

Bob Preston

From: CALNARPM <info@narpmcalifornia.org>
Sent: Wednesday, August 12, 2020 10:28 AM
To: Bob Preston
Subject: NARPM California August 2020 Newsletter



August 2020 Newsletter



NARPM California State Chapter 2020-2021 Leadership Team and Board

NARPM California State Chapter is pleased to announce its new leadership team and board for 2020-2021! We are all looking forward to a great year for NARPM California State Chapter!

Bob Preston,
President and Acting Conference
Chair
www.ncpropertytygroup.com

Donna Gary,
Secretary
www.ppmmdavis.com

Ally Kubarych,

Mark Scott,
Past President

www.encorerealtysd.com

Bob Davie,
Treasurer

www.sandiegoprpm.com

Communications Chair

www.ncpropertygrtoup.com

Anne Lackey,
Affiliates Director

www.hiresmartvirtualemployees.com



Bob Preston, President



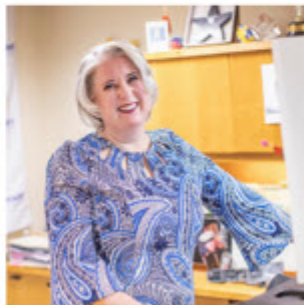
Mark Scott, Past President



Bob Davie, Treasurer



Donna Gary, Secretary



Anne Lackey,
Affiliates Director



Ally Kubarych,
Communications Chair

Call for Nominations for NARPM California State Chapter Board!

NARPM California State Chapter still has openings on our board! We are seeking nominations and candidates for the 2020-2021 term to serve in the following volunteer capacities:

- Conference Committee Chair
- Education/Speaker Committee Chair
- President Elect for the forthcoming term

This is a fantastic opportunity to get involved with NARPM at the California State level. For those working toward your RMP or MPM designation, this is also a great way to earn valuable points. If you are interested in one of these positions or would like to be nominated for candidacy, please email a copy of your bio, head shot, and a brief description of why you want to be involved in NARPM California State Chapter to: info@narpmcalifornia.org.



2021 NARPM California State Chapter Conference and Tradeshow

We are in the planning stage for our 2021 California State Chapter Conference and Tradeshow, scheduled for March 31 – April 2, 2021 (education classes will be held on March 30). While we are hoping for this to be a live event in Napa Valley, CA, we are monitoring the health and safety of doing so and will consider a virtual conference as an alternative. Stay tuned for more information as the plans for the conference evolve. For more information visit our conference website <https://narpmcalifornia.org/conference> or contact us at conference@narpmcalifornia.org.



UPCOMING LOCAL CHAPTER EVENTS



NARPM Long Beach / Orange County

Legal update and Pending Legislation

Aug 20, 2020

[GET MORE INFORMATION](#)



NARPM San Diego

Zillow Back Office Tools and More!

Aug 20, 2020

[GET MORE INFORMATION](#)



NARPM Santa Clara

How to Embezzle from a Property Manager

Aug 20, 2020

[GET MORE INFORMATION](#)



NARPM Monterey Bay

Monthly Membership Meeting with Melissa Prandi

Aug 20, 2020

[GET MORE INFORMATION](#)

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Bob Preston

From: CALNARPM <info@narpmcalifornia.org>
Sent: Monday, September 14, 2020 1:00 PM
To: Bob Preston
Subject: NARPM California Sept 2020 Newsletter



September 2020 Newsletter

Thank you to our California Chapter of NARPM Sponsors



Adrian Harrell Joins CALNARPM Board as President Elect and
Speaker/Education Committee Chair



ADRIAN HARRELL

President Elect

We are pleased to welcome Adrian Harrell to the CALNARPM Board! Adrian is President, CEO and Principal Property Manager at New Bridge Management, which manages the real estate portfolios of investors. Harrell has held leadership roles at numerous local community and national organizations such as the Modesto Sister Cities International organization, Central Valley Professional Exchange, Central Valley Association of Realtors and National Association of Residential Property Managers.

Join us on a CALNARPM Committee!

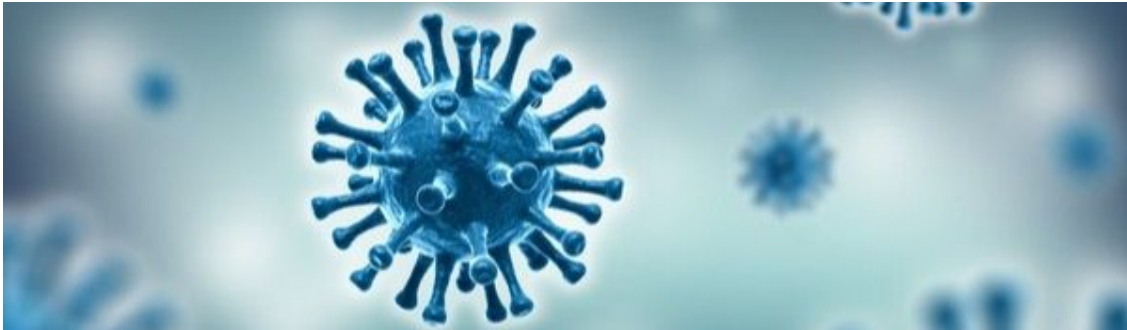


Would you be interested in joining one of our CALNARPM committees? We have three current committees and would love to have new committee members join and participate! Openings exist on the following CALNARPM committees:

- a. CALNARPM State Conference and Tradeshow Committee
- b. Education/Speaker Committee
- c. Communications Committee

This is a fantastic opportunity to get involved with NARPM at the California State level. For those working toward your RMP or MPM designation, this is also a great way to earn 5 valuable elective points. If you are interested, please email: info@narpmcalifornia.org.

COVID-19 Tenant Relief Act



All of you should be aware that the CA State Legislator and Governor Newsom have taken action by signing the COVID-19 Tenant Relief Act (AB 3088) into law on August 31, 2020. In case you've missed it, the COVID-19 Tenant Relief Act of 2020 ("CTRA") continues protection for residential tenants with a financial hardship related to COVID-19 from being evicted until 2021 under certain circumstances. Explaining the details of the new law are beyond the scope of this newsletter but here are some useful links to further information on the topic:

[Information and resources regarding the Tenant Relief Act \(CAANET.org\)](#)

[California Legislative AB-3088 Tenancy: rental payment default: mortgage forbearance: state of emergency: COVID-19](#)

California Ballot Initiatives of Interest!

There are four California Ballot Measures in the upcoming election on November 3rd that CALNARPM believes are significant to Property Managers. We are planning a non-partisan educational webinar for October 2020 (date/time TBD) for a discussion of these California Ballot Measures in advance of the election. Stay tuned for more details of this upcoming event!

In the meantime, here is a summary of the ballot measures of particular interest.

California Proposition 15: Tax on Commercial and Industrial Properties for Education and Local Government Funding Initiative ("Split Roll Measure")

Significance to Property Managers: With the changes proposed to taxation of commercial real estate and residential rent control on the 2020 ballot, the real estate landscape may be changing in California.

A "yes" vote supports this constitutional amendment to require commercial and industrial properties, except those zoned as commercial agriculture, to be taxed based on their market value, rather than their purchase price.

A "no" vote opposes this constitutional amendment, thus continuing to tax commercial and industrial properties based on a property's purchase price, with annual increases equal to the rate of inflation or 2 percent, whichever is lower.

California Proposition 19: Property Tax Transfers, Exemptions, and Revenue for Wildfire Agencies and Counties Amendment

Significance to Property Managers: Allows homeowners who are over 55, disabled or victims of natural disaster to take a portion of their property tax base with them when they sell their home and buy a new one but requires reassessment of inherited homes that are not used as principal residences, such as rentals.

