentor training on the upload process.

#### Education Services

- Provide staff support to a rapidly growing education program.
- Handle education classes, designation programs, new certifications, and instructors.
- Plan, organize, promote, and coordinate educational programs.
- Handle registration for courses.
- Provide course completion certificates.
- Update database with attendance information.
- Assist in promotion of courses and designations through fliers and websites.
- Send e-blasts to assist in promotion.
- Perform post-course wrap-up and evaluations.
- Process all class registrations or refunds.
- Complete reimbursement co-sponsorship forms; submit for approval.
- Provide online course/event registration.
- Work on course updates and rewrites.
- Provide an online Ethics course through the distance learning system for all new members to complete their requirement free of charge within 90 days.
  - Secure a NARPM National Instructor to teach the courses.
  - Order student materials, exams, and surveys prior to course, as needed for courses held at National events.
  - Send all other materials; survey, pencils, NARPM marketing materials for events and other courses, sign-in sheets, registration reports, and rosters.
  - E-mail updated sign-in sheet, registration reports, and rosters on the day before the course.
  - Process Instructor expense reports.
  - Process surveys.
  - E-mail Certificates of Completion or failure notices.
- Work with Instructors so that they are using the most up-to-date course presentations in the classes they are teaching.
- Recommend policies and procedures changes for the Professional Development committee to consider.
- Work with Members taking online courses and classroom courses.
- Coordinate and implement details for Instructor training to be held annually.
- Manage all aspects of the Virtual Education series.

#### Executive Management

- Communicate with Board providing updates on financials, dues, publications, actions implemented, committees, events, and other matters.
- Coordinate, manage, and monitor work of other OMG staff on NARPM projects.
- Coordinate Board of Directors meeting logistics with the Meeting Planner.
- Confirm reservations and travel for Board meetings, Strategic Planning & Instructor Training.
- Attend all meetings of the Board, NARPM Conventions, state chapters, and other leadership events.
- Make presentations at state and chapter events as requested.
- Work closely with volunteers to create NARPM membership marketing and retention plan.
- Proof, compile, and electronically link agenda, minutes, and supporting documents for the NARPM Board of Directors.
- Work closely with the President to assure that committee chairs are staying on task to get action items accomplished.
- Oversee the other NARPM projects implemented by OMG.
- Assist in the planning, coordinating, and facilitating the Board Retreat.
  - Work with the President-Elect to choose topics, speakers, format, and location.
  - Work with the President-Elect to plan the agenda.
- Attend January ASAE leadership training with President and President-Elect.

- Participate in PAC conference call meetings.
- Participate in Strategic Planning Committee; two meetings, two days.
- Bi-weekly conference call with President and President-Elect.
- Support NARPM chapters and assist their leaders.
- Handle Professional Standards process from receiving complaints, staffing hearings, reporting to board of directors, and finally through the appeal process.
- Communicate directly with Legal Counsel as needed.
- Work with attorney to ensure that the NARPM Code of Ethics is reviewed and in compliance.
- Assure that all policies, procedures, bylaws, and other activities are reviewed by either the corporate attorney or regulatory counsel.
- Attend all events sponsored by NARPM National.
- Work closely with RVP's in the establishment of new Chapters.
- Work closely with facilitator(s) in planning the Chapter Leader training that is hosted and funded by NARPM.
- Per policy, sign contracts for facilities as approved by the Board of Directors
- Sign contract as needed to manage the day-to-day operations of the organization
- Approve accounts payable through the AP automation system.

#### Governmental Affairs

- Staff the NARPM Governmental Affairs Committee and all GA subcommittees
- Staff the NARPM PAC Trustees
- Manage the NARPM PAC
- Manage the NARPM Advocacy Fund
- Draft PAC and NAF fundraising letters.
- Manage the NARPM PAC Sweepstakes.
- Manage PAC Distribution Process as directed by the PAC Distribution Team, PAC Trustees, and Board.
- Process NAF funding requests for consideration by the Governmental Affairs Committee and Board of Directors.
- Build and maintain NARPM's infrastructure for tracking federal, state, and local issues and developments.
- Monitor and research federal, state, and local legislation, regulatory action, and policy issues affecting property management.
- Serve as NARPM's registered federal lobbyist(s).
- Maintain contact with Congressional offices and executive branch agencies to grow NARPM's relationships and advance NARPM's policy objectives.
- Develop and disseminate calls-to-action on federal legislative and regulatory issues.
- Develop and disseminate calls-to-action on state and local legislative and regulatory issues at the request of the appropriate chapter(s).
- Build and maintain NARPM's grassroots advocacy lists.
- Work with chapters on state and local issues as practical.
- Draft legislative and regulatory comment letters for consideration by NARPM Leadership.
- Develop and draft policy statements for review by the NARPM GA Committee and Board of Directors.
- Provide legislative updates for members and leadership groups.
- Participate in Chapter meetings as needed and feasible to provide updates on legislative and regulatory issues.
- Assist events staff with the NARPM Capitol Summit
  - Arrange advocacy speakers and topics
  - Help NARPM members make appointments for Hill visits
  - Develop talking points for Hill visits
  - Accompany members on Hill visits
- Maintain relationships with like-minded trade associations and other stakeholders on policy and political issues of interest to NARPM, e.g., National Apartment Association, National Multifamily Housing Council, National Rental Homes Council, Manufactured Housing Institute, Building Owners and Managers Association.
- Provide relevant website material.
- Work with NARPM GA leaders to help them plan for the long-term advocacy success of NARPM.

### Membership

- Generate membership reports for chapters through feeds from OMG management software to the NARPM website.
- Train Chapter leadership on accessing and using these reports to run their Chapters.
- Send new member mailing with welcome letter, certificate, and NARPM sticker.
- Continue email 'drip campaign' to reach out to new members on a regular basis for the first 6 months of membership.
- Run monthly reports for the Member Recruitment Program.
- Send email for referral of new members.
- Maintain and update the membership database.
- Track new conditional members who take the NARPM Code of Ethics class.

### Regulatory Counsel Provided by OMG

- Work with NARPM on an as-needed basis.
- Assist in the PAC to assure it is running efficiently.
- Attend the Capitol Summit event with NARPM leadership.

### Technology Support Provided by OMG

- Keep distribution group email addresses updated for the staff and leaders who use narpm.org email addresses.
- Troubleshoot issues regarding:
  - Members
  - Notifications
  - Emails
  - Registrations
  - Conventions
- Monitor member discussion boards for antitrust violations, issues of general importance, etc.
- Complete technology projects for NARPM
  - Create online forms for Designations, Chapter Compliance, and Chapter Excellence.
  - Create a Prospective Member registration page.
  - Create a New Members Application page.
  - Work with cloud webmaster to ensure that database uploads to the website are running correctly.
  - Research and correct any data errors.
  - Add additional upload feeds from membership database to the website as needed.

### Education Services through Distance Learning

- Continue generating significant income streams for NARPM through a distance learning presence.
- Monitor and update the recently transfigured NARPM classroom designation courses into equivalent online designation courses.
- Manage the students and database for distance learning courses.
- Report monthly on student registration and accounts receivable.
- Create and implement marketing opportunities for the NARPM affiliates through distance learning education.
- Provide incoming instructor review and recommendations for approval.
- Provide professional train-the-trainers for the instructors.
- Provide course development and augmentation in cooperation with NARPM content experts for both classroom and distance learning.
- Advise NARPM on educational policies and procedures.

## **Appendix 4 Accounts Payable policy for NARPM**

WHEREAS, National Association of Residential Property Managers has numerous expenses each month,

WHEREAS, National Association of Residential Property Managers desires to operate with the greatest efficiency and least burden on volunteers,

WHEREAS, policy of the National Association of Residential Property Managers requires two approvals through the accounts payable automation system on any expense.

WHEREAS, the Corporate Secretary/Chief Executive Officer approves all expenses internally prior to them being released to one of the additional approved officers for final approval. Once the officer approval is received, payments will be released. When feasible, NARPM authorizes the use of autopayments as needed to expedite payment of expenditures incurred by NARPM. These autopayments must follow the same approval process as outlined above.

Additional approved officers for NARPM accounts are: Treasurer; President; and President-Elect.

Amended by the Finance Committee and approved by the Board of Directors April 2021

## **Appendix 5 Corporate Secretary**

State law requires every corporation have a Secretary. National Association of Residential Property Managers eliminated the elected secretary position and the role of Secretary has been delegated to the Chief Executive Officer.

Legal Counsel recommends that the Board of Directors take official action annually to appoint the Chief Executive Officer as Corporate Secretary.

Therefore, be it resolved that the Board of Directors of the National Association of Residential Property Managers hereby appoints Gail S. Phillips, as Corporate Secretary, so as to comply with all laws in the state of Virginia.

ADOPTED by the Board of Directors

**Appendix 6 New Bank Signature Cards & Resolutions**

WHEREAS, National Association of Residential Property Managers maintains numerous bank accounts,

WHEREAS, the elected officers of the Association change annually,

WHEREAS, the signatures of officers are needed on checks and other documents,

NOW THEREFORE BE IT RESOLVED THAT the National Association of Residential Property Managers hereby authorizes its' President, Treasurer, President-Elect and Chief Executive Officer execute new bank signature cards and resolutions as required by the various banks.

ADOPTED by the Board of Directors



## Appendix 7 RFP for Management Services

The NARPM Board of Directors oversees functions of the management company. Should the directors desire to investigate services of the management company they shall utilize a Consultant. Funding to pay for the consultant must be approved by the Board of Directors and will come out of the NARPM operating account without the need of the funds being placed in the budget.

### POLICY:

A management analysis will be conducted by an independent professional consultant at a minimum of every ten (10) years (if not requested prior to that date. (Note: First analysis was performed in 2016) or when deemed necessary by the Executive Committee and ratified by the NARPM Board of Directors. The Committee will send out RFPs and hire a consultant to review the associations need for management and evaluate the current management company compared to other management companies and to evaluate if the association is ready for other management options. This policy cannot be amended without a 75% approval of the NARPM Board of Directors.

### PROCEDURE:

#### I Committee:

The committee who will find and work with the consultant shall consist of a Chairperson and two additional members, who are not serving on the board of directors. These members shall be selected by the incoming NARPM President and approved by the NARPM Board of Directors. Other members of the committee shall consist of the NARPM Officer's for the upcoming year.

#### II Request for Proposals (RFP):

The committee will prepare specifications for services required by a consultant to evaluate the management of NARPM. They will solicit no less than three consultant companies by sending out a Request for Proposal. All RFP's will be used to evaluate and develop a comparison for the level of services and fees between all respondents. The anticipated purpose of this action is not to find a new management company, unless determined otherwise in a separate motion. The intended purpose of the RFP is to hire a consultant to evaluate and develop a comparison of the level of services and fees paid by the Association and the future management options for NARPM.

#### III Components of the Request for Proposal

- a. In setting up the RFP the committee shall use job requirements per the policy and procedures manual and description as well as the end-of-year staff hours report.
- b. A copy of the NARPM Policy and Procedures Manual shall be sent to all companies who are requested to send the RFP.
- c. RFPs are to be sent to companies specializing in Association Management consulting.
- d. Should financial reports be required as part of the RFP, NARPM will provide the prior year's reports.

#### IV Evaluation

- a. Pricing/Services – A cost/benefit analysis is to be created.
- b. Experience: The committee is to evaluate each respondent's experience in association management and consulting.
- c. Knowledge: The committee is to evaluate each respondent's knowledge of our industry.
- d. Any recommendations requiring additional action shall be approved by the NARPM Board of Directors.

#### V Recommendation

The Committee's final recommendation shall be presented to the Board of Directors no later than 6 months after the committee was formed unless instructed by the NARPM Board of Directors to have the recommendation faster.

#### VI Final Action

Upon submission of the consultant's final report, the NARPM Board will review the consultant's findings and determine the appropriate next steps. Possible next steps could include, but are not limited to, the following:

a. If there is a recommendation of continued management with the then current management company, the NARPM Board of Directors will evaluate the consultant's recommendation of management services and pricing that should be added, removed or amended, if any. The NARPM President will appoint an ad hoc committee to work with the current management company to negotiate new contract terms and conditions for continued service. A contract with the new terms and conditions is to be drafted and approved by the NARPM Board of Directors. After the NARPM Board of Directors approval, contract execution between the parties to follow within 60 days or less.

b. If there is a recommendation to consider different management options, then the NARPM President will appoint an ad hoc committee that will consist of the incoming President, two current board members, and three members at large which have been professional members in good standing for a period of no less than 5 year to review the consultant's recommendations. The ad hoc committee will create and recommend an action plan and/or RFP for NARPM Board of Directors consideration.

## Appendix 8 Management & Leadership Review Checklist

To be completed three times a year

Reviews with Chief Executive Officer on management operations will take place twice a year with the Executive Committee, Reviews will take place at the Broker Owner Conference, August Board Meeting, and at the National Convention. The Convention Review will reference the results of the Chapter Leader Surveys. If the results dictate issues an outside firm should be brought in for impartial review.

The Executive Committee shall meet with the RVP's to discuss the management team and address any potential issues that need to be addressed. They should also discuss positive accolades on the management team.

Once the review with RVP's is completed, the Executive Committee will meet with the Chief Executive Officer and discuss issues and accolades brought up by RVP's. At this meeting, the Chief Executive Officer will present the metrics for NARPM performance as outlined at the end of appendix 8.

As needed based on meeting with Executive Committee, the Chief Executive Officer will report back to the NARPM President on action that has taken place to correct issues that came out of meeting.

Final review meeting will be held prior to December 31

To Be Completed in June

After the June Board meeting, the incoming Treasurer and Chief Executive Officer will work to accomplish the tasks as outlined in this checklist

To Be Completed in July

If necessary, the Treasurer will make minor revisions and/or add/subtract questions as deemed appropriate to the survey that is distributed to the Chapter Leaders. Note: There should be no adjustments, or as few adjustments as possible, in an effort to accurately quantify performance year after year. If adjustments are needed approval must be obtained from the Executive Committee.

Treasurer must ensure that all questions are set up properly and there are no typos on the survey in Survey Monkey.

Draft a Survey Monkey email blast with the applicable link that Management staff will send to the NARPM chapter Presidents, President-Elects, and Vice Presidents, with a message explaining the purpose of the survey. Management Staff will send email out under the current NARPM President's name.

Periodically, Treasurer and Chief Executive Officer, will review the number of surveys completed and send reminders out to those who have not completed the survey. Depending on the level of participation, RVP's may need to assist in contacting those who have not responded to assist them in getting it and completing it. A return rate of participation of 40% is necessary for an accurate review. If needed, to increase response rate a reminder email shall be sent out after 15 days.

To Be Completed in August

Chief Executive Officer will compile the information collected from the survey and forward to the Treasurer, along with the full survey report. This report will provide an overview of the NARPM Consolidated Survey Results and any notes of issues that are observed in the survey.

Data collected from the survey will be provided to the Executive Committee with an overview of the NARPM Consolidated Survey Results.

To Be Completed in September

The Officers involved in the review and Management Company will compile a written list of items that need to be accomplished based on survey results.

Executive Committee will meet with the Chief Executive Officer and compile an action plan based on the list of items that need to be accomplished based on survey results.

To Be Completed in October

The Executive Committee will supply the Board of Directors with the results from the leadership questions from the Survey Monkey at the October Board meeting.

To Be Completed in December

Executive Committee and Chief Executive Officer will hold a conference call to review the plan of action for the following year and agree on action.

These measurable goals are in place for the staff to aim for in managing the organization.

1. Increase member overall engagement in NARPM.
1. Quarterly advertisements in Residential Resource for the designation and certification programs, and weekly advertisements in the Friday Highlights
2. Semi-annual tracking and reporting of the following:
  - Number of new members attending convention
  - Membership renewals/retention – with a target of 85%
  - Number of members attending convention and broker owner
  - Number of people who complete education class
  - Open rate of emails from national
  - Residential Resource open rate
  - Participation in Annual Survey
2. High quality and profitable meetings
  - Maintain a convention attendance of 15% of the professional membership at the annual convention
  - Convention survey scores to be 4 or higher
  - Profitability will be defined as 10%, based on the stand alone event
3. Ensure the overall financial health of organization
  - maintain reserve requirement of one year of support services expenses as defined in the annual review/audit by the outside CPA
  - Maintain 5 or more primary revenue sources outside of dues
4. Maintain a successful Governmental Relations program
  - Must hold at least 2 fundraisers each year for PAC donations
  - Send at least 2 independent invitations for DOTH
  - Increase the PAC fund by 10% per year
5. Increase the number of effective educations offerings
  - Each course that is held must have survey results of 4 or higher
  - Send an annual survey to inquire about the most important topics we should focus on for developing new classes
    - Provide one train the trainer event each year for national instructors
    - Audit each course for content every 2 years
    - Create at least one new course every 2 years
    - Work with the Professional Development Chair to ensure that Instructors are evaluated at least once every two years
  - Survey the instructors annually for OMGs performance on course scheduling, materials provided, accurate course instructions, etc.
6. Ensure high level management of Organization
  - Reviews with Chief Executive Officer on management operations – 2 reviews to be with Executive Committee,. If the results dictate issues an outside firm should be brought in for impartial review.
  - Number of legitimate complaints shared with Executive Committee members, reviewed quarterly
  - Turnover ratio of OMG staff reported semi-annually to President and President-Elect

**Appendix 9 Software Vendor – NARPM Approved Course Application**

Software Vendor	
Course Name	
Length of Course	
Brief description of courses benefit to a property manager	
Application fee enclosed: \$100 <b>Fee is waived for any NARPM official partners</b>	
I have read and agree with the course application terms and condition and do hereby submit this course for approval as a NARPM elective educational course for the designation program.	
Signature of Vendor Representative	
Date Submitted	
Approval by Professional Development Chair	<input type="checkbox"/> Yes <input type="checkbox"/> No
Date Approved	

Submit completed application to:  
 NARPM  
 1403 Greenbrier Parkway, Suite 150  
 Chesapeake, VA 23320  
 Phone: (800) 782-3452  
 Email: info@narpm.org

VENDOR COURSE APPLICATION  
Terms & Conditions

By submitting this on-line course application, the Vendor agrees that such submission is free from copyright, or other licensing or intellectual property restrictions on use or dissemination. NARPM Vendors and Affiliates who submit proposed courses do so at the risk of losing their rights to any information provided and NARPM offers no guarantees as to the use of the submitted course, or the integration of information into other established or proposed future NARPM courses.

1. Vendors and Affiliates that offer NARPM endorsed courses MUST pre-qualify such courses, and changes, with NARPM for course approval BEFORE such courses can qualify as education elective credit courses for association designation program.
2. No courses may be offered formally or informally to ANY NARPM members for designation elective credits, unless the course is first approved by NARPM, and remains in good standing by NARPM.
3. NARPM does not endorse the products of services provided by the individual vendor or instructor, and such course materials must clearly state this limitation on the course materials: "This course was prepared by VENDOR XYZ in support of the professional designation efforts for NARPM. NARPM does not endorse the products or services of any particular vendor or affiliate. VENDOR XYZ agrees to abide by the NARPM code of ethics, and shall hold the professional training to NARPM members in the highest professional regard."
4. Vendor or Affiliate agrees to be bound by these terms and conditions while course is being offered as a designation elective credit, unless otherwise modified as mutually agreeable by Vendor and NARPM.
5. Vendor or Affiliate MAY NOT display, distribute, publish, enter into a database, perform, modify, create derivative works, transmit, post, or otherwise provide any training materials under the designation elective credit program except with approval of NARPM.
6. Vendor or Affiliate agrees that the intellectual property may not be used for unlawful purposes, nor shall it be used in such a way that promotes the vendors products or services over another vendor.
7. Vendor or affiliate agrees to hold NARPM harmless from and damages, risks, or adverse occurrences as related to the use and incorporation of this material into the NARPM professional credential curriculum. The Vendor further agrees to save, indemnify and hold NARPM its officers, directors, employees, agents, licensors, business associates, members, affiliate vendors, and suppliers harmless from and against any actual or threatened claims, actions or demands, liabilities and settlements including, without limitation, reasonable legal and accounting fees, resulting from, or alleged to result from, your submission of the intellectual property in a manner that violates or is alleged to violate the non-infringement rights of Third Parties, Data Accuracy, or damages from use or dissemination of this intellectual property.
8. UNDER NO CIRCUMSTANCES WILL NARPM BE LIABLE FOR ANY DAMAGES OR INJURY, INCLUDING ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, PUNITIVE OR OTHER DAMAGES RESULTING FROM ANY CIRCUMSTANCE INVOLVING THE INTELLECTUAL PROPERTY (INCLUDING BUT NOT LIMITED TO DAMAGES OR INJURY CAUSED BY ERROR, OMISSION, INTERRUPTION, DEFECT, UNAUTHORIZED USE OF THIS INFORMATION, LOST DATA, DELAY IN OPERATION OR TRANSMISSION, BREACH OF SECURITY, DEFAMATORY, OFFENSIVE OR ILLEGAL CONDUCT OF THE INSTRUCTOR.
9. NARPM reserves the right to seek all remedies available at law and in equity for violations of this Terms and Conditions statement. No delay or failure by NARPM to enforce any of these Terms and Conditions shall constitute a waiver of any of our rights under these Terms and Conditions.

Severability

If any clause or provision set forth in this Terms and Conditions statement is determined to be illegal, invalid or unenforceable under present or future law, the clause or provision shall be deemed to be deleted without affecting the enforceability of all remaining clauses or provisions.

#### Governing Law and Jurisdiction

These Terms and Conditions and any disputes arising under or related to these Terms and Conditions will be governed by U.S. federal law and the laws of the State of Virginia, without reference to its conflict of law principles. Any such dispute shall be resolved exclusively in the state or federal courts in Chesapeake, Virginia, where NARPM has its headquarters. You agree to submit to the personal jurisdiction and venue of the courts of the State of Virginia for any legal proceeding involving the Site, regardless of who initiated the proceeding.

This English-language Terms and Conditions statement is NARPM official agreement with users of this information. In case of any inconsistency between this English-language Terms and Conditions statement and its translation into another language, this English-language document shall control.

#### For More Information

If you have any questions regarding our Terms and Conditions statement, please contact NARPM before submitting any course materials.

## **Appendix 10 Past President Charity Event**

2010-Seattle The GC at Newcastle donated to Creative Living Options \$36,525  
2011-Dallas Brookhaven CC donated to Vogle Alcove \$40,000  
2012-Washington DC Old Hickory GC donated to ALC Association & Corporate Angel Network \$50,513.50  
2013-San Diego Twin Oaks GC American Cancer Society and The Nice Guys \$64,887.84  
2014-Curling Minnesota Special Olympics \$72,000.00  
2015 – Atlanta, GA - American Brain Tumor Association \$161,740.34  
2016 – Maui, HI – American Stroke Association \$60,000.00  
2017 – Orlando, FL – PTSD Foundation \$68,345.00  
2018 – San Diego – Casting for Recovery \$55,223.00  
2019 – Phoenix, AZ - Jessie’s Well c/o National Christian Foundation \$125,022.49  
2020 - Alexander Hamilton Scholars \$30,271.50  
2021 – Meals on Wheels \$10,597.50  
2022 – Make a Wish (direct donations to the charity) \$48,000  
2023 – Communities in Schools \$34,300.00

Total donations 2010-2023 \$857,426.17

As past presidents of NARPM we have all given back to the industry and we have all received back in the way of ideas for our businesses to help us be successful. We have also gained many new friends enriching our lives and making property management more fun. The purpose of our annual charity event is to raise money for a worthy cause as championed by the past president chairs of that year. In doing this we hope to help the charity do its work and show our members by example that donating and serving is an integral part of being a member of NARPM.

Each year the past national presidents of the National Association of Residential Property Managers form a committee in order to raise money for charity. A past president or two past presidents serve as the chair or co-chairs and “run” the event each year. The past president chair(s) form a committee to help with the various tasks. The event day is scheduled by the convention committee, usually the day before the annual convention begins. This paper is to be used to assist the chair and the committee in carrying out their duties in order to maximize the amount donated and to run the event most efficiently.

Golf tournaments have proven to be a great way to raise money for charities. The membership is sold on the idea of the past presidents running a charity event and the members have enjoyed getting together for a day prior to the convention to network and have fun with each other. Once organized the job is to raise money through sponsorships throughout the preceding year. Most of the money that is donated is raised through the sponsorships as the golf and luncheon usually just cover their costs.

All donations to charities will be distributed after all final accounting for the convention has occurred. This could mean a delay of two months for charity to receive their donation.

The following is a list of the things that have to be done. Below the list are detailed ideas on how to carry out the listed items.

1. Select the charity and form your committee. (one year out)
2. Obtain the date and timing of the event. (one year out)
3. Select the event (usually a golf tournament). (one year out)
4. Determine the venue including location and contract with the site affiliate. (11 months out)
5. Create the donation levels and sponsorships. (11 months out)
6. Work with National Staff to create the tournament flyer for signing up sponsors and golfers. (10 months out)
7. Schedule to have presentations and flyer distribution at all mid-year and regional events. (10 months out)
8. Hold monthly meetings with the committee. (10 months out)
9. Determine the event competition and the prizes.
10. Run the event with the help of your committee and the volunteers you have.

Select the charity and form your committee (one year out)



The first order of business is to select a charity that is meaningful to the chair. The closer the charity is to you personally the better. This should be done as soon as possible once you know you are the chair and must be approved by NARPM National. Meet with the charity if possible to garner their support and to obtain some information on the work they need to do and how this contribution will make a difference. It is now time to form your core committee. This committee is best to be formed using past presidents but may also be manned by any general member of the association.

The committee could consist of the following members:

- A. Chair of the committee (you and possibly a co-chair with another past president)
- B. Players-This person is to work at getting people signed up to play in the tournament.
- C. Affiliates-This person is to work at getting affiliates to sponsor holes, balls, tees, etc. You will also need food sponsors for breakfast and lunch or lunch and dinner and an overall major sponsor for the tournament. The job includes coordinating the hole sponsors, signage at the event and lunch.
- D. Raffles and prizes chair. This person runs the raffles and obtains prizes for the winners of the various competitions.

1. Obtain the date of the event. (one year out)

The NARPM Meeting Planner or NARPM CEO will know the date available for the event at least a year in advance. You must know this date to proceed with you plans. It is good to know that the event will need to start in the morning and conclude with participants arriving back in the hotel by about 4 pm. There is normally another event that follows this charity event.

2. Select the event (one year out)

In some climates it may not be advisable to play golf on the date of the scheduled event. In that case, the chair may select another suitable event such curling or bowling.

3. Determine the venue including location and contract with the site affiliate. (11 months out)

Whatever the event you will need to contract with the location for the date selected. For golf, you need to think about these items:

- A. Look for locations that are within a reasonable amount of distance from the hotel where the convention is located. You will need to plan on providing transportation to the event, especially if it is located more than a few miles away. National Staff must sign all contracts approved by the chair, including the bus transportation contract.

You should plan on not charging the players more than \$150 per player. This fee is to cover the event and the meal afterward.

4. Create the donation levels and sponsorships. (11 months out)

The donation levels can be garnered from the previous tournaments. The more sponsorships and donors you have the more you will be able to donate to your charity.

The following ideas may help you to determine how you will organize your sponsors”

Overall Event Sponsor (\$5,000) Name recognition on all printed and electronic marketing, foursome paid for.

Lunch Sponsor (pay for catered lunch at event awards lunch) Name recognition at the event and on all electronic marketing. Early in the planning this amount must be determined for marketing of the sponsorship.

Wood Sponsor (\$1,000) Suggested level for all past presidents. Name recognition on all electronic marketing and the event day.

Iron Sponsor (\$500) Name recognition on all electronic marketing and the event day.

Friend of the Past Presidents (\$100)

Chapter Sponsors (\$250) – In past have not seen a difference between this sponsorship and the hole sponsor, other than Dollar Amount. Can we combine them to \$200 Chapter/Hole sponsor?

General Sponsors (\$150) Give priority to hole sponsors that will attend the event and provide entertainment at their tee box. You can usually double-up having a affiliate sponsor and a chapter sponsor at each hole.