A "yes" vote supports this constitutional amendment to: allow eligible homeowners to transfer their tax assessments anywhere within the state and allow tax assessments to be transferred to a more expensive home with an upward adjustment; increase the number of times that persons can transfer their tax assessments from one to three; require that inherited homes that are not used as principal residences, such as second homes or rentals, be reassessed at market value when transferred; and allocate additional revenue or net savings resulting from the ballot measure to wildfire agencies and counties.

A "no" vote opposes this constitutional amendment, therefore continuing to: allow eligible homeowners to transfer their tax assessments within counties and to homes of equal or lesser market value; keep the number of times that persons can transfer their tax assessments at one; allow the tax assessments on inherited homes, including those not used as principal residences, to be transferred from parent to child or grandparent to grandchild.

California Proposition 21: Local Rent Control Initiative

Significance to Property Managers: Proposition 21 could allow for permanent price caps on all forms of housing.

A "yes" vote supports this ballot initiative to allow local governments to enact rent control on housing that was first occupied over 15 years ago, with an exception for landlords who own no more than two homes with distinct titles or subdivided interests.

A "no" vote opposes this ballot initiative, thereby continuing to prohibit rent control on housing that was first occupied after February 1, 1995, and housing units with distinct titles, such as single-family homes.

California Proposition 22: App-Based Drivers as Contractors and Labor Policies Initiative

Significance to Property Managers: The ballot measure would not affect how AB 5 is applied to other types of workers. As property managers and real estate agents, however, it does bring more visibility to how employees / contractors are classified in our industry, something we should all know and understand.

A "yes" vote supports this ballot initiative to define app-based transportation (rideshare) and delivery drivers as independent contractors and adopt labor and wage policies specific to app-based drivers and companies.

A "no" vote opposes this ballot initiative, meaning California Assembly Bill 5 (2019) could be used to decide whether app-based drivers are employees or independent contractors.

2021 NARPM California State Chapter Conference and Tradeshow
UPDATE!



We have made the decision to hold our 2021 California State Chapter Conference and Tradeshow, as a virtual conference, dates TBD.

We pledge to you all that it will be an exciting, innovative, and compelling event at an attractive registration cost. Stay tuned for more information as the plans for the conference evolve.

For sponsors and affiliates, the conference will be an energy-packed event that gives you the opportunity to be in front of hundreds of property managers. For more information or to become a sponsor, visit our conference website narpmcalifornia.org/conference or contact us at conference@narpmcalifornia.org.

More Details Coming Soon!

UPCOMING LOCAL CHAPTER EVENTS



NARPM Sacramento

2020 Vendor Fair – MFC

Tuesday, September 15, 2020

[GET MORE INFORMATION](#)



NARPM Sacramento

Real Estate Safety Tips with Chief Daniel Hahn

Tuesday, September 15, 2020

[GET MORE INFORMATION](#)



NARPM San Diego

Franchise Tax Board

Wednesday, September 16, 2020

[GET MORE INFORMATION](#)



NARPM Long Beach / Orange County

Maximizing Your Property Management Company's
Revenue Per Unit

Thursday, September 17, 2020

[GET MORE INFORMATION](#)



NARPM Santa Clara

Guest Speaker Kellie Tollifson

Thursday, September 17, 2020

[GET MORE INFORMATION](#)

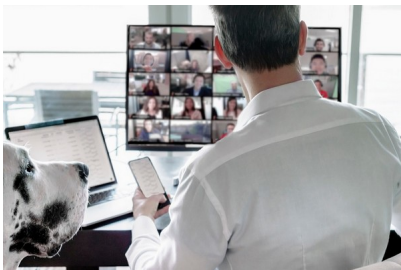


NARPM Alameda-Contra Costa

ZOOM Meeting

Thursday, September 17, 2020

[GET MORE INFORMATION](#)



NARPM Marin/Sonoma

ZOOM Meeting

Thursday, September 24, 2020

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Bob Preston

From: CALNARPM <info@narpmcalifornia.org>
Sent: Thursday, October 8, 2020 11:26 AM
To: Bob Preston
Subject: NARPM California Oct 2020 Newsletter



October 2020 Newsletter

Thank you to our California Chapter of NARPM Sponsors



New Dates for the 2021 California State Chapter
Virtual Conference and Tradeshow!



MARCH 11-12, 2021

NARPM Members

\$99 before February 1, 2021

\$149 after February 1, 2021

Non-Members

\$149 before February 1, 2021

\$199 after February 1, 2021

[Click here to register!](#)

This promises to be an exciting, innovative, and compelling event. **Only \$99 for NARPM members so register now!**

Stay tuned for more information as the plans for the conference evolve.

For sponsors and affiliates, the conference will be an energy-packed event that gives you the opportunity to be in front of hundreds of property managers. For more information or to become a sponsor, visit our conference

website narpmcalifornia.org/conference or contact us
at conference@narpmcalifornia.org.

**What to Know to Make Your Endorsement to Your Property
Owners!**



Join the California State Chapter of NARPM for a presentation of arguments for and against measures 15, 19, 21 & 22 on the November Election ballots that will impact the real estate industry.

Wednesday, October 14, 2020

9:00 AM- 12:00 PM

Virtual Zoom Presentation

Get More Information & Register

Pre-registration is required. Instructions with the Zoom link and how to join the meeting will be sent by email.

Questions? Contact Adrian Harrell

adrian@newbridgemanagement.com

Get involved! Committee Positions Still Available

We are pleased to welcome two new committee members to the CALNARPM Committee team!

Mike Connolly from [East Bay Property Management Company](#) will be serving as a member of the Convention Committee and Mike Dunfee from [Mike Dunfee Group](#) serving as a member of the Education/Speaker Committee.



Mike Connolly



Mike Dunfee

There is still room to join one of our three committees! Openings exist on the following CALNARPM committees:

- a. CALNARPM State Conference and Tradeshow Committee
- b. Education/Speaker Committee
- c. Communications Committee

This is a fantastic opportunity to get involved with NARPM at the California State level. For those working toward your RMP or MPM designation, this is

also a great way to earn 5 valuable elective points. If you are interested, please email: info@narpmcalifornia.org.

UPCOMING LOCAL CHAPTER EVENTS



NARPM Sacramento

AB 3088 (THE COVID-19 TENANT RELIEF ACT)

WITH KIMBALL, TIREY AND ST JOHN

[GET MORE INFORMATION](#)



NARPM Long Beach / Orange County

Nitty Gritty of CA FTB Withholding and IRS

Withholding on Foreign Held Rent Properties

[GET MORE INFORMATION](#)

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Bob Preston

From: CALNARPM <narpmcalifornia@gmail.com>
Sent: Thursday, October 1, 2020 2:34 PM
To: Bob Preston
Subject: California Property Managers - What to Know to Make Your Endorsement to Your Property Owners!



National Association of Residential Property Managers
CALIFORNIA STATE CHAPTER



California Property Managers - What to Know to Make Your Endorsement to Your Property Owners!

When
Wednesday, October 14, 2020

Join the California State Chapter of NARPM for a presentation of arguments for and against measures 15, 19, 21 & 22 on the November Election ballots

from 9:00 AM to 12:00 PM PDT
[Add to Calendar](#)

Where
This is an online event.

that will impact the real estate industry.

Schedule of Events



[Visit Our Website](#)

California Proposition 15: Tax on Commercial and Industrial Properties for Education and Local Government Funding Initiative

9:05 - 9:20 Support

California Tax Reform Association - Lenny Goldberg

9:20 - 9:35 Opposition

California Business Properties Association - Rex Hime

9:35 - 9:45 Q&A

California Proposition 19: Property Tax Transfers, Exemptions, and Revenue for Wildfire Agencies and Counties Amendment

9:50 - 10:05 Support

California Association of Realtors - David Wolfe

10:05 - 10:20 Opposition

Howard Jarvis Taxpayers Association - Susan Shelley

10:20 - 10:30 Q&A

California Proposition 21: Local Rent Control Initiative

10:35 - 10:50 Support

Eviction Defense Network - Elena Popp

10:50 - 11:05 Opposition

California Apartment Association - Debra Carlton

11:05 - 11:15 Q&A

California Proposition 22: App-Based Drivers as Contractors and Labor Policies Initiative

11:20 - 11:35 Support

J. Canete - California Hispanic Chamber of Commerce

11:35 - 11:50 Opposition

California Labor Federation - Speaker TBD

11:50 - 12:00 Q&A

WHEN

Wednesday, October 14, 2020

9:00am - 12:00pm

WHERE

Virtual Zoom Presentation

COST

Free

Please pre-register. You will receive a confirmation email with the Zoom link and how to join the meeting.

CONTACT

Adrian Harrell

adrian@newbridgemanagement.com

[Register Now!](#)

[I can't make it](#)

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Bob Preston

From: CALNARPM <info@narpmcalifornia.org>
Sent: Thursday, November 5, 2020 2:00 PM
To: Bob Preston
Subject: NARPM California Nov 2020 Newsletter



November 2020 Newsletter

Thank you to our California Chapter of NARPM 2021 Sponsors



2021 VIRTUAL CONFERENCE REGISTRATION NOW OPEN!



MARCH 11-12, 2021

Registration now open! Only \$99 for NARPM Members

[Reserve Your Ticket](#)

For sponsors and affiliates, the conference will be an energy-packed event that gives you the opportunity to be in front of hundreds of property managers. For more information or to become a sponsor, visit our conference website or contact us at conference@narpmcalifornia.org.

[Sponsor Registration](#)

CALL FOR VIRTUAL PRESENTATIONS

Submit your proposal today!

Deadline: November 15, 2020



You are being invited to submit your proposal to speak at the CALNARPM Annual Convention, scheduled March 11-12, 2021. This exciting, innovative, and compelling event will draw 100s of property managers from within the State of California and beyond to learn about trends, changes, and new ideas in the property management industry.

Selected conference presenters earn 10 NARPM designation points!

[Visit our website for more information!](#)

[Click here to download proposal form](#)

SPONSOR HIGHLIGHT



What if you could earn \$100+ per home in annual profit with just a 30-minute call?

Second Nature helps maximize the value you already provide with a Resident Benefits Package. We have experts on staff to help you build an RBP specific to your needs.

Second Nature will:

- Identify the true cost of services you're already providing and suggest other services that add value to your business and your residents.
- Cover best practices for accounting, admin, and team training.

- Reveal three different enrollment points that eliminate resident pushback.
- Provide the tools and assets you need for a seamless RPB rollout.
- Reach out to your trusted partners at Second Nature for assistance creating your specific Resident Benefits Package.

Get started with Second Nature today! try.secondnature.com/cal2021

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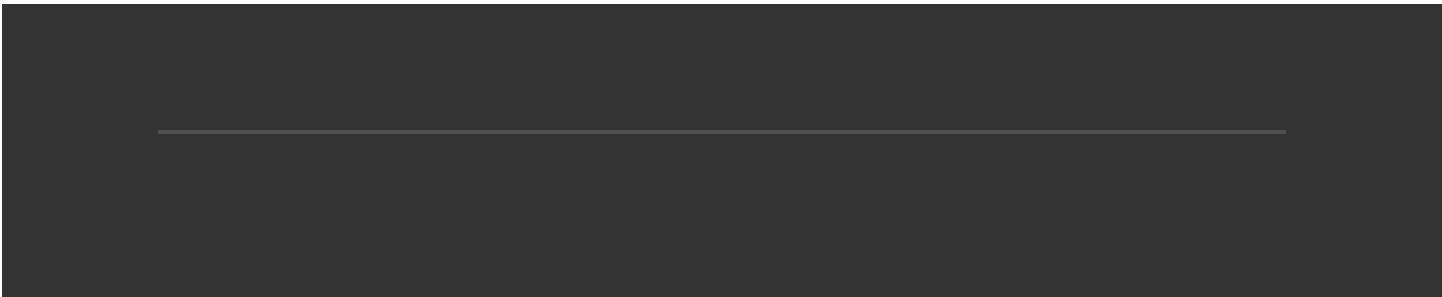
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Minutes

2019-2020 Board Meeting & Conference Committee

Monday, August 26th, 2019

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

a. Present: Mark, Michael, Bob, Anne Lackey and Efren

b. Absent: Dana, Donna, and Cheryl

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 1: RESPONSIBILITY TO PROTECT THE PUBLIC

The Property Manager shall protect the public against fraud, misrepresentation, and unethical practices in property management.

STANDARDS OF PROFESSIONALISM

- **1-1** The Property Manager shall endeavor to eliminate, through the normal course of business, any practices which could be damaging to the public or bring discredit to the profession.
- **1-2** The Property Manager shall cooperate with the governmental agency charged with regulating the practices of Property Managers.
- **1-3** The Property Manager shall comply with all relevant local and state ordinances regarding real estate law, licensing, insurance, and banking.
- **1-4** The Property Manager shall comply with all federal and state antitrust laws and shall follow the NARPM® Antitrust Policy and any related procedures.
- **1-5** The Property Manager shall not reveal confidential information of Clients, Tenants or others except as required in the course of performing his or her duties or as otherwise required by law. The Property Manager shall take all reasonable precautions to protect confidential information.
- **1-6** The Property Manager shall use reasonable efforts to ensure that information on his or her website, or that of his or her Firm, is current and accurate. If it becomes apparent that information on the website is not current or accurate, then the Property Manager shall promptly take corrective action.
- **1-7** Websites of the Property Manager shall not contain any deceptive metatags or other devices/methods to direct, drive, or divert Internet traffic in a deceptive manner or to otherwise mislead users. The websites shall also not manipulate listing content in any deceptive or misleading way.



2019-2020 CALNARPM Board of Directors

Mark W. Scott, President

Michael Braddon, Past President

Cheryl Chase-Berkson, 2016-2017 Honorary Past President

Donna Gary, Secretary

Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

- **1-8** The Property Manager shall disclose all details on the availability of rental properties to prospective parties on a regular and timely basis.
- **1-9** The Property Manager shall not exaggerate, misrepresent, misinform, or conceal pertinent facts in the advertising, leasing, and management of property.
- **1-10** The Property Manager shall make reasonable attempts to remove from the Internet listings for rentals that are no longer available.

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the June 26th, 2019 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

IV. Treasurer's Report – Bob Davie

A. NOTE: New P.O. Box for CALNARPM June 2018

- CALNARPM, PO Box 27831, San Diego, CA 92198-1831

B. Bob Davie (Proforma) reported ~\$64K balance 2019; ~\$42K on hand

- \$22K New funds from 2020 Exhibitors

V. 2019-2020 Board – Mark W. Scott - President

A. BOD slate of candidates sent out July 17, 2019 from email VOTE;
APPROVED

- Mark W. Scott, President **(NEW)**
- Michael Braddon, Past President & Education Director
- Cheryl-Honorary Past President
- Bob Davie, Treasurer
- Donna Gary, Secretary & Conference Chair 2020
- New Affiliate Chair 2020: Anne Lackey

B. CALNARPM 2019-2020 Search for President-Elect STARTED

C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)

- Must have contributed to CALNARPM (Volunteering)
- Held Exhibitor Gold/Silver Status 3 out of 5 Years
- Good Standing with NARPM
- NOTE: We reserve the right to choose who is our Corporate Sponsors.