5. Create the event flyer for signing up sponsors and players. (10 months out)

6. This task starts with obtaining the previous years' flyers from headquarters. Once you have that meet with your committee to create your flyer. There will be one flier for sponsors and players. National

Staff will do the actual work to print it and get it into an electronic format. Schedule presentations and flyer distribution at all state events, and the Broker/Owner meetings. (10 months out)

This task should be scheduled by the chair but the actual presentation at each meeting can be delegated to the local leaders or local past presidents. It is best to use a scripted talk. These presentations cannot be overemphasized as they are the key to raising enough money to make the event a success. Personal testimonials can make all the difference in adding credibility and in obtaining more donations. In the past we have had YouTube videos created by the chair that were used at the midyear meetings to great effect.

7. Hold monthly meetings with the committee. (10 months out)

- A. Arrange for signage
- B. Arrange for onsite signage for the day of the event to recognize the donors.
- C. Monitor progress on signups, publicity, meetings and make arrangements to call on past participants to encourage them to sign up or to be a donor.
- D. Monitor sign ups as to the number of players, donors and the amounts.
- E. Keep the venue up to date on your progress and make sure you meet any target dates.

The committee should reserve some funds from the collections to purchase prizes for the following competitions:

- A. First place team (four prizes)
- B. Second place team (four prizes)
- C. Third place team (four prizes)

The prizes are suggested to be gift cards of national chains or cash cards. Here is the suggested levels:

- A. First place and long drive and closest to pin: \$50 gift cards to each player.
- B. Second place team: \$25 gift cards to each player.
- C. Third place team: \$10 gift cards to each player.

Plan ahead as NARPM National cannot carry cash to the event. If cash is needed National will draft a check for a volunteer to cash and then receipts submitted to National Staff showing distribution of funds.

8. Run the event with the help of your committee and the volunteers you have.

Work closely with National Staff and run your issues by them before making changes.

Leaders and volunteers should arrive one hour prior to the arrival of players, normally 1 hour before the start of the competition.

NARPM National staff will do your sponsor handout for the event. Give them time to create the flier and be prompt in proofing all information.

## Appendix 11 State Conference White Paper

### NARPM State Conferences White Paper

Includes Event Time Line

State Conferences will be held if the leadership in the state determine it is feasible. The state leaders shall appoint a chair and vice chair to handle the State events. It is understood that the Vice Chair will move up to the chair position the following year. There should be members from the planning team in the City of the State conference that can assist with any hotel issues that arise.

NARPM encourages state to brand the marketing of the event. At the end of each conference, members should be surveyed to determine future event location. From this feedback, Volunteers will choose location of the state. When looking at venues, a requirement is that the vendor show should be on the same floor as the breakouts and/or general sessions. This will give members ease of access to the vendors and put the vendors in the middle of all the functions of the event. Vendor area is to be large enough to accommodate the first night reception shall be held in the vendor hall. This will also encourage members to visit vendors and see what products are being offered. Along with the reception, the breakfast should be served in the vendor hall, along with an afternoon break. NARPM National will sign all contracts and set up direct bill account.

Management Staff will also handle registration at a cost of \$6 per person that will be covered by the registration fees. The \$6 per person is to cover the OMG time for management staff to handle all registrations, create reports to supply to planning committee as needed, produce name badges, handle vendor registration, and pay bills from the event. This amount is paid to NARPM National out of proceeds for the event. All hotel room commissions will be payable to OMG to cover all other costs. If event does not meet room minimum nights and penalties are to be paid, these charges will come out of registration fees. Credit card merchant charges for states will be covered by NARPM. NARPM also retains funds on the balance sheet from past State events to cover all future deposits and possible losses that the events could incur. The balance in these funds shall always be kept at \$5,000. Should fund go below this amount, it will be brought back up to balance with the next state event.

There shall only be one state conference per spring months (Feb-May). A one day state can follow the broker owner retreat and NARPM will negotiate that event in the hotel contract with the broker owner retreat. Months will be awarded on first come first served.

Once all outstanding obligations have been paid the remaining proceeds will be distributed based on a decision made by the RVP and the state workgroup. If the balance fund needs to be seeded, it will be done before any chapters are paid. The Chief Executive Officer who will determine amount paid to each region chapter, with confirmation from the RVP's on which chapters participated in the planning. Once the funds are confirmed checks will be distributed. Money will be held to cover the convention registration for the following year State Chairs and Vice Chairs.

If a state should elect to hold their own conference they can use the above process. There will be an additional charge of 3.5% per credit card registration to cover credit card merchant charges. National staff will not participate in state planning meetings.

#### Details for event planning:

Planning subcommittees are to be appointed to handle assigned tasks. All planning subcommittees should meet between regular state conference planning meetings and use the 800 conference call for all meetings. Schedules should be established so meetings do not overlap.

Be careful not to have the chapter where the event is located dominate the planning of the event. Remember this is a state event and all chapter leaders should have input on the structure of the event. The state planning committee should be composed at minimum of one member from each chapter in the region.

When looking at venues, a requirement is that the vendor show should be on the same floor as the breakouts and/or general sessions. This will give members ease of access to the vendors and put the vendors in the middle of all the functions of the event. Vendor area is to be large enough to accommodate

the first night reception shall be held in the vendor hall. This will also encourage members to visit vendors and see what products are being offered. Along with the reception, the breakfast should be served in the vendor hall, along with an afternoon break.

Optional offsite events can be planned by the State Committee. All contracts for these events must be sent to National NARPM for review prior to signing. Check all dates and deposits to make sure they are correct before forwarding the National staff as they do not know your schedule.

All state events shall supply their own AV (LCD projectors and lap tops if needed). National NARPM will have one LCD projector available that will be used for the Leadership Session.

The planning committees shall have one conference call per month until the event is one and a half months out when calls should be held at least bi-weekly. Under each state committee shall be an educational subcommittee made up of several volunteers who help with the planning of the breakout sessions. There should be one individual who works with the NARPM education manager to set up the Educational Classes on the days prior to the opening of the State Event. There shall be a trade show subcommittee that works with the volunteers and National Staff, and a communications subcommittee who will work with National Staff on marketing.

Vendors are limited to table top displays as there is no room for large back-drops. Only consideration that should be given is to the Platinum Sponsor and NARPM Corporate Partners. Information should be gathered before the event so if extra space is needed it can be accommodated before arrival at the event.

All break-out sessions must be submitted to NARPM National Graphic Staff no later than ninety (90) days prior to the event. Staff will draft a registration brochure that includes education registration. An outline of the program with the name of sessions and a registration form will be printed in the brochure. The final onsite program will be laid out by staff and include a very brief description of the break-out and speakers names.

The Registration Table shall be set up no later than an hour prior to the opening. Registration area should open at 11 AM on the first day for leadership session and close at 5 PM. The second day the registration area should open no later than 7:30 AM and close at lunch time.

Vendors should be able to check in at the 11 AM registration time. A vendor booth shall be given one program per booth and a list of all attendees. No preregistration list is given to vendors prior to the show.

NARPM Chief Executive Officer is there to assist with any onsite planning issues. Volunteers should be scheduled to cover registration table.

## EVENT CHECKLIST FOR NARPM State Conferences

### 12 months + before event

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- Decide in conjunction with NARPM Meeting Planner on potential sites
- Staff to determine space needs: type of sessions (general vs. breakouts), exhibits, meals, etc.
- National will send out RFP's to hotels
- Staff to recommend site and secure hotel contracts in conjunction with National Meeting planner that are signed by National Chief Executive Officer
- Develop the budget: including food & beverage, audio/visual, meeting room rental, speaker fees, advertising. Review previous year's budget and final expenses.
- National will establish a master account with hotel and determine if payment of deposits is necessary

### 9 months + before event

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- Put together a team or committee (CHAIRS: i.e. Speaker coordinator, Site Coordinator, Public Relations/Marketing, Vendor/Sponsors, Brochure/e-mail) to develop the program, organize and implement the meeting (i.e.: choose session topics and speakers, serve as "MC"). Include National Staff on all notifications of meetings.
- Set up subcommittees to handle Programs; Sponsorships; Trade Show; and Email blasts
- Choose a theme. Recommend you use the Presidents theme for the year
- Begin monthly committee meetings
- Review sponsorship amounts/levels that have been defined by national
- Develop marketing/public relations plan: blast emails, and timeline to execute the plan

### 6 to 3 Months before

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- Confirm meeting room/speakers schedule
- Start promoting Designation Courses locally so members can take advantage of early bird discounts
- Finalize the speaking program and confirm speakers
- Identify any Audio/Visual needs of speakers
- Continue monthly committee meetings
- Request logos from any sponsors for printing
- Finalize with National staff the content of any brochures, blast email, programs, etc. Brochure is handled by National
- Start email blasts for convention brochure at least 100 days out

### 2 Months before

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- Finalize exhibitor lists if appropriate
- RVP/Event chair to draft e-blasts and send to National to be sent out bi-weekly
- Work with management staff to select menu and room set up
- Finalize operational schedule of events at the convention
- Finalize Audio/Visual requirements
- Hold a Pre-convention meeting with the committee and hotel if possible. If not meet with hotel the evening before the event.
- Finalize transportation and hotel accommodations for speakers if needed
- Write and send out Press Release about upcoming event in appropriate newspapers throughout the region
- Order NARPM booth from National if needed.
- Follow up to confirm sponsorships
- Review needs for signs at the convention: registration table, directional, sponsor thank you, etc. and order them (make sure they meet requirements of National as well as the hotel)
- Determine who will serve as "MC" of event, introducing speakers, etc. Consider a past president if possible.
- Create a "script" that includes a timeline for anyone involved in the production to include all volunteers.
- Review/finalize budget
- Ensure that all committee members and speakers have made hotel reservations before the reservation cut-off date and inform them of transportation options at your particular airport.

### 1 Month before

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- RVP/Event chair to draft e-blasts and send to National to be sent weekly.
- Work with National Staff to complete on site brochure. Include brief details on the break-outs and room location for break outs) SEE ATTACHED SAMPLE
- Confirm speaker participation and get up-to-date bios to use for introductions
- Complete list of contents for and begin to assemble welcome packets
- Review script/timeline
- Confirm setup times with hotel
- Confirm number attending
- E-mail all chapters to bring gift cards for raffle and if there is a minimum \$
- Finalize the duties of committee members: who will work the registration desk (need two people for almost the entire day), introduce speakers, etc. Be sure there are enough volunteers to handle issues that may arise like problems in the meeting rooms
- Let National know if checks for payments are needed to be made for the day of the event
- Make sure you have a schematic of the Vendor area and identify where each vendor booth will be.
- Contact vendors to make sure at least one will have bags for attendees
- Decide where 50/50 raffle proceeds will be donated

### 2 Weeks before

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- Meet with committee via conference call for last-minute details
- Hold walk-through of event with responsible committees, chairpersons and responsible site staff members at hotel the evening before event
- Deliver final scripts/ timelines to all program participants, including National Chief Executive Officer
- Finalize Food & Beverage guarantees
- Confirm number of volunteers and where they can be used: i.e. Monitor for each break-out session, runner for vendors, runner for speakers/break-outs, registration, designation classroom monitor to collect tests, pack boxes to send back to national, 50/50, collection of raffle gifts, photography, A/V, video, etc.
- Update Script/timeline
- Make follow-up calls to news media for advance and event coverage if desired
- Confirm with National checks for payments are needed to be made for the day of the event. Is any cash needed for tips, etc.?
- Make bio cards to give to give to classroom monitors for introductions of the speakers.

### Day before event

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- Recheck all equipment and supplies to be brought to the event
- Arrive early to the hotel unpack equipment, supplies and make sure nothing is missing
- Reconfirm Food & Beverage and room sets with hotel
- Check with volunteers to make sure all tasks are covered
- Setup registration area
- Check A/V equipment and staging
- Do a physical walk-through of the hotel and conference area and a mental walk through of all details
- Give all volunteers/vendors/speakers/emcee copy of final script

### Post-event

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- Inventory, pack, and ship materials back to National Office
- Send all monies to national (late registrations not collected on conference day and any additional vendor lunch payments)
- Send all left over materials back to National including ribbons and name badges
- Send back NARPM booth
- Final call to all chairs for receipt to submit to National
- Financial reconciliation with National staff
- Thank you notes/follow-up materials/efforts

**Appendix 12 NARPM PAC Policies**

PAC Distribution Process

The NARPM PAC Trustees shall submit recommended PAC funding to the NARPM Board of Directors for its consideration

These recommendations shall be based on the following criteria for individuals:

- Leadership: The candidate’s position in party or caucus leadership in the House of Representatives or the Senate.
- Committee Membership: The candidate’s committee assignments having jurisdiction over issues important to NARPM:

US House	US Senate
Appropriations	Appropriations
Financial Services	Banking Housing & Urban Affairs
Judiciary	Judiciary
Ways and Means	Finance
Energy and Commerce	Commerce

- Voting Record: The candidate’s voting record and/or position on issues that align with the property management industry.
- Influence: The candidate’s ability and willingness to make a difference on key issues and in pursuit of NARPM’s advocacy goals.
- Political: The need for funding to run a viable campaign during the current election cycle and the competitiveness of the campaign.
- Relationship Building: Introducing and educating newly elected officials or candidates about the perspective of the property management industry and establishing a working relationship with those members

In making funding recommendations, the NARPM PAC Trustees will generally avoid recommending funding for candidates in open-seat primaries (or other nomination contests). Exceptions would include (but not be limited to) an open primary where:

- One or more of the candidates was previously supported by NARPM PAC or the NARPM PAC Trustees reasonably believe that the candidate supports the goals of NARPM.
- One or more of the candidates is a NARPM member

This policy does not apply to incumbents who are seeking re-election for whom NARPM PAC wants to recommend support.

The PAC Trustee recommendations may also include recommended funding for party campaign committees connected to the party conferences in House and Senate. Throughout the course of the year, the Trustees may recommend changes to the Board for its consideration.

## Investor Benefits

Investor benefits will be based on the previous year's combined NPAC and NAF investment levels, except that investors who would not otherwise qualify for the Level-Appropriate Logo, Special VIP Quarterly Briefing, the Special VIP Event at the Legislative and Educational Conference, Major Investor ribbons, or the Hospitality Suites may qualify in the current year by investing at the required level prior to the current event.