2019-2020 CALNARPM Board of Directors

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Efren Espinoza, Membership/Communications Co-Director

VI. CALNARPM 2020 Conference Committee – Mark W. Scott

- A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!**
- B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu**
- C. Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!**
- D. Exhibitors**
 - **10 Gold (8) sold; 14 Silver (0) sold; 10 Bronze (2) sold**
 - **(3) Partners: Yardi, Seacoast Bank & APM Help; PAID IN FULL**
- E. Vendor Postcard mailing 8/20**
- F. IDEA of a COORDINATOR (Proposed)**
 - NOT \$20k per year (Sterling) but an Overall Guiding Coordinator
 - Utilize existing relationship with Laurie @ Elite Venue
 - NOTE: Too much to handle for a Volunteer Board
- G. Recommend LIVE MUSIC Next Years !! (Michael)**
- H. Renewed Revised Contract with Laurie @ Elite Venue !!!**
 - **\$350/M emails / \$275/M Website**
- I. THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!**
- J. WORKSHOPS:**
 - **DRE Speaker**
 - **KTS (3+)**
 - **... more coming.**

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Mark W. Scott No updates.

XI. New Business – Mark W. Scott No updates.



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Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

XII. Future Meeting Dates – BOD & Conference Committee

a. Wednesday, Sept 18th, 2019 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM



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B. Absent: Efren, Cheryl and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 2: DISCRIMINATION

The Property Manager shall not discriminate in the management, rental, lease, or negotiation for real property, shall operate consistent with fair housing laws and regulations and shall comply with all federal, state, and local laws concerning discrimination.

STANDARDS OF PROFESSIONALISM

- **2-1** It is the duty of the Property Manager to educate those with whom the Property Manager is affiliated to comply with all fair housing laws and laws regarding discrimination.

2-2 The Property Manager shall not deny service to any person due to race, color, religion, sex, handicap, familial status, national origin, sexual orientation, or gender identity.

Secretary's Report – Mark W. Scott - President

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III. Treasurer's Report – Bob Davie

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- I. **WORKSHOPS:**
 - **DRE Speaker**
 - **KTS (3+)**
 - **Scott Brady**
 - **Rent / Vacancy Control**
 - **Section 8 Statewide/City of San Diego**
 - **... more coming.**
- J. **SPEAKERS: ????**

VI. Communication – Efren Espinoza No updates.

VII. Legislative – Dana Wares No updates.

VIII. Membership – Efren Espinoza No updates.

IX. Old Business – Mark W. Scott No updates.

K. IDEA of a COORDINATOR (Proposed)

- **NOT \$20k per year (Sterling) but an Overall Guiding Coordinator**
- **Utilize existing relationship with Laurie @ Elite Venue**
- **NOTE: Too much to handle for a Volunteer Board**



2019-2020 CALNARPM Board of Directors

Mark W. Scott, President

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Cheryl Chase-Berkson, 2016-2017 Honorary Past President

Donna Gary, Secretary

Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

X. New Business – Mark W. Scott **No updates.**

XI. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, October 30th, 2019 @ 9:30 AM

XII. Adjournment – Mark W. Scott **Adjourned 10:30 AM**



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, October 30th, 2019

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Cheryl, Bob, Donna and Anne Lackey

B. Absent: Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 3: RESPONSIBILITY TO CLIENT

When working in a disclosed relationship with a client, the Property Manager shall protect the client's best interest at all times.

STANDARDS OF PROFESSIONALISM

- **3-1** The Property Manager shall use written agreements, and written extensions, if required, outlining all responsibilities and fees, if any. The Client will be provided a copy of all signed agreements and extensions, and the Property Manager will retain a copy.
- **3-2** The Property Manager shall communicate regularly with the Client, either orally or in writing and shall provide the Client with written reports as needed and as agreed between all parties. In the event of any dispute, the Property Manager shall provide a written accounting as soon as practical.
- **3-3** Should the Property Manager have a disclosed relationship with a property owner, the Property Manager shall review and verify all Tenant applications to determine the applicant's ability to pay rental fees and to assess the likelihood that the applicant will comply with all provisions of the rental agreement.
- **3-4** The Property Manager shall accept no commissions, rebates, profits, discounts, or any other benefit which has not been fully disclosed to and approved by the Client.
- **3-5** The Property Manager shall not mislead a potential Client about the rental market value of a property in an attempt to secure a rental listing.
- **3-6** The Property Manager shall disclose to his or her Client all pertinent facts relating to any transaction.



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Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the September 18th, 2019 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

IV. Treasurer's Report – Bob Davie

A. NOTE: New P.O. Box for CALNARPM June 2018

- CALNARPM, PO Box 27831, San Diego, CA 92198-1831

B. Bob Davie (Proforma) reported ~\$67K balance 2019; ~\$42K on hand

- +\$4K New funds from 2020 Exhibitors – PayPal Account

V. 2019-2020 Board –Mark W. Scott - President

A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED

- Mark W. Scott, President (NEW)
- Michael Braddon, Past President & Education Director
- Cheryl-Honorary Past President
- Bob Davie, Treasurer
- Donna Gary, Secretary & Conference Chair 2020
- New Affiliate Chair 2020: Anne Lackey

B. CALNARPM 2019-2020 Search for President-Elect STARTED

C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)

- Must have contributed to CALNARPM (Volunteering)
- Held Exhibitor Gold/Silver Status 3 out of 5 Years
- Good Standing with NARPM
- NOTE: We reserve the right to choose who is our Corporate Sponsors.



2019-2020 CALNARPM Board of Directors

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Anne Lackey, Affiliate Director

Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

VI. CALNARPM 2020 Conference Committee – Mark W. Scott

- A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
- B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu
- C. **Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!**
- D. **Exhibitors**
 - **10 Gold (10) sold out; 14 Silver (0) sold; 10 Bronze (5) sold**
 - **(3) Partners: Yardi, Seacoast Bank & APM Help; PAID IN FULL**
- E. **Update Exhibitor Brochure – Trade Show Hours**
- F. **Anne Lackey – Handout at National NARPM Conference - Exhibitors**
- G. **VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary**
 - **Michael 1st and Mark 2nd**
- H. **Vendor Postcard mailing 8/20**
- I. **Recommend LIVE MUSIC Next Years !! (Michael)**
- J. **Renewed Revised Contract with Laurie @ Elite Venue !!!**
 - **\$350/M emails / \$275/M Website**
- K. **THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!**
- L. **WORKSHOPS:**
 - **DRE Speaker**
 - **KTS (3+)**
 - **Scott Brady**
 - **Rent / Vacancy Control**
 - **Section 8 Statewide/City of San Diego**
 - **... more coming.**
- M. **SPEAKERS: Brian Birdy, Melissa Prandi, Marc Cunningham ???**
- N. **HOTEL VIST (Riviera Hotel): November 2, 2020**

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Mark W. Scott No updates.



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O. IDEA of a COORDINATOR (Proposed)

- NOT \$20k per year (Sterling) but an Overall Guiding Coordinator
- Utilize existing relationship with Laurie @ Elite Venue
- NOTE: Too much to handle for a Volunteer Board

XI. New Business – Mark W. Scott No updates.

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, November 13th, 2019 @ 9:30 AM

XIII. Adjournment – Mark W. Scottf Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, November 13th, 2019

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob, Donna and Anne Lackey

B. Absent: Efren, Cheryl and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 4: OBLIGATIONS TO TENANTS

The Property Manager shall treat all Tenants honestly and professionally when they are applying for, living in, and/or vacating a managed residence, including through the deposit refund process.

STANDARDS OF PROFESSIONALISM

- **4-1** The Property Manager shall offer all prospective Tenants a written application.
- **4-2** The Property Manager shall provide all Tenants with a copy of the signed rental agreement and extensions with all addendums attached.
- **4-3** The Property Manager shall make all disclosures as required by state and local laws and provide the Tenant an opportunity to complete a written condition report within 7 days of moving in.
- **4-4** The Property Manager shall respond promptly to requests for repairs.

4-5 The Property Manager shall provide a written deposit refund determination to the Tenant within the time prescribed by law after the Tenant has vacated a property. The Property Manager shall not cause any undue delay in refunding or accounting for the security deposit.



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Anne Lackey, Affiliate Director

Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the October 30th, 2019 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

IV. Treasurer's Report – Bob Davie

A. NOTE: New P.O. Box for CALNARPM June 2018

- CALNARPM, PO Box 27831, San Diego, CA 92198-1831

B. Bob Davie (Proforma) reported ~\$67K balance 2019; ~\$42K on hand

- +\$4K New funds from 2020 Exhibitors – PayPal Account

V. 2019-2020 Board –Mark W. Scott - President

A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED

- Mark W. Scott, President (NEW)
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- Cheryl-Honorary Past President
- Bob Davie, Treasurer
- Donna Gary, Secretary & Conference Chair 2020
- New Affiliate Chair 2020: Anne Lackey

B. CALNARPM 2019-2020 Search for President-Elect STARTED

C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)

- Must have contributed to CALNARPM (Volunteering)
- Held Exhibitor Gold/Silver Status 3 out of 5 Years
- Good Standing with NARPM
- NOTE: We reserve the right to choose who is our Corporate Sponsors.



VI. CALNARPM 2020 Conference Committee – Mark W. Scott

- A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
- B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu
- C. **Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!**
- D. **Exhibitors**
 - 10 Gold (10) sold out; 14 Silver (5) sold; 10 Bronze (9) sold
 - (3) Partners: Yardi, Seacoast Bank & APM Help; PAID IN FULL
 - (24+3) \$42K paid; \$12K pending (10)
 - Pending ... 3 promised; 6 VM, 5 New Silver
- E. **Update Exhibitor Brochure – Trade Show Hours**
- F. **Anne Lackey – Handout at National NARPM Conference - Exhibitors**
- G. **VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary**
 - Michael 1st and Mark 2nd
- H. **Vendor Postcard mailing 8/20**
- I. **Recommend LIVE MUSIC Next Years !! (Michael)**
- J. **Renewed Revised Contract with Laurie @ Elite Venue !!!**
 - \$350/M emails / \$275/M Website
- K. **THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!**
- L. **WORKSHOPS:**
 - DRE Speaker 2X
 - KTS (3+)
 - Scott Brady
 - Rent / Vacancy Control
 - Section 8 Statewide/City of San Diego
 - (review) 1st Choice Bank Presentation
 - ... more coming.
- M. **SPEAKERS: Brian Birdy, Melissa Prandi YES, Marc Cunningham YES**
 - VOTE: 1st Bob Davie; 2nd Donna Gary; ALL YES
- N. **HOTEL VIST (Riviera Hotel): November 2, 2020 GOOD VISIT**
- O. **NARPM Classes: Melissa Prandi; NARPM Grant??**

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.



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Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

X. Old Business – Mark W. Scott **No updates.**

P. IDEA of a COORDINATOR (Proposed)

- NOT \$20k per year (Sterling) but an Overall Guiding Coordinator
- Utilize existing relationship with Laurie @ Elite Venue
- NOTE: Too much to handle for a Volunteer Board

XI. New Business – Mark W. Scott **No updates.**

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, December 4th, 2019 @ 9:30 AM

XIII. Adjournment – Mark W. Scott **Adjourned 10:30 AM**



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, December (4th) 11th, 2019

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. **Call to Order/Introductions** – *Mark W. Scott – President*

Called to order 9:30 AM

A. Present: Mark, Michael, Efren and Cheryl

B. Absent: Bob, Donna, Anne Lackey and Dana

II. **NARPM® Code of Ethics** – *Mark W. Scott – President*

Article 5: CARE OF MANAGED PROPERTIES

The Property Manager shall hold a high regard for the safety and health of those lawfully at a managed property and shall manage all properties in accordance with safety and habitability requirements of the local jurisdiction.

STANDARDS OF PROFESSIONALISM

- **5-1** The Property Manager shall not manage properties for Clients who refuse, or are unable, to maintain their property in accordance with safety and habitability requirements of the local jurisdiction.

5-2 The Property Manager shall terminate management of a property if the Client does not comply with habitability requirements.

III. **Secretary's Report** – *Mark W. Scott - President*

Vote needed to approve the Minutes of the November 13th, 2019 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

IV. **Treasurer's Report** – Bob Davie

A. NOTE: New P.O. Box for CALNARPM June 2018

- CALNARPM, PO Box 27831, San Diego, CA 92198-1831

B. Bob Davie (Proforma) reported ~\$67K balance 2019; ~\$42K on hand



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V. 2019-2020 Board –Mark W. Scott - President

A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED

- Mark W. Scott, President (NEW)
- Michael Braddon, Past President & Education Director
- Cheryl-Honorary Past President
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- New Affiliate Chair 2020: Anne Lackey

B. CALNARPM 2019-2020 Search for President-Elect STARTED

C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)

- Must have contributed to CALNARPM (Volunteering)
- Held Exhibitor Gold/Silver Status 3 out of 5 Years
- Good Standing with NARPM
- NOTE: We reserve the right to choose who is our Corporate Sponsors.

VI. CALNARPM 2020 Conference Committee – Mark W. Scott

A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!

B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu

C. Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!

D. Exhibitors

- 10 Gold (10) SOLD OUT; 14 Silver (8) sold; 10 Bronze SOLD OUT
- (3) Partners: Yardi, Seacoast Bank & APM Help; PAID
- (28+3) PAID; pending (6)

E. Update Exhibitor Brochure – Trade Show Hours

F. Anne Lackey – Handout at National NARPM Conference - Exhibitors

G. VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary

- Michael 1st and Mark 2nd

H. Vendor Postcard mailing 8/20

I. Recommend LIVE MUSIC Next Years !! (Michael)

J. Renewed Revised Contract with Laurie @ Elite Venue !!!

- \$350/M emails / \$275/M Website

K. THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!

L. WORKSHOPS:

- DRE Speaker 2X
- KTS (3+)
- Scott Brady
- Rent / Vacancy Control
- Section 8 Statewide/City of San Diego
- (review) 1st Choice Bank Presentation



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- ... more coming.

M. **SPEAKERS: Melissa Prandi 3rd, Marc Cunningham 1st**

- **And now Brad Larsen 3rd Speaker (2nd in line up)**

N. **HOTEL VIST (Riviera Hotel): November 2, 2020 GOOD VISIT**

O. **NARPM Classes: Melissa Prandi; NARPM Grant??**

P. **UPDATE Conference Brochure February 2020**

Q. **NOTE: February Conferences are HARDER due to Holidays**

R. **Efren working with Donna on ground game in Palm Springs**

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Mark W. Scott No updates.

S. **IDEA of a COORDINATOR (Proposed)**

- NOT \$20k per year (Sterling) but an Overall Guiding Coordinator
- Utilize existing relationship with Laurie @ Elite Venue
- NOTE: Too much to handle for a Volunteer Board

XI. New Business – Mark W. Scott No updates.

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, January 18th, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, January 18th, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob, Donna, Cheryl and Anne Lackey

B. Absent: Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 6: HANDLING OF FUNDS

The Property Manager shall hold all funds received on behalf of others in compliance with state law and shall not commingle the funds with personal or other business funds or use the funds for other than their intended purposes.

STANDARDS OF PROFESSIONALISM

6-1 The Property Manager shall keep appropriate records and shall prepare and furnish to the Client accurate and timely financial reports relating to the Client's rental and funds in accordance with the terms of the applicable management agreement.