	Fair Share	100 Club	Investor	Capitol	Major	Presidential
	\$25-\$99	\$100-\$249	\$250-\$499	\$500-\$999	\$1,000+	\$1,000+ and \$1,000+ to NARPM Allies
"I Invested" Button (Available at signature events for Fair Share and above investors. Sent with Lapel Pin for 100 Club and above).	X	X	X	X	X	X
Recognition on NARPM Website	X	X	X	X	X	X
Level-Appropriate Lapel Pin		X	X	X	X	X
Listing in NARPM GA Update		X	X	X	X	X
Level-Appropriate Logo for email sig		X	X	X	X	X
Stage Recognition at Capitol Summit			X	X	X	X
Program or Brochure Recognition at LC			X	X	X	X
Special VIP Quarterly NARPM Insider Briefing				X	X	X
Special VIP Event at Capitol Summit				X	X	X
Major Investor Ribbon at Signature Events					X	X
Special Hospitality at Signature Events					X	X
Stage Recognition at Convention					X	X
Program or Brochure Recognition at Broker-Owner and Convention					X	X

## NARPM Allies Program

At the same time the PAC Trustees make recommendations for funding, they will also make recommendations for approved candidates for the NARPM Allies program. Under this program,



NARPM members will be encouraged to make contributions to legislators who are particularly helpful to NARPM or who are particularly important to NARPM's advocacy goals.

The list should reflect partisan and chamber balance and should contain 15-25 people.

All participants who register for the program and contribute at least \$250 to approved NARPM Allies will be recognized on the NARPM website and with a ribbon at signature events.

#### PAC Thank You Workflow

All one-time NPAC and NAF Investments will get drip emails from the following after their investment:

- NARPM PAC Chair
- NARPM GA and NAF Chair
- NARPM President

It shall be the responsibility of staff to secure approved email drafts for this purpose.

Monthly investors will get the same drip email as one-time investors upon their initial payment. Subsequent monthly payments will be sent an acknowledgement from NARPM Advocacy.

Major Investors will get a handwritten note from either the NARPM PAC Chair or GA Chair, either upon their payment (one-time) or initial monthly payment.

#### **Annual Goals**

Each year, the overall annual NPAC/NAF goal will be the minimum of the fair share investment amount multiplied by the number of members, with individual goals for NPAC and NAF of one-half of that overall amount. For example, if the fair share minimum is \$25, and there are 6,000 members, then the overall goal is \$150,000 (\$75,000 each for NPAC and NAF). Goals for chapters, committees and other groups will be calculated in a similar fashion.

Chapters that meet their goals will be recognized on stage at the Capitol Summit.

#### **NAF Awards**

the NARPM Advocacy Award, to be presented at the Convention. The award would be awarded by the Governmental Affairs Committee to a member or chapter that has distinguished themselves during the previous year in advocacy at the local, state, or federal level.

#### **Sprit of PAC Award**

Spirit of NARPM PAC Award, to be presented at the Convention. The award would be awarded by the NARPM PAC Trustees to a member or chapter that has distinguished themselves during the previous year in support of NARPM PAC and/or the NARPM Advocacy Fund.

## **Appendix 13 Internal Controls & Procedures for PAC Financial Management**

### **PURPOSE**

This document establishes internal controls and procedures for financial management to ensure the effective and efficient operations of National Association of Residential Property Managers Political Action Committee (PAC). This is a working document that should be updated when, to the extent necessary, including but not limited to reflect changes in the Committee's personnel, scope, or activities.

### **SOLICITATION GUIDELINES**

Each written communication that constitutes or includes a solicitation of a contribution to the Committee must include the following disclaimer:

Contributions to NARPM-PAC are not tax-deductible as charitable contributions for federal income tax purposes. Contributions from non-permanent resident foreign nationals are prohibited by federal law. All contributions to NARPM-PAC are voluntary. You may refuse to contribute without reprisal. Contributions to NARPM-PAC are used for federal election purposes, and may be used in connection with state elections, as well. A contribution in the amount of \$5,000 per person is the maximum allowed per year. If this solicitation suggests a contribution in a certain amount, it is only a suggestion, and you may give more, less or not at all, and the amount given or refusal to give will not benefit or disadvantage you.

Paid for by National Association of Residential Property Managers

The disclaimers must be "clearly readable," which means that they should be printed in a font size equal to or greater than the smallest font size used elsewhere in the communication, but no less than ten points, with a reasonable degree of color contrast between the text and the background.

The "paid for by" disclaimer must be enclosed in a printed box, as in the example above, and must appear on each piece of a multi-piece communication.

Once approved, a communication may be used repeatedly without further approval of counsel; provided, however, that any changes to a pre-approved communication should be submitted for review and approval. A disclaimer that has been provided or approved by counsel should never be deleted, modified, altered, edited or otherwise changed in any way.

### **CONTRIBUTION PROCESSING**

The Committee will solicit and receive contributions via check and credit card. As permitted by federal law, the Committee will accept cash contributions in amounts up to \$100. In the case of auctions or similar fundraising activities, the Committee may accept cash contributions not exceeding \$100 per person annually, in accordance with federal regulations.

Contributions may not be combined with other NARPM payments such as dues or registrations.

Credit card contributions may be received by by NARPM staff via an online portal, via a paper form submitted to a member of NARPM staff, or over the phone directly with NARPM Staff.

NARPM Staff are authorized to accept contributions on behalf of the Committee. All checks accepted by any other individual on behalf of the Committee should be forwarded within 24 hours to NARPM Staff for vetting and processing.

#### A. Contributions by Check

The following procedures apply to the receipt and deposit or processing of contributions by check:

Contributions may be mailed to National Association of Residential Property Managers:

1403 Greenbrier Parkway, Suite 150, Chesapeake, VA 23320

Alternatively, contributions may be hand-delivered to NARPM Staff.

Once they receive a contribution check, NARPM Staff will record the payment and then send the check along with any accompanying reply device, contribution form, cover letter or other material to accounting for deposit. NARPM Accounting Staff will store such copies in hard copy format at their office and will upload a scanned copy to a secure network drive (G:Drive/NARPM/PAC/Contribution Backup).

NARPM Staff will review each contribution to ensure that it is permissible, following the process in Attachment A: Vetting Contributions for Permissibility.

For each permissible contribution, NARPM Staff will log, at a minimum, the following “best efforts” information in MAGIC:

Contributor Name  
Contribution Amount  
Contribution Received Date (in “Reference #” field of MAGIC)  
Means of Contribution (e.g., “Check No. \_\_\_\_”)  
Contributor Address  
Contributor Occupation  
Contributor Employer

Collection of Best Efforts Information. The FEC requires the Committee to disclose the name, address, employer, and occupation for any individual whose aggregate contributions exceed \$200 in the two-year federal election cycle. For each contribution made by an individual for which the donor did not provide a complete address and/or employer and occupation information (and the information is not publicly or otherwise readily available), NARPM Staff will make at least one attempt within 30 days to contact the donor to obtain this information either by mail, e-mail or phone, and will log this attempt in the Member Notes section of MAGIC. If the attempt to obtain this information is by mail or e-mail, NARPM Staff will retain a copy of the correspondence. If the attempt to obtain this information is by phone, NARPM Staff will record the date and time of the phone call.

Once NARPM Staff determines that a check may be deposited into the Committee’s account, they will prepare it for deposit as follows: Each check should be endorsed with “For Deposit Only” and list the Committee’s name and account number. All checks are deposited electronically via scanner no deposit slips are required.

After the deposit is made, NARPM Staff should attach the deposit receipt (if available) to the deposit batch, scan and upload the entire deposit batch to a secure network drive G:\NARPM\Accounting\BATCHES\NPAC Batches\2024), and retain the deposit batch hard copy as part of the Committee’s records at their office.

The FEC requires that contributions be deposited within 10 calendar days of receipt. However, NARPM Staff should vet and process all contributions the same day or next day following receipt. For any contribution that is not deposited on the same day it is received, NARPM Staff should secure the contribution overnight.

NARPM Accounting Staff will enter all contribution data into the Committee's FEC-file data set.

NARPM Staff will ensure that all donors receive a receipt or other acknowledgment of their contribution.

#### B. Contributions by Credit Card

The following procedures apply to the receipt and processing of contributions by credit card:

NARPM Staff will print a copy of the contribution receipt and file it together with the completed contribution form in the Committee's records. NARPM Staff also will scan and upload a digital copy of each receipt and contribution form to a secure network drive (G:\NARPM\Accounting\BATCHES\NPAC Batches\2024).

NARPM Staff will review each contribution to ensure that it is permissible, following the process in Attachment A: Vetting Contributions for Permissibility.

For each permissible contribution, NARPM Staff will record, at a minimum, the following "best efforts" information in a spreadsheet:

- Contributor Name
- Contribution Amount
- Means of Contribution (i.e., Credit Card)
- Date of Contribution (Receipt Date in MAGIC)
- Contributor Address
- Contributor Occupation
- Contributor Employer

For each permissible contribution, NARPM Accounting Staff will enter all contribution data into the Committee's FEC-file data set.

NARPM Staff will ensure that all donors receive a receipt or other acknowledgment of their contribution.

#### DISBURSEMENTS

The Committee will make periodic disbursements of its fund as payments for products and services to vendors, contractors, consultants, etc., as follows:

The following individuals may enter into contracts on behalf of the Committee and authorize NARPM to make disbursements: Treasurer of the PAC. See PAC Bylaws.

The Committee shall issue payments via check drawn on the Committee's primary depository account and/or its non-federal account, for expenses related to administering the PAC. ACH payments are authorized for the following transactions: Merchant Processing. See PAC Bylaws.

Subject to the authority and authorization specified in the first bullet, above, of this Section IV, the following individuals are to be signers on the account: See PAC Bylaws

Subject to the authority and authorization specified in the first bullet, above, of this Section IV, the following individuals are to be signers on the account: See NARPM Bylaws.

NARPM Accounting Staff will keep the Committee's checkbook and will be the sole issuer of check disbursements.

If an error is made when preparing a check, the check should be voided by altering the check to prevent its use. The voided check or a copy of the voided check should be retained in the Committee's records for accounting purposes.

Prior to distributing a check, NARPM Accounting Staff should record the following information about the disbursement in a spreadsheet and/or accounting system: date, check number, payee, amount, and purpose (including the corresponding invoice number, if any, and a description of the goods or services received in exchange for the payment).

NARPM Accounting Staff shall enter information about any new disbursements into the Committee's FEC-file data set.

## ACCOUNTING AND REPORTING

No later than five days before required filings, NARPM Accounting Staff will ensure that complete information about all of the Committee's receipts and disbursements is entered into the Committee's FEC-file data set.

No later than the 20<sup>th</sup> day of each month, NARPM Accounting Staff will perform the monthly bank reconciliation and distribute it to NARPM PAC Treasurer.

NARPM Accounting Staff will prepare the Committee's FEC reports as required. Five business days prior to any reporting deadline, NARPM Accounting Staff will distribute a draft of each disclosure report to NARPM Controller.

NARPM Controller must authorize NARPM Accounting Staff to file each disclosure report. Upon filing of any report, NARPM Accounting Staff will forward a copy of the filing receipt to the NARPM Controller. NARPM Accounting Staff will retain a copy for each report and the filing receipt for the Committee's records.

## RECORDKEEPING

The FEC requires that records be retained for a period of three years after the relevant information has been disclosed. NARPM Staff will be responsible for ensuring that the following documents or files are retained in either physical and/or electronic form, as appropriate:

Copies of each contribution check, reply device or other accompanying form or written material, deposit slip, and deposit receipt (if available) (regardless of whether the Committee accepted or rejected the contribution).

Copies of each credit card authorization (if available), other electronic records concerning credit card transactions, and accompanying contribution forms (regardless of whether the Committee accepted or rejected the contribution).

Copies of each disbursement check, any underlying invoices/receipts, and the written authorization for the disbursement.

Copies of each bank statement, including copies of cancelled checks/images.

Copies of each disclosure report, as filed, together with a copy of the filing receipt.

ATTACHMENT A:  
VETTING CONTRIBUTIONS FOR PERMISSIBILITY

Is the contribution made by check? If yes, then:

Is there a name listed on the check?  
If no, reject the contribution.

Is the check made out to "National Association of Residential Property Managers PAC," or some derivation thereof?  
If no, reject the contribution.

Is the check written for a specific amount, and do the written and numeric amounts on the check agree? If no, reject the contribution.

Is the check post- or stale-dated (i.e., beyond current date or older than 90 days)?  
If yes, reject the contribution.

Is the contribution made by credit card or cash? If yes, then:

Is the contribution accompanied by "best efforts" information?  
If no, attempt to contact the contributor (See Internal Controls and Procedures, Section III.B)

If yes, proceed to Step 3.

Is the contributor a corporation, labor organization, federal government contractor, or foreign national (i.e., not an American citizen, and not lawfully admitted for permanent resident status (i.e., no "Green Card"))?

If yes, reject the contribution.

Is the contribution from a partnership, limited liability partnership, limited liability company, or unincorporated sole proprietorship?

If yes, reject the contribution.

An individual may contribute a maximum of \$5,000 per year to the Committee. Taking into account the current contribution, plus all other contributions from this individual to date, has the individual contributed more than \$5,000 per year?

If yes, reject the contribution, or the excess portion of it, as applicable.

If no, prepare the contribution for deposit. (See Internal Controls and Procedures, Section III)

## **Appendix 14 State and Local Chapter Formation**

State Chapters will be encouraged to be formed in states where there is a minimum of 50 members at the time of formation and 70 by the time they become a state chapter. Other members in adjoining states, who do not currently have a Chapter, can be members of a State Chapter in Formation (CIF).

Should a state not be able to maintain 70 members, they will be placed on probation for six (6) months in order to grow the membership. Should the state chapter still be unable to have the 70 members they will be disbanded.

NARPM will also assist by providing financial support to help get a state chapter started. NARPM will have funds set aside to have seed money to help get events set up. The seed money will be replenished through registration at the CIF events. The funds are kept in the National NARPM account and tracked on the balance sheet in the financials. The maximum amount provided will be up to \$10,000 for the first year, and up to \$7,500 for the second year. This seed money will alleviate the need for state chapters to charge dues initially to set up events. Once a CIF becomes a full chapter, all money in the Chapter balance sheet account will be forwarded to the Chapter.

State Chapters must have a name similar to National: (State) Association of Residential Property Managers.

Purpose of State Association:

- Helping property management industry with state and local law. Promote professionalism and help with training, education focuses on state landlord tenant law. To offer legislative support and advocacy.
- Coordinate getting together with people in their state so they do not feel they are on their own.
- Bundle chapters/members together to offer education by combining member numbers and allow smaller chapters to offer their members education.
- Assist in cultivating and developing leaders.
- Support local chapter as needed.