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the December 11th, 2019 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

IV. Treasurer's Report – Bob Davie

A. NOTE: New P.O. Box for CALNARPM June 2018

▪ CALNARPM, PO Box 27831, San Diego, CA 92198-1831

B. Bob Davie (Proforma) reported ~\$67K balance 2019; ~\$42K on hand



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V. 2019-2020 Board –Mark W. Scott - President

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C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)

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- Held Exhibitor Gold/Silver Status 3 out of 5 Years
- Good Standing with NARPM
- NOTE: We reserve the right to choose who is our Corporate Sponsors.

VI. CALNARPM 2020 Conference Committee – Mark W. Scott

A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!

B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu

C. Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!

D. Exhibitors

- 10 Gold SOLD OUT; 14 Silver SOLD OUT; 10 Bronze SOLD OUT
- (3) Partners: Yardi, Seacoast Bank & APM Help; PAID
- (34+3) PAID

E. [Updated] Exhibitor Brochure – Trade Show Hours

F. Anne Lackey – Handout at National NARPM Conference - Exhibitors

G. VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary

- Michael 1st and Mark 2nd

H. FOLLOW UP w/Exhibitors with Booth # (s) ETC (37) via EMAIL by 1/22

I. Vendor Postcard mailing 8/20

J. Recommend LIVE MUSIC Next Years !! (Michael)

K. Renewed Revised Contract with Laurie @ Elite Venue !!!

- \$350/M emails / \$275/M Website

L. THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!



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Efren Espinoza, Membership/Communications Co-Director

M. WORKSHOPS:

- **DRE Speaker 2X**
- **KTS (3+)**
- **Scott Brady**
- **Rent / Vacancy Control**
- **Section 8 Statewide/City of San Diego**
- **(reviewed) 1st Choice Bank Presentation**
- **... more coming.**

N. SPEAKERS: Melissa Prandi 3rd, Marc Cunningham 1st

- **And now Brad Larsen 3rd Speaker (2nd in line up)**

O. HOTEL VIST (Riviera Hotel): November 2, 2020 GOOD VISIT

P. NARPM Classes: Melissa Prandi; NARPM Grant

Q. UPDATED Conference Brochure February 2020

- **Mailing to 1574 attendees; PSPRINT Postcard/Brochure by 1/27**

R. EMAILED Personal "Letter" to NARPM Membership (CA)

S. NOTE: February Conferences are HARDER due to Holidays

T. Efren working with Donna on ground game in Palm Springs

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Mark W. Scott No updates.

A. IDEA of a COORDINATOR (Proposed)

- **NOT \$20k per year (Sterling) but an Overall Guiding Coordinator**
- **Utilize existing relationship with Laurie @ Elite Venue**
- **NOTE: Too much to handle for a Volunteer Board**

XI. New Business – Mark W. Scott No updates.



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Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, January 29th, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, January 29th, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

a. Called to order 9:30 AM

b. Present: Mark, Michael, Bob, Donna, Cheryl and Anne Lackey

c. Absent: Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 7: AREAS OF EXPERTISE

The Property Manager must provide competent service within his or her area of expertise, and refrain from the unauthorized practice of any other profession for which he or she is not licensed or qualified.

STANDARDS OF PROFESSIONALISM

- **7-1** The Property Manager shall perform only such services in such locations for which he or she is qualified and can reasonably be expected to perform with professional competence.

7-2 The Property Manager shall not perform and shall not represent that he or she can or will perform services outside of his or her area of expertise, particularly services that require a separate license or qualification – such as law, accounting, financial planning, construction, and/or contracting – unless the Property Manager independently possesses such license or qualification.

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the January 18th, 2020 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

NOTE: UPDATED Board Minutes July 2018 – June 2019 coming soon !!!



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Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

IV. Treasurer's Report – Bob Davie

- A. NOTE: New P.O. Box for CALNARPM June 2018
 - CALNARPM, PO Box 27831, San Diego, CA 92198-1831
- B. Report: \$96K Union Bank; \$15K in PayPal; \$111K
 - (\$54K – Exhibitors); \$57K on hand (\$42K prior on hand)
 - 110 attendees signed up as of 1/20/2020
- C. Budget: \$111K + 17K = \$128K; keep \$35K in reserves !!!

V. 2019-2020 Board –Mark W. Scott - President

- A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED
 - Mark W. Scott, President (NEW)
 - Michael Braddon, Past President & Education Director
 - Cheryl-Honorary Past President
 - Bob Davie, Treasurer
 - Donna Gary, Secretary & Conference Chair 2020
 - New Affiliate Chair 2020: Anne Lackey
- B. CALNARPM 2019-2020 Search for President-Elect STARTED
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- A. HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
- B. Facebook CLAIMED ... Thank you Laurie @ EliteVenu
- C. Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!
- D. Exhibitors
 - 10 Gold SOLD OUT; 14 Silver SOLD OUT; 10 Bronze SOLD OUT
 - (3) Partners: Yardi, Seacoast Bank & APM Help; PAID
 - (34+3) PAID
- E. [Updated] Exhibitor Brochure – Trade Show Hours
- F. Anne Lackey – Handout at National NARPM Conference - Exhibitors
- G. VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary
 - Michael 1st and Mark 2nd
- H. FOLLOW UP w/Exhibitors with Booth # (s) ETC (37) via EMAIL by 1/22
- I. Vendor Postcard mailing 8/20
- J. Recommend LIVE MUSIC Next Years !! (Michael)



2019-2020 CALNARPM Board of Directors

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Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Donna Gary, Conference Chair

Michael Braddon, Education Director

Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

K. Renewed Revised Contract with Laurie @ Elite Venue !!!

- \$350/M emails / \$275/M Website

L. THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!

M. WORKSHOPS:

- DRE Speaker 2X
- KTS (3+)
- Scott Brady
- Rent / Vacancy Control
- Section 8 Statewide/City of San Diego
- (reviewed) 1st Choice Bank Presentation
- ... more coming.

N. SPEAKERS: Melissa Prandi 3rd, Marc Cunningham 1st

- And now Brad Larsen 3rd Speaker (2nd in line up)

O. HOTEL VIST (Riviera Hotel): November 2, 2020 GOOD VISIT

P. NARPM Classes: Melissa Prandi; NARPM Grant

Q. UPDATED Conference Brochure February 2020

- Mailing to 1574 attendees; PSPRINT Postcard/Brochure by 1/27

R. EMAILED Personal "Letter" to NARPM Membership (CA)

S. DIGITAL BROCHURE ONLINE 1/24/2020

T. REGISTER NOW POSTCARD MAILED 1/21/2020

U. ATTENDEE BROCHURE PRINTED & MAILED 1/24/2020

V. NOTE: February Conferences are HARDER due to Holidays

W. Efren working with Donna on ground game in Palm Springs

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Michael Braddon No updates.

A. IDEA of a COORDINATOR (Proposed)

- NOT \$20k per year (Sterling) but an Overall Guiding Coordinator



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- Utilize existing relationship with Laurie @ Elite Venue
- NOTE: Too much to handle for a Volunteer Board

XI. New Business – Michael Braddon No updates.

a. CREATE HANDBOOK (FUTURE CONFERENCES)

b. 26th CALNARPM - NAPA MARRIOTT – March 31, 2021 – April 1 & 2, 2021

i. Broker Owner (CT) April 19-21, 2021

ii. PM Grow 2021 ????

XII. Future Meeting Dates – BOD & Conference Committee

a. Wednesday, March 4th, 2020 @ 9:30 AM

XIII. Adjournment – Michael Braddon Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, March 4th, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob, Donna, Cheryl, Bob Preston (new) and Kesha (new)

B. Absent: Anne Lackey, Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 8: COMMITMENT TO FIRM

The Property Manager shall act in the best interests of his or her property management Firm.