Relationship with local Chapters

- Critical that State chapters will assist National in supporting local chapters.
- Have state Board members visit assigned local chapters and try to get them involved in legislative arena, committees, and leadership on local levels.
- Assist with getting Continuing Education (CE) credits for courses chapters are offering.
- Vital to be able to translate information down the chain from National to local chapters.

NARPM State Conferences

NARPM will assist state conference with the following:

- Support in marketing the event to all NARPM members.
- Assist in finding additional keynote speakers who have been successful at National level and will fit their budget.
- National to assist in the coordination with hotel contracts.
- Promote conference to all members so they can attend

NARPM needs to be promoting more states to have State Chapters

- NARPM will not incorporate a state chapter until it is determined they can function on their own, which must be accomplished in a minimum of two (2) years, and no longer than four (4) years.
- States are encouraged to make money through their affiliates, sponsors, and conferences.

NARPM will support the state chapter for the first four years with:

- Along with the funding by members, the deposits to book hotels for state conferences will be needed. Chapter can use the seed money from NARPM National and as their event begins to make a profit, money will be set aside for future hotel deposits. NARPM will retain their funds on a balance line item as long as the state is a CIF.
- Support to hold Legislative program and educational offerings.
- Assist with partnering with other groups on legislative issues.

- States will fall under National for a minimum of 2 years and when ready, NARPM will assist in incorporating them individually.
  - Assist with campaign for membership recruitment and printing membership info.
  - Ensure the State Chapters have admin staff to assist in coordination of the activities.
- Volunteerism will drop off, which is the reason for admin support.

Local Chapter in Formation policy as approved

NARPM encourages the formation of State Chapters to assist local chapters.

Beginning July 1, 2018, a Local Chapter in Formation can be formed with a minimum of 35 members for the first 6 months and will be required to build membership to 50 members within the following 12 months. Should the chapter not be able to meet the requirement of 50 members, the chapter will be placed in conditional chapter status for an additional 6 months. It is the responsibility of the chapter to obtain good standing within six (6) months.

The Board of Directors approves requests for Chapter in Formations. National will assign a chapter number, update database and web page by adding the new chapter. The chapters will send National the information on the proposed chapter leaders. The President sends a letter of congratulations, inviting the chapter to attend the next Annual Convention. A press release is included in the mailing.

#### Separate Incorporation and Functions Required of Chapters

The local chapter shall be an incorporated entity formed under state laws and must provide documentation of its status to the National Association. National will assist in coordinating the chapter incorporation paperwork, in conjunction with local leaders.

Chapters may charge separate membership dues, and all billing and accounting must be separate from the National Association billings. If a Chapter charges separate local Chapter membership dues for the same classes of membership as NARPM National, Chapter will ensure that those local members are also National members (except for local affiliate members.) A NARPM Chapter will not collect National NARPM dues.

The local chapters shall adopt chapter bylaws for their governance which are not in conflict with the bylaws of the National Association. s. As a condition of becoming a chapter of the NARPM bylaws must be submitted to National.

Chapters must have membership categories consistent with the National Association . Chapters shall be self-governed and shall be responsible for the election of their own officers, holding of periodic chapter meetings (at least four (4) per year), and shall annually be required to submit to NARPM National chapter certification information. Chapters must complete elections as outlined in the Chapter bylaws. These elections are to be completed no later than September.

Chapter Presidents and President-Elects must attend required annual leadership training sponsored by NARPM National that are held annually each year. If either leader is unable to attend, NARPM National must be notified. Additional leaders can attend by paying separate registration fees, if charged.

#### NARPM Networking Groups

NARPM works with areas across the country on the formation of "area name" NARPM Networking Groups (NNG), prior to discussion on becoming a Chapter. The NNG will enable a group of members to join together to meet and discuss industry issues in their market area, without the requirements placed on a chapter. Each NNG shall have a "Group Leader" who will be responsible for the regularly scheduled meetings. The NNG leader will assign other volunteer positions as needed. These assignments will allow the NNG to find future leaders. The two (2) group leaders are to attend Chapter Leader training in November. NNG's are not afforded the same benefit as a chapter.

The NNG has the ability to function similarly to a chapter, without the requirements of having a minimum of members, completing chapter compliance, filing for incorporations, tax filings, etc. The NNG shall abide by all antitrust requirements, and other anticompetitive policies. NARPM does not oversee the operations of NNG's and will not be involved in their formation until such a time as they decide to become a Chapter.



The Regional Vice President (RVP) for the area will be limited to approving any chapter grant requests, or other documentation on behalf of the NNG, prior to being submitted to National. Once the NNG has been formed and desires to move forward to a Chapter in Formation, the NNG shall meet with the RVP, or their RVP Ambassador, who will assess if the NNG is strong enough to move forward. If it is determined that the NNG has the strength to move forward, the RVP/Ambassador shall be the one to recommend the next step that will be a "Chapter in Formation".

## Appendix 15 Travel Policy

### Board of Directors Travel

Travel Policy

Updated 2023

All expense reports are due no later than Dec 31 of each calendar year.

The following is the travel reimbursement policies:

#### General Travel Policy:

- Travel: is expected to be by the lowest and most efficient method of travel available, using coach fare, and purchased as soon as possible, but no later than 20 days in advance. Compare airlines if necessary. If the volunteer chooses to drive a personal vehicle, or use a rental car, a cost comparison with other means of travel may be requested to demonstrate the lowest travel cost was secured.
- Hotel: Room charges, including internet service, will be reimbursed if volunteer is within the budgeted allowance. NARPM will not pay for upgrades.
- Baggage fees: The limit of \$30 baggage fee that will not require a receipt to be submitted with expenses.
- Transportation: Use Hotel shuttles if available. NARPM will reimburse car rental fees at the same rate for the shuttle service or taxi fee, whichever is less, to and from airport/hotels. NARPM will not pay for parking or fuel of rental cars. Please make a note on the car rental receipt.
- Food: Actual cost for food, beverage, and tips with a max of \$75 per day (no alcohol) and is not cumulative.
- Tips: A maximum of \$5 each tip with a maximum daily amount of \$10.
- Maximum reimbursement (includes airlines tickets, hotel charges, food, etc.) will be based on amounts requested in budget for volunteer/event.
- Receipts must be submitted for any expenses, along with reimbursement form, within 30 days after event has ended.
- Long distance phone charges will not be reimbursed.
- Parking and mileage to/from airport for personal vehicle will be reimbursed. An airport limo/taxi may be taken to the airport if the charges are less than or equal to mileage and parking.

#### RVP's and Leadership Travel:

- Internet usage: Board of Directors will be reimbursed internet usage on airlines to allow them to continue their business while traveling on behalf of NARPM. Receipts for internet usage during trip must be attached to reimbursement requests. If annual contracts are secured then NARPM will reimburse for month that traveling occurs.
- Broker/Owner Conference & Expo and National Convention: NARPM Board of Directors attending Board meetings will be entitled to receive reimbursements of expenses. When attending a board of directors meeting at the Broker/Owner Conference & Expo and National Convention, members will be reimbursed for expenses for the entire convention/retreat which includes registrations fees (not ticketed events) days for attendance at the Board of Directors meeting. NARPM will reimburse all travel expenses within the individual's approved budget.
- State Conferences: NARPM shall also reimburse Directors/RVP's to attend those state conferences that are held and/or sponsored by their respective regions for three (3) days to attend the event. The President and President-Elect will be reimbursed for travel to all NARPM National related events.

- Chapter Visits: RVP's are encouraged to travel to individual chapters once a year. If a second chapter visit is needed, the trip will need to be approved by the Executive Committee thirty (30) days in advance, if RVP will be over their respective budget. Since Chapters have use of Trade Show grants for state conferences, RVP's will not be reimbursed to attend the same state trade shows. Chapters are given funding for necessary support through the grants. A Chapter visit is limited to be reimbursed up to 2 nights.
- Chapter Events: When traveling to a chapter the RVP's must be available to meet with members to help with local issues. Spend time equally with any member who requests your attention, and not just with a few. A Chapter visit is limited to be reimbursed up to 2 nights.
- President Chapter Visits: The President will go visit chapters when they are grouped together in a trip. Individual chapter visits are discouraged as other chapters will expect visits also. It is the RVP's responsibility to visit individual chapters.
- Events: Board of Directors will be reimbursed for any event the President determines to be mandatory, with the Board of Directors approval, for Board members to attend. This is to include any training, ticketed events, etc..
- President, President-elect, Treasurer and CEO will attend a leadership training course at the end or beginning of the year.

Convention Chair to be reimbursed for the convention registration.

Committee Chairs travel to board meetings during events shall be limited to event registration fee and the extra night room to stay for board meeting; and \$75 per-day food.

Reimbursement requests must be submitted within 30 days after incurring an expense and prior to December 31, of the year the expense is incurred. If reimbursements are submitted after 30 day time frame, approval will be required from the Finance Committee prior to payment being issued to the volunteer.

Clarification:

Please make notes on receipts of the amount to be reimbursed. Where available, use long term parking at airports, no short term parking will be reimbursed, unless long term parking is not available. Plan additional time to board your flight. All travel, included to and from airport, is expected to be by the lowest cost available. This means you are responsible for checking into the most economical means of travel, even from your home to the airport. NARPM will pay mileage plus long term parking. All volunteers are to plan their visits so they fall within their budget. Any overage must be approved by the finance committee prior to spending on the travel. Reimbursements will only be made to volunteers after the event has taken place. NARPM will not advance any travel reimbursement prior to an event being held.

Prior approval must be obtained from the Finance Committee should exceptions to this policy be needed by the volunteer before

All expense reports are due no later than Dec 31 of each calendar year.

Policy for staff credit cards:

NARPM management team travels on behalf of NARPM to various meetings. Management is required to follow the travel policy as set forth for NARPM volunteer leaders.

Each NARPM staff that travels has possession of a credit card issued through NARPM. When traveling, team members are to use the individual cards issued to them to pay for their own expenses. The other option for paying expenses is to assign charges to respective sleeping room. This will enable clear tracking of expenses by each individual team member. If expenses of more than one team member needs

to be combined for some reason on an individual's credit card, prior approval must be obtained from the NARPM CEO.

At the conclusion of traveling, credit cards must be balanced immediately upon receipt of bill. If receipts are missing and a missing receipt form must be completed, the form is to be submitted to the CEO for approval before attaching to the credit card bill. It is the responsibility of the person who has the credit card to obtain receipts for purchases. Photos can be taken of receipts and submitted with expense form. Use of the missing receipt form is to be used as a last option and should be rarely used.

## Appendix 16 – Sexual Harassment

### Conduct Covered by the Sexual Harassment Policy:

This policy applies to and prohibits all forms of illegal harassment and discrimination, not only sexual harassment. Accordingly, the Association absolutely prohibits:

- Harassment or discrimination based on sex, age, disability, perceived disability, marital status, personal appearance, sexual orientation, gender identity, race, color, religion, national origin, veteran status, or any other legally protected characteristic.
- Sexual Harassment: Because confusion often arises concerning the meaning of sexual harassment, it deserves special mention. Sexual harassment may take many forms, including the following:
  - Offensive and unwelcome sexual invitations, whether the employee or volunteer submits to the invitation, and particularly when a spoken or implied quid pro quo for sexual favors is a benefit of employment, continued employment, or advancement within NARPM by a volunteer leader;
  - Offensive and unwelcome conduct of a sexual nature, including sexually-graphic spoken comments; offensive comments transmitted by e-mail or another messaging system; offensive or suggestive images or graphics whether physically present in the workplace or at a volunteer event/meeting or accessed over the Internet; or the possession of or use of sexually suggestive objects; and
  - Offensive and unwelcome physical contact of a sexual nature, including the touching of another's body; the touching or display of one's own body, or any similar contact.
  - Computer Messaging and Information Systems: Employees and volunteers are particularly cautioned that the use of e-mail, voice mail, or other electronic messaging systems, or the Internet, may give rise to liability for harassment.
  - Employees and NARPM members may not generate, and must not forward, any message or graphic that might be taken as offensive by a NARPM employee or member based on sex, gender, or another protected characteristic. This includes, for example, the generation or forwarding of offensive "humor" which contains offensive terms.
  - Employees or members receiving offensive messages from a NARPM employee or member, should report those messages to NARPM's Chief Executive Officer (CEO). In the event the complaint is against NARPM's CEO, NARPM's President should be notified.
  - Employees are reminded that the Association's computers and the data generated on, stored in, or transmitted to or from the Association's computers remain the property of the Association for all purposes. The Association retains the right to monitor its computers, computer systems, and networks to ensure compliance with this requirement.

Procedures in Cases of Alleged Harassment: Any Association employee or member who believes that she or he has been subjected to unlawful harassment of any kind has the responsibility to report the harassment immediately to the appropriate individual stated above (In almost all cases NARPM's CEO). NARPM is committed to taking all reasonable steps to prevent harassment and will make every reasonable effort to promptly and completely address and correct any harassment that may occur. However, the Association cannot take prompt and effective remedial action unless each employee or member assumes the responsibility of reporting any incident of harassment immediately to NARPM's CEO.

Every report of harassment will be addressed promptly and impartially, with every effort to maintain employee and/or member confidentiality.

Towards that end, an employee or member should engage the following procedures when he or she feels Harassed:

1. Notify the NARPM CEO immediately via electronic message, phone or in person if at a NARPM event/meeting or at the NARPM office. ***If the employee or member feels they is in imminent danger call 911.***
2. NARPM's CEO will then inquire of the Complainant as to whether they chooses to file a formal complaint with NARPM.
3. If the Complainant chooses to file a formal complaint, they must send formal Notice to the NARPM CEO via first class mail to NARPM's headquarters or electronic message (return receipt requested) describing the date of the incident, the name of the alleged harasser, and any circumstances giving rise to the formal complaint. ***If this is a NARPM Employee-to-Employee complaint the NARPM CEO will make a decision regarding discipline (Number 3 onward will not apply).***
4. The formal complaint will then be forwarded to the Respondent with a deadline to file a written response within 15 days of NARPM forwarding the complaint. The Respondent should send his or her response to the NARPM CEO via first class mail to NARPM's headquarters or electronic message (return receipt requested). The Complainant will have the opportunity to review the response before a formal hearing.
5. When the aforementioned procedures have been followed, NARPM's President will appoint a panel of three (3) NARPM Board of Directors members and two (2) alternate NARPM Board Members. The Complainant and Respondent will be notified of the names of the Panel Members and Alternates before any formal hearing convenes, and they will have the right within fifteen (15) of notification to object to any Panel Member they reasonably believe will deprive them of due process.
6. After the aforementioned procedures have been followed, a three (3) member NARPM Board of Directors Panel will convene within 45 days after the initial complaint to hear opening statements from both parties; the parties will then be given five (5) minutes to cross-examine each other; at any point a Panel Member can ask questions of the Complainant and/or Respondent; the parties will then have the opportunity for a ten (10) minute closing statement; and the parties will be dismissed so the panel can deliberate, and then dismiss the complaint or impose sanctions.