STANDARDS OF PROFESSIONALISM

- **8-1** The Property Manager shall not have any undisclosed conflict of interest with his or her Firm. If a conflict or potential conflict should arise, the Property Manager shall notify his or her Firm immediately.
- **8-2** The Property Manager shall not receive any form of compensation, rebates, or any other benefits without full disclosure to his or her Firm.

8-3 The Property Manager may not take or use any proprietary documentation, including but not limited to Client/Tenant lists, during or after his or her relationship with a Firm without express written consent from the Firm.

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the January 29th, 2020 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

- **NOTE: UPDATED Board Minutes July 2018 – June 2019 coming soon !!!**
- **NOTE: Board Minutes July 2019 – June 2020 coming later this summer !!!**
- **CHAPTER COMPLIANCE & EXCELLENCE;**
 - **DUE March 15 & 31, 2020 (Michael Braddon)**



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IV. Treasurer's Report – Bob Davie

- A. NOTE: New P.O. Box for CALNARPM June 2018
 - CALNARPM, PO Box 27831, San Diego, CA 92198-1831
- B. Report: \$96K Union Bank; \$15K in PayPal; \$111K
 - (\$54K – Exhibitors); \$57K on hand (\$42K prior on hand)
 - 110 attendees signed up as of 1/20/2020
- C. Budget: \$111K + 17K = \$128K; keep \$35K in reserves !!!
- D. Final Financial Statement in June 2020
- E. \$1500 National NARPM Charity; APPROVED
 - Note: NO 50/50 Raffle due to Calif Law on gambling

2019-2020 Board –Mark W. Scott - President

- A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED
 - Mark W. Scott, President (NEW)
 - Michael Braddon, Past President & Education Director
 - Cheryl-Honorary Past President
 - Bob Davie, Treasurer
 - Donna Gary, Secretary & Conference Chair 2020
 - New Affiliate Chair 2020: Anne Lackey
- B. CALNARPM 2019-2020 Search for President-Elect STARTED
- C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)
 - Must have contributed to CALNARPM (Volunteering)
 - Held Exhibitor Gold/Silver Status 3 out of 5 Years
 - Good Standing with NARPM
 - NOTE: We reserve the right to choose who is our Corporate Sponsors.
- D. **NOMINATIONS for 2020 BOARD**
 - **Donna Gary, President**
 - **Bob Preston, President-Elect**
 - **Kesha Jenkins or Donna Gary, Secretary (3rd term)**
 - **VOTE BY EMAIL: July 2020**

V. CALNARPM 2020 Conference Committee – Mark W. Scott

- A. Palm Springs Riviera Conference – February 19-21, 2020 Raising the Bar
 - HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
 - Facebook CLAIMED ... Thank you Laurie @ EliteVenu
 - Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!
 - Exhibitors
 - 10 Gold SOLD OUT; 14 Silver SOLD OUT; 10 Bronze SOLD OUT



- (3) Partners: Yardi, Seacoast Bank & APM Help; PAID
- (34+3) PAID
- [Updated] Exhibitor Brochure – Trade Show Hours
- Anne Lackey – Handout at National NARPM Conference - Exhibitors
- VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary
 - Michael 1st and Mark 2nd
- FOLLOW UP w/Exhibitors with Booth # (s) ETC (37) via EMAIL by 1/22
- Vendor Postcard mailing 8/20
- Recommend LIVE MUSIC Next Years !! (Michael)
- Renewed Revised Contract with Laurie @ Elite Venue !!!
 - \$350/M emails / \$275/M Website
- THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!
- WORKSHOPS:
 - DRE Speaker 2X
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 - Scott Brady
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 - (reviewed) 1st Choice Bank Presentation
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- SPEAKERS: Melissa Prandi 3rd, Marc Cunningham 1st
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- NOTE: February Conferences are HARDER due to Holidays
- Efren working with Donna on ground game in Palm Springs

B. "DEBRIEF" AFTER Conference:

- **Need to clarify NARPM Classes vs. Event**
- **Change *** Take the Stage Event *** Location/Time**
- **Increase Rates \$245 / \$295; VOTE NEEDED**
- **Need Expand MARKETING efforts (Michael)**
 - **Michael Volunteered to be Communications Chair**
 - **Goal: Reach outside current membership**
 - **Establish new marketing w/ Laurie @ EliteVenu**
- **Thank you Email to Exhibitors and Attendee(s)**



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- **General Session: Logo(s) Projected**
- **NOTE: Hotel Booking *** REAL PROBLEM *****
 - **Commitment Palm Springs Riviera on Improvement**
 - **Hotel providing a credit (Bob Davie Negotiated)**
 - **Hotel providing a future credit (Bob Davie negotiated)**
- **Bags – good; FTB Table – good**
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- **Announce next classes & get feedback at end of conference**
- **Room monitors stand at door; verify workshops are setup**
- **Possibly establish Past Presidents Committee**

VI. CALNARPM 2021 Conference Committee – Mark W. Scott

A. 26th CALNARPM CONFERENCE (NAPA):

B. NAPA MARRIOTT – March 31, 2021 – April 1 & 2, 2021 (Signed)

- **Broker Owner (CT) April 19-21, 2021**
- **PM Grow 2021 ????**

VII. Communication – Efren Espinoza No updates.

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X. Old Business – Mark W. Scott **No updates.**

A. IDEA of a COORDINATOR (Proposed)

- NOT \$20k per year (Sterling) but an Overall Guiding Coordinator
- Utilize existing relationship with Laurie @ Elite Venue
- NOTE: Too much to handle for a Volunteer Board

XI. New Business – Mark W. Scott **No updates.**

A. CREATE HANDBOOK (FUTURE CONFERENCES)

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, April 30th, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott **Adjourned 10:30 AM**



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, April 30th, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob and Anne Lackey

B. Absent: Donna, Cheryl, Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 9: RELATIONS WITH OTHER PROPERTY MANAGERS

The Property Manager shall not knowingly or recklessly make false or misleading statements about other property managers or their business practices, or otherwise attempt to take business from other property managers by deceptive means.

STANDARDS OF PROFESSIONALISM

- **9-1** The Property Manager shall deal with other property managers in an honest and professional manner and shall not knowingly engage in any practice or take any action against a property manager in an un-businesslike manner.
- **9-2** The Property Manager shall not knowingly interfere with other property managers' contract rights, including by taking actions inconsistent with exclusive agreements that other property managers have with their clients. This does not preclude the Property Manager from otherwise soliciting potential Clients or making general announcements about his or her own services. For purposes of this Code, a general announcement may be defined as a general telephone canvass or a general mailing or distribution addressed to all prospects in a given geographical area or in a specific profession, business, club, organization, or other classification or group. This Code does not restrict fair and reasonable competition among property managers.
- **9-3** In the event of a controversy between Property Managers with different Firms, the Property Manager of the Firm shall use best efforts to resolve the dispute prior to litigation.
- **9-4** The Property Manager shall not obtain or use the proprietary materials or work of a competing management Firm without the express written permission of that Firm.
- **9-5** The Property Manager shall cooperate with other property managers when it is in the best interests of the Client or Tenant to do so.