Both the Complainant and Respondent have the right to an attorney to advocate, within the time limits set forth above, their client's position. Also, witnesses that can provide relevant testimony may be called by either party. However, any witness will only be permitted to participate in the hearing during the time in which they are testifying and answering questions. The parties will notify NARPM if they retain an attorney or plan to call witnesses with ten (10) days of the hearing, and NARPM will forward that information to the other party.

The Standard of Proof the Complainant must meet to prevail is a preponderance of the evidence.

The Complainant and the Respondent will be informed of the results of the hearing within fifteen (15) days after the hearing ends. If the Association finds that this Harassment Policy has been violated, it will take appropriate corrective and remedial action, up to and including discharge of a NARPM offending member.

Reporting Without Fear of Retaliation: No Association employee or 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.

## **APPENDIX 17 RVP duties**

REGIONAL VICE PRESIDENT: All RVPs also serve on the Board of Directors.

### **DUTIES & RESPONSIBILITIES**

OVERVIEW: The Regional Vice President (RVP) of the National Association of Residential Property Managers (NARPM) will include one (1) Board member representing each of the Association's Regions who are elected to oversee the work of NARPM. Note: RVPs can be assigned to more than one region if a region has less than 250 members. These individuals will act as the representatives of the NARPM President in such matters as may be assigned to them. In addition to serving as the spokesperson for the Association in their respective Region, the RVP will work closely with the Member Services Committee, the Chapter Support Manager, and the Chief Executive Officer to identify problems or opportunities within their Region(s) and assist wherever possible.

The RVP will supervise their assigned Region(s) of NARPM. The NARPM President, the Regional Ambassadors, Chapter Presidents, or their assignees, Committee Chairs, and National staff will work closely with the RVPs to provide the most beneficial services and programs to their members.

It is the responsibility of the RVP to notify the Chapter Support Manager and/or Chief Executive Officer of any assistance they may need throughout the course of their duties and responsibilities. If it is deemed during the term of the RVP that any of the required duties are not met, followed and practiced in good faith, then the respective RVP could be removed from the National Board of Directors by a majority vote of the National Board of Directors.

#### **REGIONAL TEAM (to be established by 9/15 of each year)**

All RVPs shall have a team comprised of the Regional Vice President, who shall act as Chair, RVP Ambassadors, along with Chapter Presidents or their assignees that will assist with the oversight of the Region and its activities.

The RVP role is designed to be successful with at least two Regional Ambassadors.

Each Region shall have a team of at least two Ambassadors, to be selected no later than September 15 of each year. Regional Ambassadors must apply for the position no later than September 1 and be approved by the incoming President & President Elect.

Staff can find the Ambassador Application by following this link: [NARPM Ambassador Application](#)

The RVP will oversee the Ambassadors, along with all Regional activities. The RVP Ambassador's role is to assist the RVP and/or be assigned specific Chapters within the Region.

Some examples of the Regional Ambassador support –

- Send welcome letters/emails to the new members.
- Assist in putting together the agenda for Regional Chapter Leader virtual meetings/conference calls.
- Write the virtual meeting/conference call email invitations.
- 
- Follow up with members who have dropped out due to non-renewal.
- Travel to Chapters for visits.

RVPs are to delegate and use their Ambassadors to assist with the management of the Region. Ideally, one of the Ambassadors would remain during the transition from one RVP to another. This will maximize the continuity within the Region.



## REQUIRED MEETING ATTENDANCE

In order to maximize your effectiveness for the organization, and promote NARPM to its fullest, the RVP is required to attend meetings throughout the year. If at any time an RVP is unable to attend a Board meeting, at least 14-days advanced notice is required to be submitted to the President and Chief Executive Officer for consideration of an excused absence. Excused absences must be approved by the Board of Directors. One (1) unexcused absence or two (2) excused absences within the year of service will be grounds for replacement of that Director.

### National Board of Director Meetings – Usually six per year

- 3 Virtual Meetings
- Usually last about 2 – 3 hours
- Held in the months when there is not an In-Person meeting
- 3 In-Person
- Broker/Owner Conference (Usually in the Springtime)
- Next years' Annual Convention site (August)
- Current Year Annual Convention (October): Incoming Directors are to attend this meeting.
- Two Weeks before meeting - All reports are to be submitted to National Staff two weeks prior to meeting
- One Week before meeting - Review meeting Agenda and submit questions to Chief Executive Officer

### Annual Strategic Planning & Board Training (September of each year – 3 day event)

- Returning and Incoming RVPs to attend
- Hotel accommodations arranged by NARPM National Staff and paid for by NARPM National
- Cost is covered by NARPM National consistent with NARPM's Travel Policy.

### Annual Leadership Chapter Meet up (End of Convention)

- RVPs, Ambassadors and Incoming Chapter Presidents are to attend.
- Chapter leaders are encouraged to attend to meet with their RVP and other leaders in their Region.

### Nutes & Bolts Virtual Training (November) 2-3 hours

Training for Chapter leaders on what NARPM National offers. How to be a successful leaders and proper usage of the tools that national has available for chapter leaders.

### Regional Chapter Leader Meetings (Virtual Meetings – 1 hour event)

- While four are recommended; RVPs and Ambassadors should be making personal check- ins with their Chapter Presidents.
- The dates of your meetings will be arranged with the help of the Chapter Support Manager. This is necessary because the Chapter Support Manager will attend every regional call.
- Agenda to be submitted to Chapter Support Manager at least 10 days before meeting. The Chapter Support Manager will distribute the agenda at least one week prior to the meeting.

### Chapter Visits (Visit every Chapter in two-year term)

Be aware of the Chapters status, and if any are not doing well, Provide them with guidance and expertise in getting them back on track. Reminder, a struggling Chapter is one that has a 5 or lower on their Health Assessment. This includes engaging and working with the National staff and any National Committee(s), as needed. This will be accomplished by spending time discussing the issues and brainstorming solutions or finding other Chapters/members to help this Chapter or it might mean traveling to this Chapter to do whatever might be reasonably needed. Develop and help administer an action plan for struggling Chapters. This plan is to be mutually developed with the local Chapter leadership team and to be utilized by the local Chapter President, President-Elect, Chapter Support Manager, and other Chapter leaders.

It is recommended that you engage your Ambassador to help with any struggling Chapters.

- Every Chapter visit should be productive and bring added value to the members.
- A variety of topics are available for a short presentation at [www.NARPM.org](http://www.NARPM.org) or simply take a few minutes to report on National activities (Strategic Planning, Broker/Owner Conference, etc.).
- Up to two nights' travel are eligible for reimbursement when traveling to a struggling Chapter.

- RVPs or their Ambassadors must make a good faith effort to visit every Chapter once within their two-year term.
- If it is a struggling Chapter a second visit may be needed (Struggling chapter is one who has a 5 or lower on their Health Assessment).
- Focus should be placed on Chapter needs when evaluating Chapter visits.
- Be sure to use the Chapter Health Guide for each Chapter visit.
- Two weeks prior to visit – Send the Chapter Health Guide to the Chapter President and review it with them after their meeting.
- One week after visit - Provide feedback to the Chapter President. What are they doing well, what could they improve upon, be sure to include suggestions and not just criticism.

#### Regional/State/Area Conferences

The RVP is required to offer support and make a good faith effort to attend any State and Conferences held in their Region.

#### TRAVEL GUIDELINES

When traveling to fulfill the duties of RVP be sure to consider the most cost effective way to meet your goals. All flight arrangements are to be completed by the RVP. There are events where National Staff arranges your hotel accommodations. Staff will inform volunteers each year of travel responsibilities. RVP's and officers are to make their own travel arrangements to local, regional, and state events.

Each RVP will be given a budget for the year. This budget is to be strictly adhered to and shall include expenses incurred by the Regional Ambassadors. The RVP will also be given a Travel & Expense Report from National Staff. All reimbursable expenses are to be submitted by using this report within 30 days of the travel event. All expense reports are due no later than Dec 31 of each calendar year.

All the details regarding the NARPM travel policy can be found by following this link: [Valuable RVP Documents](#)

If you attending an event as a NARPM Board Member, it is important to engage with the membership by attending as many of the sessions, including the Affiliate Fair, as possible. Should you find it necessary to take a break to handle business or other needs, you are to go to a private location where members are not present. If you will be absent from the event for an extended period of time, please inform the Chief Executive Officer or someone else on the Executive Committee.

#### COMMUNICATION

Successful communication is the key to becoming the most effective RVP you can be. Be sure to copy all interested parties, especially the Chapter Support Manager and your Ambassadors in email communications. All communication between National staff and Board members should not exceed a 48-hour response time from either party.

To make your communication easier, set up email groups for the various Chapters or Chapter leader groups.

- RVP Reports (At least six per year – due two weeks prior to Board Meeting)
- National Staff will provide a report format for the RVP to complete and submit two weeks before each Board of Directors meeting.
- Reach out to your Chapter Leaders at least one week prior to the due date of your report.
- Read the report thoroughly and be sure to fill out all areas completely.
- Residential Resource Magazine Article - Each RVP is required to submit an article twice per year (750 words). This article is to highlight your Region, the activities going on and any upcoming notable events. Due Dates for the articles will be assigned by National Staff.
- Each RVP is also required to assign two Chapter Leaders to submit a Chapter Spotlight article featuring their Chapter. The Chapter Spotlight article and the RVP Bulletin article will be published in the Residential Resource at the same time.
- New Member Email Notifications
- Each time a new member from your Region joins NARPM the RVP and Chapter Leader will receive an email notification.

- The RVP should immediately e-mail the new member welcoming them to their Region and copy the Ambassador and the local Chapter Leader. Sample welcome email can be found within the [Valuable RVP Documents](#)

#### Chapter Visits

- After visiting a Chapter, the RVP is required to submit the completed Chapter Health Guide to National Staff where it will be kept on file for the Chapter. Expense reimbursements will not be processed without the completed Chapter Health Guide.

## APPENDIX 18 Document Retention & Destruction Policy

National Association of Residential Property Managers  
Document Retention & Destruction Policy  
February 3, 2009

This Document Retention and Destruction Policy of NARPM identifies the record retention responsibilities of, volunteers, members of the Board of Directors, its Management Company, and outsiders for maintaining and documenting the storage and destruction of NARPM documents and records.

1. Rules. NARPM volunteers, members of the Board of Directors, management company staff, and outsiders (i.e., independent contractors via agreements with them) are required to honor these rules: (a) paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the management company; (b) all other paper documents will be destroyed after three years; (c) all other electronic documents will be deleted from all individual computers, data bases, networks, and back-up storage after one year; and (d) no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.

2. Terms for retention.

a. Retain permanently:

Governance records – Charter and amendments, Bylaws, other NARPM documents, governing board and board committee minutes.

Tax records – Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits.

Intellectual property records – Copyright and trademark registrations and samples of protected works.

Financial records – Audited financial statements, attorney contingent liability letters.

b. Retain for ten years:

Pension and benefit records – NARPM® has no employees or benefit plans.

Government relations records – State and federal lobbying and political contribution reports and supporting records.

c. Retain for three years:

Employee/employment records – NARPM® has no employees.

Lease, insurance, and contract/license records – Software license agreements, vendor, hotel, and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during the term of the agreement and for three years after the termination, expiration, or non-renewal of each agreement).

d. Retain for one year:

All other electronic records, documents and files – Correspondence files, past budgets, bank statements, publications, employee manuals/policies and procedures, survey information.

3. Exceptions. Exceptions to these rules and terms for retention may be granted only by NARPM® Chief Executive Officer or the President.

## Appendix 19 Affiliate Member Code of Conduct

As defined in this code, NARPM member is any classification of membership within the organization.

Article 1 The Affiliate Member (Affiliate) shall provide equal professional service to any NARPM Member (Member) or other person including but not limited to the protected classes as described in *federal, state, and local laws*.

### Article 2

The Affiliate shall be informed and do business in accordance with laws, governmental regulations, licensing requirements, and public policies in the field in which the Affiliate customarily engages.

### Article 3

The Affiliate shall provide a level of competent service in keeping with the standards of practice in the field in which the Affiliate customarily engages.

### Article 4

The Affiliate shall promote business in a positive and professional manner based on individual merit and those of the Affiliate Company. Affiliates are required to use professional courtesy and consideration at all NARPM events and refrain from undesirable activities. Undesirable activities by non-sponsoring Affiliates at NARPM events where paid Affiliate sponsors are in attendance include, but are not limited to, attendance, actively marketing their business, distributing marketing materials or business cards, holding offsite events, or making negative remarks about sponsoring Affiliates.

### Article 5

The Affiliate shall not disparage competitors in an attempt to gain business. The Affiliate shall not attempt to gain any unfair advantage over competitors by knowingly or recklessly making false or misleading statements about competitors or NARPM Members.

### Article 6

The Affiliate shall not undertake activities that compromise or interfere with the contractual business relationship NARPM Members have with their customers and clients.

### Article 7

Affiliate members will aspire to follow the rules and regulations contained in the Code of Ethics of the NARPM. This would include cooperation in any disciplinary proceedings or investigations conducted by the investigative body.

### Article 8

The Affiliate shall fully comply with RESPA, as well as the Affiliate's own industry standards, when money or any item of monetary value is paid by the Affiliate to a Member in return for business, referrals, or preferred statuses.

## Process for handling code violations

### Complaint Submission

Anyone who believes that a NARPM Affiliate Member has violated the NARPM Affiliate Code of Conduct may submit a written complaint ("Complaint") to NARPM. The person submitting the complaint is the "Complainant" and the person against whom the Complaint is alleged is the "Respondent."

All Complaints shall be submitted to NARPM National's office. Any proper Complaint, submitted in compliance with the instructions, shall then be forwarded to the Investigative Body for review. It must first be determined if there is a conflict with the Investigative Body who is composed of President-Elect, Member Services Chair, Affiliate Subcommittee chair and Chief Executive Officer (CEO) (or other assignees). Should there be a conflict the President shall assign new members of the Investigative Body. Should the conflict be with the President, then the President Elect will assign the new members.

### Complaint Review

The Respondent(s) shall be provided with notice from the NARPM CEO of the Complaint and an opportunity to respond in writing within 20 days of receipt of the notice. If a Respondent fails to respond to the notice in the time allotted, the allegations against the Respondent in the Complaint may be deemed to be fact. Copies of all submissions from the Complainant or Respondent(s) shall be provided to all parties.

If a Complaint alleges violations of multiple Articles of the Affiliate Code of Conduct, or multiple violations of the same Article in separate instances, each alleged violation shall be considered as a separate count, to be reviewed and ruled upon.

The Investigative Body may amend the Complaint by adding or removing Articles of the Affiliate Code of Conduct. If changes are made to the Complaint after notice has been provided to Respondent(s), notice of the amended Complaint shall be provided to both Complainant and Respondent(s) with the opportunity to respond. Should the Complainant not agree with the amendment, he or she may appeal the amendment, and request that the original Complaint be reviewed.

It is the responsibility of the Complainant to supply sufficient evidence to show that the Respondent(s) violated the NARPM Affiliate Code of Conduct. It is not the duty of the Investigative Body, or any other representative of NARPM, to find evidence outside the case presented by the Complainant. Only the documentation submitted pursuant to the Complaint and response will be reviewed. Nevertheless, the burden of proving the allegations in a Complaint falls on the Complainant, who must provide clear and convincing evidence that a NARPM member has violated the NARPM Affiliate Code of Conduct.

The Investigative Body will meet in executive session to decide on all counts of the Complaint. For each count, the Investigative Body shall decide, based solely on the evidence presented, whether the Respondent has committed a violation of the NARPM Affiliate Code of Conduct. If a violation is found, the decision will also impose sanctions. The decision of the Investigative Body, including any specified sanctions, shall be sent to the Respondent(s) and the Complainant within 10 days of its issuing.

#### Process and Sanctions

Upon receipt of the complaint the Chief Executive Officer shall send a letter to the Affiliate member holding the main membership, notifying them of the violation and requesting a response to the complaint.

- Once the assigned Investigative Body has reviewed the complaint and response, a letter will be sent to the Affiliate notifying them of the determination of the Investigative Body, and the sanction applied.
- After the investigative body meeting, should the members involved determine that a violation occurred, one of the sanctions below shall be sent to the affiliate:
  - Letter of warning
  - Letter of warning with a probationary membership period if no complaints filed within a two (2) year period
  - 1 year probation from attending any NARPM National events
  - Suspension of membership for a stated period not less than thirty (30) days or more than one (1) year, with automatic reinstatement of membership in good standing at the end of the specified period of suspension.
  - Suspension of membership with no reinstatement privilege, for a specified period of one (1) to three (3) years. Affiliate member must apply for membership to be reinstated after the specified period has ended. Approval of application shall be based on merits of application at the time it is submitted.
  - Expulsion from NARPM affiliate membership with no opportunity for reinstatement. Member company will permanently lose all rights to use NARPM logo.

#### Appeals

Both the Complainant and the Respondent shall have the right to appeal any dismissal or amendment of a Complaint, or a decision issued by an Investigative Body. An appeal must be submitted to NARPM Nationals office, within twenty (20) days of receipt of notice of the respective dismissal, amendment or Investigative Body decision. The appeal must be submitted on the applicable appeal form provided by NARPM, and must include a statement explaining why the appeal should be considered. It must be accompanied by a \$200 administrative fee.

Neither the Complainant nor the Respondent(s) may be present at any appeals review session, and neither may submit any additional information in support of or against the Complaint, other than what was submitted for the initial review. An appeal of a dismissal or amendment shall be reviewed by the President. Based only on the information available at the time the determination for dismissal or amendment was made, the President will either dismiss the appeal, or grant the appeal and submit the original, un-amended Complaint for review. If the appeal is granted, the NARPM Board of Directors shall form an Appeals Panel, composed of three directors, who will review the appeal. The Appeals Panel will reach a decision to: (i) confirm the Investigative Body's decision; (ii) amend the Investigative Body's decision, including instituting alternative sanctions; or (iii) overturn the Investigative Body's decision and send the Complaint back for a new review by a new Investigative Body, as assigned by the President. Should the conflict be with the President, then the President Elect will assign the Investigative Body. The Appeals Panel will issue a concise, written decision, which shall be sent to all parties, and may not be appealed.

#### Deliberations

An attorney representing NARPM may be present and offer advice for any deliberations contemplated under these procedures.

Majority vote applies for all actions taken an Investigative Body, or an Appeals Panel.

#### Final Decisions

All final decisions regarding Code of Conduct violations shall be retained in the applicable member's records with NARPM for a period of five (5) years and may be reviewed and considered in relation to any subsequent Complaint filed against such member during that time period.

#### Member Resignation

If a NARPM affiliate member resigns from membership before a decision is issued on a Complaint against the member, the Complaint review process shall be suspended. If the NARPM affiliate member should attempt to rejoin NARPM at any time thereafter, NARPM may choose to reopen and process the Complaint.

## Appendix 20 Broker Owner Conference & Expo Policies

This policy was developed to guide the committee responsible for bringing the Broker/Owner Conference and Expo to fruition.

The purpose of the event is sharing successes by helping members build better businesses.

The Broker Owner conference shall be maintained as a premier event only for company owners, brokers, and major decision makers. This event shall remain a high-level event that will strive to attract other high-level individuals involved in our industry.

This event is about educating industry leaders how to build a better business and shall be focused on owner and broker topics, not on property manager topics that are taught at conventions.

- The NARPM CEO has final say on all decisions.
- The committee is encouraged to bring in high-level paid speakers that can provide quality business/owner/broker information that our members do not have the expertise to provide. These speakers will open each day in a general session.
- The committee shall ensure that all speakers shall be educational, value-added speakers, not motivational or entertaining speakers. Motivational speakers should be used for Convention.
- The committee shall limit the same speaker teaching more than one session. This includes avoiding speakers doing a general session and then a breakout session, and sitting on panels, teaching similar topics to each other. One speaker, one session, shall rule the day, unless approved by CEO in advance.
- Each day the event will have an opening paid speaker. Amounts paid to the speakers can be increased, or decreased, as needed through the annual budgeting process. NARPM will create a competition to bring quality member speakers. NARPM places the highest value on members teaching members. It also sets the same value on the topics and quality of content provided. To bring this valuable content to the members, NARPM will entertain proposals from the membership to present at Broker/Owner. Up to three of the best presentations/speakers may be selected. Likewise, none may be chosen if the presentations don't meet the NARPM Broker/Owner standard. Each presenter selected will receive a \$7,500 speaking fee. \$1500 will be paid to presenters for breakout sessions. Panel members will not be paid to present.
- If possible, Affiliate Partners will be used in the program in either a breakout or panel discussions.
- Use Affiliates for speaking/presentations and remind them that marketing of their company is not allowed. Use those that are cutting edge. Make sure they are vetted and reminded they cannot sell their product during their presentation.
- NARPM professional members who teach must receive 4 or more stars over the last 4 years.
- If the professional member is a new speaker, with little to no experience, NARPM will allow them to present in TED Talk style speaking or short breakout sessions.
- The new speaker must earn a rating of 4 or higher. If they wish to speak at other events, they must maintain an average over 4 years of a 4 or higher rating. This will also allow the committee to vet speakers for future events to ensure there are quality sessions being offered.
- The length of sessions shall be no more than 50 minutes for breakouts and 10-15 minutes for shorter sessions for those with limited and unproven speaking experience (TED Talk style sessions).
- Networking has always been an integral part of what makes NARPM the organization that it is. The committee should create dedicated, organized, opportunities for members to network.



- The committee shall require all presenters to have their presentations submitted 45 days in advance of the event. Speakers will not be allowed to carry presentations to the event and expect it to be incorporated.
- The committee shall recommend topics to be covered but allow all presentations to be submitted and considered.
- The committee is encouraged to have each day of the event represent a specific subject matter or theme, as opposed to a breakdown by company size.
- The committee is encouraged to use video to market the event. If possible, have a NARPM Affiliate assist with the marketing ideas and suggestions since they know the market and have customers who are non-members. Request Affiliates to promote the event with videos to their customer database.
- The Staff shall contract to have videos created for all the sessions and provide them post-event to the attendees and include the cost in the registration fee.
- The committee chair will be responsible for developing continuity on the planning committee through an application process where applicants must be approved by the Event Chair, and Vice Chair. Their approved recommendations will be forwarded to the National President and President-Elect for final approval.
- Committee members will serve a one-year term and may be reassigned up to two (2) additional years. Committee members must be professional members. An affiliate can be appointed to assist with the Marketing of the event as needed and approved by the CEO. The Chair of the Affiliate Advisory Council will work with the Meeting Planner on the Trade Show
- The Chair and staff will make sure that members who apply to serve on committee are vetted. The vetting process will include checking to ensure that the member has a proven track record of following through on volunteer assignments and commitments.
- There shall be no more than 12 people who will serve on the main planning committee. (not including the Chair and staff). However, subgroups can be used to help with room hosting and other items to support the main committee.
- The Broker/Owner Chair shall hold the position of National Committee Chair who is encouraged to attend the Board Meeting at Broker/Owner.
- The Vice Chair shall be selected by the National President and President-Elect from the current committee members and that person will ascend to the position of Chair the following year. Input from the current chair should be solicited to assist in making decisions.
- The committee shall be as diverse as possible. Its makeup should include differing age groups, genders, and company sizes. Each committee member shall have been in business as a company owner for a minimum of three (3) years.
- If a committee member misses more than two (2) meetings they will automatically be removed from the committee. A replacement committee member will be sought, if that is a prudent action for the situation.
- Registration rates reflect the high quality that is to be expected by the attendees for the event. The registration rate is set through the budget to ensure the event makes a minimum of a 10% profit. The registration rates shall be re-visited through the budgeting process and adjusted as needed.
- The established cap for the number of attendees shall be 13% of the Professional and Associate members. This cap is used to work toward selling out that established number of registrations and an exclusive event. Ensure that all attendees are Brokers, Owners, and/or major decision makers.
- Staff shall establish sponsorships to bring in additional revenue for the event, moving beyond just booth sales and looking at other potential revenues that can be generated through sponsorships.

- The committee and staff are encouraged to market the event outside of typical NARPM channels. Social media will be used to promote the event.
- The Staff shall enhance the audio/visual experience for the attendee by hiring a professional company to handle this aspect of the event.
- The hotel choice is important, and the quality of the hotel should match the level of the attendees. Broker Owner event shall use higher end hotels/resorts for this event.
- Every three (3) years a task force should be appointed to ensure the event remains a premier event only for company owners, brokers, and major decision makers that is relevant for the property management industry.
- The Broker Owner Committee Chair and National President are not required to pay registration fees or purchase special convention event tickets. President will receive a two (2) bedroom suite and the Broker Owner Chair will receive a room which are comped.

## Appendix 21 Annual Convention and Trade Show Policy

This policy was developed to guide the committee responsible for bringing the Annual Convention and Trade Show to fruition.

- The NARPM CEO has final say on all decisions.
- The committee shall maintain this as a premier event only for those actively engaged in the management of residential properties as an agent for others and their support staff.
  - This event shall be focused on property manager and motivational topics.
  - Attendees are split 50/50 on those who desire an outside business speaker and those who want member teaching members.
- Each day the event will have an opening paid professional speaker. Amounts paid to the professional speakers can be increased, or decreased, as needed through the annual budgeting process. The other general session speakers shall be professional NARPM members that are well known and have taught at NARPM or other property management events and received high reviews. NARPM will not charge the professional members who are general session or break out speakers the event registration fees. NARPM professional members who teach must receive 4 or more stars over the last 4 years. If the professional member is a new speaker, with no to little experience, NARPM will use them in TED Talk style speaking or short breakout sessions. If they wish to speak at other events they must maintain an average of a 4 or higher rating. This will also allow the committee to vet speakers for future events to ensure there are quality sessions being offered.
  - The length of sessions shall be no more than 50 minutes for breakouts, and 10-15 minutes for shorter sessions for those with limited and unproven speaking experience (Ted Talk style sessions).
  - The committee is encouraged to bring in high-level paid speakers that can provide quality information that our members do not have the expertise to provide. These speakers will open each day in a general session.
  - Affiliate Partners will be used in the program in either a breakout or panel discussions.
  - All speakers shall be educational, value-added speakers. Motivational speakers can be used at conventions.
  - The committee shall avoid having the same speaker teach more than one session. This includes avoiding speakers doing a general session and then a breakout session, and sitting on panels, because “they are already there, and we need to get our money’s worth.” One speaker, one session, shall rule the day, unless approved by CEO in advance.
  - The committee shall rigorously vet all the speakers. If needed, use Zoom webinar to vet the speakers with a subgroup of the committee. Presenters should submit short video of their making prior presentations which will enable the committee to see the presentation style of applicant. Review past sessions and attendee ratings. Ask for other events where they spoke and the contact so committee may contact event coordinator.
- The committee is encouraged to use video to market the event. If possible, have a NARPM Affiliate assist with the marketing ideas and suggestions since they know the market and have customers who are non-members. Request Affiliates to promote the event with videos to their customer database.
- The Staff shall contract to have videos created for all the sessions and provide them post-event to the attendees
- Committee members will serve a one-year term and may be reassigned up to two (2) additional years. Committee members must be professional members. An affiliate can be appointed to assist with the Marketing of the event and assist with the Trade Show, as needed, and approved by the CEO.
- The Chair and staff will make sure that members who serve on the committee are vetted. The vetting process will include checking to ensure that the member has a proven track record of following through on volunteer assignments and commitments.
- The Vice Chair shall be selected by the National President and President-Elect from the current committee members and that person will ascend to the position of Chair the following year.
- The committee shall be as diverse as possible. Its makeup should include differing age groups, genders, and company sizes
- If a committee member misses more than three (3) meetings they will automatically be removed from the committee. A replacement committee member will be sought, if that is a prudent action for the situation.
  - The registration rates shall be revisited through the budgeting process and adjusted as needed.
  - Make sure, when possible, the trade show is close to the meeting space and there is adequate space for the show.

- The committee shall recommend topics to be covered but allow all presentations to be submitted and considered.
- Staff shall establish sponsorships to bring in additional revenue for the event, moving beyond just booth sales and looking at other potential revenues that can be generated through sponsorships.
- The committee and staff are encouraged to market the event outside of typical NARPM channels. Social media will be used to promote the event.
- The Staff shall enhance the audio/visual experience for the attendee by hiring a professional company to handle this aspect of the event.
- Use Affiliates for speaking/presentations and remind them marketing of their company is not allowed. Use those that are cutting edge. Make sure they are vetted and reminded they cannot sell their product during their presentation.
- Have the Affiliate Advisory Council (AAC) Chair, (or their assignee), who understands the policy on presentations, review with each of the affiliate presenters what they need to do and say and not say.
- AAC Chair (or their assignee) to sign off on the presentations prior to submissions to NARPM National.
- Included in the affiliate speaker introductions during a breakout session the NARPM policy that affiliates are not allowed to self-promote their products or services.
- To ensure that NARPM drives the topic: On the event surveys, ask for topics they would like to have covered at the events.
- Take the topics from those surveys and then ask members if there was still an interest in this topic. Would have to share more topics than sessions that are available. IE there are 14 topics will need to send out 30 topics.
- Networking has always been an integral part of what makes NARPM the organization what it is. The committee should create dedicated, organized, opportunities for members to network.

#### Locations & Site events

- Don't worry about rotation as the most important variable.
- Continue to seek out the most cost-effective properties at desirable locations for events.
- Make the events fun~ Look at having fun ticketed events that are affordable or are affiliate sponsored.
- The hotel choice is important, and the quality of the hotel should match the level of the attendees. For the convention a large hotel at an affordable rate shall be sought.

#### G. Date and Timing

In order to keep the overall cost of attending to a minimum, it is suggested that the length of the Events be kept to three (3) days (excluding existing contracts). When desired, optional "events" can be held in the day(s) just prior to or just after the main Event at an additional cost to those participating.

#### H. Registration Fees

The Board of Directors on an annual basis shall set registration fees for the National Convention through the budgeting process. Published fees shall include, but not be limited to, member, nonmember, support staff, early bird discount, team discount, and join and register categories.

The current National President and the current Convention Chair are not required to pay registration fees or special convention event and meal fees during the National Convention and Trade Show. President will receive a two (2) bedroom suite and the Convention Chair will receive a room which are comped.

- Every three (3) years a task force should be appointed to ensure the event remains a premier event only for company owners, brokers, and major decision makers that is relevant for the property management industry.

The NARPM CEO has final say on all decisions.

This policy can only be amended with 2/3 approval by the Board of Directors.

## **Appendix 22 NARPM Advocacy Fund**

### NARPM Advocacy Fund Policy

#### Governance

The NARPM Pac Trustees will be responsible for fundraising and for educating NARPM members about NAF.

#### Financial Process

##### Financial Process

While the NAF is a non-reverting fund, annual budgets shall be developed and administered in the same fashion as the NARPM general fund budget, except that any unitemized chapter grant of less than \$2,500 shall require approval of the NAF Subcommittee, any unitemized chapter grant between \$2,500 and **up to** \$5,000 shall require approval by the NARPM Governmental Affairs Committee, and any unitemized chapter grant in excess of \$5,000 shall require additional approval by the NARPM Finance Committee and then the NARPM Board of Directors.

#### Uses of the NAF

Resources from the NAF may be used for the following:

- Administrative costs of the NARPM PAC – This includes, but is not limited to, items like postage, printing PAC collateral, sweepstakes gifts, or any other expenditure that is not a contribution to a candidate.
- Chapter Grants – Chapter grants would be subject to the following provisions:
  - Grants must be used for an acceptable advocacy expense, subject to the approval of the NAF Subcommittee.
  - Examples of expenditures include but are not limited to:
    - Capitol Summits or Day on the Hill events
    - Direct Mail
    - Survey
    - Calls to Action
    - Receptions and promotions of candidates or issues
  - Gift cards for auctions to raise funds for NAF Grants will only be considered upon an application signed by the Chapter President.
  - NAF grant funds shall not be used to contribute to a candidate.
  - Unless specifically waived by the NAF Subcommittee, the chapter must match the grant.
  - After expending the grant funds, the chapter must provide documentation of the expenditure of the grant funds and matching funds for the approved purpose.
- NARPM Capitol Summit Expenses – This would be an emergency backfill to ensure that the event makes budget.
- Local and state chapter legislative days on the hill or Capitol Summits.
- Federal advocacy campaigns and expenses – This would be for large, approved issue-based campaigns for items like collateral and media, and it would also be for unbudgeted, incidental, or other expenses that may arise during the year.
- External memberships, dues, and subscriptions – These funds can be used when opportunities present themselves for the advocacy team to be a part of beneficial groups or access useful items via subscription.
- Any other legal purpose approved by the Finance committee and then the NARPM Board of Directors.

## **Appendix 23 Artificial Intelligence Usage Policy**

### **Purpose**

This Artificial Intelligence Usage Policy outlines the expectations and guidelines for the responsible and ethical use of artificial intelligence (“AI”) by individuals or entities that are members, contributors, contractors, and others who deal in any way with content, data, and information of, or for, the National Association of Residential Property Managers (“NARPM”). NARPM recognizes the rising availability and usage of AI tools across industries and remains committed to responsibly adopting innovative technologies. The purpose of this policy is to ensure that AI is employed throughout NARPM’s endeavors in a manner that aligns with NARPM’s values, professional ethics, and with evolving legal standards. This policy addresses the use of any AI technology and relevant risks associated with its use, including but not limited to liability for intellectual property infringement; false or misleading and biased or discriminatory content; confidential and proprietary information (including NARPM’s information and third-party information); and to ensure compliance with developing laws, regulations, and ethical rules governing the use of AI technologies. NARPM recognizes the evolving legal environment surrounding AI technology and anticipates this policy will evolve. Users should regularly review and revisit this policy to stay abreast of changing policies.

### **Identification of “Artificial Intelligence” or “AI” Tools**

With the advent of tools like ChatGPT, AI has become increasingly prevalent as a productivity tool. However, AI encompasses more than generative tools, and is not always easy to identify. “Artificial intelligence” or “AI” includes any software tool that employs machine learning technology, including but not limited to deep learning and generative AI tools. Because generative AI *generates* content in ways that mimic human creative expression, those tools can be easier to identify than software employing AI technology behind the scenes. If one is unsure whether a software tool or website employs AI technology, and falls within the scope of this policy, please contact NARPM to inquire further.

### **NARPM’s Rules and Policies Applicable to AI**

- 1. Transparency and Accountability.** All individuals and entities to which this policy applies must be transparent and accountable about the use of AI technology in their work. Those that wish to use AI technology should discuss the parameters of their use with NARPM. NARPM may verbally approve, deny, or modify those parameters to best meet the organization’s policy, legal requirements, or other business needs. Users of AI may not install AI assisted plug-ins or use software tools in any devices or equipment of NARPM that have not been pre-approved by NARPM. Users of AI may submit requests to use AI technology for review, guidance, and approval by NARPM. All should strive for transparency by clearly communicating how AI systems are utilized and the impact they may have.
- 2. Confidentiality and Data Privacy.** Those to whom this policy applies must not expose NARPM’s confidential or proprietary information and data to AI. Users of AI should prevent the unauthorized access, disclosure, or destruction of data and must respect privacy laws and adhere to applicable data protection laws to ensure that any personal or sensitive information used in AI technologies is handled with the utmost care and compliance. AI technologies can collect, store, and use inputted information and disclose this information to other third parties. This creates a risk not only of the disclosure of data in violation of U.S. or international law, but also of cybersecurity risks such as potential spam, phishing scams, and deep fakes. Users of AI should remain alert and vigilant of potential cybersecurity threats and attacks as AI generated content is everywhere creating a need to increase fact-checking procedures. Specifically, users of AI should never share the following:
  - Personally identifiable information;
  - NARPM’s intellectual property or proprietary information (including trade secrets, copyrights, patents, trademarks, logos, and related materials), and confidential information and materials;
  - Credentials or sensitive security and system access information; or
  - Disclosure in violation of U.S. or international data privacy laws.

Users of AI should raise concerns or questions related to privacy or data issues with the NARPM.

- 3. Legal Compliance and Ethical Obligations.** Those to whom this policy applies must comply with all relevant laws and regulations pertaining to AI usage including, but not limited to, intellectual property, data protection, and anti-discrimination laws. Specifically, users of AI must:
- Use AI technologies in accordance with all NARPM's conduct, ethics, computer use, and anti-discrimination policies;
  - Fact-check and screen any content generated or provided by AI technologies for accuracy before relying on it for work purposes, and if information cannot be independently verified, refrain from using it for NARPM's purposes;
  - Ensure that third-party contractors creating content for use by NARPM confirm in writing whether their content is AI generated;
  - Screen AI-generated content for biases and discriminatory content; and
  - Verify that NARPM has a legal right to use any inputs to or outputs from AI technology to avoid liability for intellectual property infringement.

NARPM expressly and unequivocally prohibits all use of AI in any manner that infringes or otherwise violates the intellectual property rights of third parties. Users of AI should also consider the ethical implications of their work and ensure that AI systems are designed and deployed in a manner that upholds fairness. Please direct questions about legal and ethical implications of AI usage to NARPM.

- 4. Appropriate Uses of AI Tools.** Due to its inherent limitations, AI technology must be used appropriately. For example, use of AI technology may create liability for its users or for NARPM (i.e., if it is used to produce NARPM content that infringes copyright or trademark rights). AI technology may also be inappropriate for use in situations where an organization seeks to own intellectual property rights in its content (i.e., because U.S. intellectual property laws treat generative AI outputs differently from human-generated content). Accordingly, NARPM prohibits use of AI tools unless expressly permitted by this policy.

The following are examples of appropriate uses for AI:

- Research (e.g., through Google or other online searchable resource that employs AI technology) so long as such research does not involve inputting confidential information in the query or search prompt;
  - If pre-approved for a specific project, use of generative AI tools to generate first drafts of content for marketing, blogs, webinars, social media, or other written content such as correspondence, educational materials, presentations, test questions, summaries, note-taking or outlines; or
  - To automate data analysis and repetitive tasks, including but not limited to formulas for Excel spreadsheets or similar programs.
- 5. Prohibited Uses.** Although the unauthorized use of AI technology is generally prohibited by this policy unless expressly permitted, for the avoidance of doubt, AI technology should never be used under the following circumstances:
- Use of unedited text created by an AI technology in final work product;
  - To upload confidential or proprietary information (for example, the use of AI to record notes during NARPM meetings);
  - To upload sensitive and personal information protected by data privacy laws;
  - To upload NARPM's intellectual property or third party intellectual property;
  - To create content that NARPM intends to assert intellectual property protection or other proprietary interest;
  - To generate content that infringes on the intellectual property or rights of publicity of others, or which uses prompts, requests or keywords intended to invoke (or which may reasonably invoke) protected content, or content that is substantially similar to, in the style of, or a direct copy of protected content (e.g., copyrighted characters, image, likenesses, etc.); and
  - To obtain confidential, proprietary, or intellectual property protected information and materials.

- 6. Development of In-House Generative AI Technology.** The law surrounding infringement liability for the use of AI generated content is still evolving as courts across the U.S. determine whether the unauthorized use of third-party content to train AI models and platforms gives rise to copyright infringement. For this reason, any collection or use of data for purposes of developing generative AI technology should be cleared by NARPM as in accordance with federal and state law as well as NARPM's terms of service use.
  
- 7. Approval and Acknowledgment.** In using AI within the scope of their work or association with NARPM, users of AI acknowledge their understanding of, and commitment to, comply with this AI Usage Policy. Any breach or violation of this policy may lead to disciplinary action with potential consequences up to and including termination of association with NARPM.

Adopted by the Board of Directors February 2024



**APPENDIX 24 NARPM Bylaws**

**BYLAWS can be found at <https://www.narpm.org/about/>**

## **Appendix 25 Events/Program Crowd Release Language**

When management team staff, volunteers or contractors take photographs or record activity at events or programs it is often not possible to get everyone captured in the photographs or recordings to sign a release allowing their use in communications or publications.

Therefore, the Crowd Release Language bolded below will be present on registration webpages alerting prospective attendees before they register for an event or program that they may be photographed or recorded at an event or program.

**By checking this box you confirm you are registering for this NARPM® event or program and you consent to being photographed, filmed and/or otherwise recorded at the event or program. By doing so, you grant to NARPM rights to the release, publication or reproduction of any recorded media taken at the event or program of your appearance, voice or name for use by NARPM and its management team.**

*For any printed event or program registration material, or for registration software that does not allow a check box, the following Crowd Release Language should be used:*

### **Disclaimer**

**By registering for this NARPM® event or program you consent to being photographed, filmed and/or otherwise recorded at the event or program. By doing so, you grant to NARPM rights to the release, publication or reproduction of any recorded media taken at the event or program of your appearance, voice or name for use by NARPM and its management team.**

## **Appendix 26 Author, Presenter and/or Creator Warranty and Agreement**

The undersigned represents and warrants to The National Association of Residential Property Managers (“Association”) and its management team that this work is the undersigned’s own original work; that the undersigned is the sole owner of this work and all of the rights herein granted; that the undersigned has the full right and power to make this release and license; that this work does not violate any copyright, proprietary, intellectual property or personal rights of others; that this work is factually accurate and contains no matter defamatory or otherwise unlawful; that the undersigned has not previously in any manner disposed of by sale or assignment any of the rights herein granted to the Association and its management team nor previously granted any rights adverse thereto or inconsistent therewith; and that there are no rights outstanding which would diminish, encumber or impair the full enjoyment or exercise of the rights herein granted to the Association and its management team to use the work in any matter it deems appropriate.

The undersigned agrees to indemnify and hold harmless the Association and its officers, directors, members, employees, agents, management team and volunteers from and against any and all claims, actions, losses, demands, costs, including reasonable attorneys’ fees, and all other expenses relating or incidental to, or arising directly or indirectly from, the inaccuracy or breach of any of the aforementioned warranties and representations.

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**Printed Name**

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**Signature**

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**Date**