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Dana Wares, Legislative Director

Efren Espinoza, Membership/Communications Co-Director

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the March 4th, 2020 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

- NOTE: UPDATED Board Minutes July 2018 – June 2019 coming soon !!!
- NOTE: Board Minutes July 2019 – June 2020 coming later this summer !!!
- **CHAPTER COMPLIANCE & EXCELLENCE;**
 - **DUE March 15 & 31, 2020 (Michael Braddon) COMPLETED !!!**

IV. Treasurer's Report – Bob Davie

- A. NOTE: New P.O. Box for CALNARPM June 2018
 - CALNARPM, PO Box 27831, San Diego, CA 92198-1831
- B. Report: \$96K Union Bank; \$15K in PayPal; \$111K
 - (\$54K – Exhibitors); \$57K on hand (\$42K prior on hand)
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- C. **Revised Budget: \$100K; \$40K in reserves !!!**
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 - **Donna Gary, President**
 - **CAN'T ACCEPT NOMINATION; "Surgery/Health"**



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- **Bob Preston, President-Elect/President**
 - **PROPOSED STEPPING UP to President**
- **Donna Gary, Secretary (3rd term) & Co-Conference Chair**
 - **NOTE: Michael will Co-Chair Conference w/Donna**
- **VOTE BY EMAIL: July 2020**

V. CALNARPM 2020 Conference Committee – Mark W. Scott

A. Palm Springs Riviera Conference – February 19-21, 2020 Raising the Bar

- HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
- Facebook CLAIMED ... Thank you Laurie @ EliteVenu
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- **Need to clarify NARPM Classes vs. Event**
- **Change *** Take the Stage Event *** Location/Time**
- **Increase Rates \$245 / \$295; VOTE NEEDED**
- **Need Expand MARKETING efforts (Michael)**
 - Michael Volunteered to be Communications Chair
 - Goal: Reach outside current membership
 - Establish new marketing w/ Laurie @ EliteVenu
- **Thank you Email to Exhibitors and Attendee(s)**
- **General Session: Logo(s) Projected**
- **NOTE: Hotel Booking *** REAL PROBLEM *****
 - Commitment Palm Springs Riviera on Improvement
 - Hotel providing a credit (Bob Davie Negotiated)
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VI. CALNARPM 2021 Conference Committee – Mark W. Scott

A. 26th CALNARPM CONFERENCE (NAPA):

B. NAPA MARRIOTT – March 31, 2021 – April 1 & 2, 2021 (Signed)

▪ **Broker Owner (CT) April 19-21, 2021**

▪ **PM Grow January 20-22, 2021**

C. Donna Gary & Michael Braddon; Co-Chair Conference

D. Michael Braddon – Communications Chair

▪ **Expand MARKETING efforts (new approaches)**

E. Increase Rates \$245 / \$295; VOTE NEEDED (NO QUARUM TODAY)

F. COVID-19 EMERGENCY PLANS:

▪ **PM Grow CANCELLED May 2020**

▪ **Broker/Owner CANCELLED April 2020**

▪ **MAY NEED TO GO VIRTUAL !!!**

VII. Communication – Efren Espinoza No updates.

VIII. Legislative – Dana Wares No updates.

IX. Membership – Efren Espinoza No updates.

X. Old Business – Mark W. Scott No updates.

A. IDEA of a COORDINATOR (Proposed)

▪ **NOT \$20k per year (Sterling) but an Overall Guiding Coordinator**

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▪ **NOTE: Too much to handle for a Volunteer Board**

XI. New Business – Mark W. Scott No updates.

A. CREATE HANDBOOK (FUTURE CONFERENCES)



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XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, May 14th, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, May 14th, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob, Donna, Cheryl and Anne Lackey

B. Guest: Kesha Jenkins

C. Absent: Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 10: TRUTH IN ADVERTISING

The Property Manager shall ensure that all advertising is clear and forthright and includes only accurate and truthful statements about the property or services advertised.

STANDARDS OF PROFESSIONALISM

- **10-1** Regardless of the type of media used, advertising content shall be truthful and honest at all times.
- **10-2** No property shall be offered as “For Rent” without the actual permission of the Client. If an unlisted property is offered, permission must be obtained from the owner.
- **10-3** Disclosure must be made to all parties if information gathered through electronic advertising media may be sold to an outside party.
- **10-4** All marketing materials, whether printed or electronic, shall comply with state laws.

III. Secretary's Report – Mark W. Scott - President

Vote needed to approve the Minutes of the April 30th, 2020 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

- **NOTE: UPDATED Board Minutes July 2018 – June 2019 coming soon !!!**
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- **CHAPTER COMPLIANCE & EXCELLENCE;**
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 - **Donna Gary, President**
 - **CAN'T ACCEPT NOMINATION; "Surgery/Health"**
 - **Bob Preston, President-Elect/President**
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A. CREATE HANDBOOK (FUTURE CONFERENCES)

XII. Future Meeting Dates – BOD & Conference Committee

A. Wednesday, June 3rd, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM



Minutes

2019-2020 Board Meeting & Conference Committee

Monday, June 3rd, 2020

Conference Call 9:30 a.m.

Teleconference - Phone number: (605) 475 4800 code: 717633#

I. Call to Order/Introductions – Mark W. Scott – President

Called to order 9:30 AM

A. Present: Mark, Michael, Bob, Donna, Bob Preston and Anne Lackey

B. Guest: Kesha Jenkins

C. Absent: Cheryl, Efren and Dana

II. NARPM® Code of Ethics – Mark W. Scott – President

Article 11: RESPONSIBILITY TO NARPM® AND THE PROFESSION

The Property Manager shall comply with all policies and pronouncements of NARPM® and all relevant laws and rules of the jurisdiction in which he or she works, and shall strive to stay informed of and to educate others about relevant matters affecting the property management field.

STANDARDS OF PROFESSIONALISM

- **11-1** The Property Manager shall strive to improve the property management profession and NARPM® by sharing with others his or her lessons of experience for the benefit of all.
- **11-2** The Property Manager shall strive to be informed about relevant matters affecting the property management field on a local, state, and national level.
- **11-3** The Property Manager shall maintain his or her real estate license, if a license is required in their state.
- **11-4** The Property Manager shall abide by NARPM®'s bylaws and any other policies and procedures of NARPM®, and shall do no harm to the organization.

11-5 The Property Manager shall ensure that all electronic communications and marketing he or she prepares is professional with respect given to the recipients.



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III. Secretary's Report – *Mark W. Scott - President*

Vote needed to approve the Minutes of the May 14th, 2020 BOD Meeting.

Mark made motion to approve, Bob seconded. All in favor. Motion approved.

- NOTE: UPDATED Board Minutes July 2018 – June 2019 coming soon !!!
- NOTE: Board Minutes July 2019 – June 2020 coming later this summer !!!
- **CHAPTER COMPLIANCE & EXCELLENCE;**
 - **DUE March 15 & 31, 2020 (Michael Braddon) COMPLETED !!!**

IV. Treasurer's Report – Bob Davie

- A. NOTE: New P.O. Box for CALNARPM June 2018
 - CALNARPM, PO Box 27831, San Diego, CA 92198-1831
- B. Report: \$96K Union Bank; \$15K in PayPal; \$111K
 - (\$54K – Exhibitors); \$57K on hand (\$42K prior on hand)
 - 110 attendees signed up as of 1/20/2020
- C. **Revised Budget: \$100K; \$40K in reserves !!!**
- D. **Final Financial Statement in June 2020**
- E. **\$1500 National NARPM Charity; APPROVED**
 - **Note: NO 50/50 Raffle due to Calif Law on gambling**

2019-2020 Board – *Mark W. Scott - President*

- A. BOD slate of candidates sent out July 17, 2019 from email VOTE; APPROVED
 - Mark W. Scott, President (NEW)
 - Michael Braddon, Past President & Education Director
 - Cheryl-Honorary Past President
 - Bob Davie, Treasurer
 - Donna Gary, Secretary & Conference Chair 2020
 - New Affiliate Chair 2020: Anne Lackey
- B. CALNARPM 2019-2020 Search for President-Elect STARTED
- C. New Corporate Sponsor Policy – 3 Rules (APPROVED June 26, 2019)
 - Must have contributed to CALNARPM (Volunteering)
 - Held Exhibitor Gold/Silver Status 3 out of 5 Years
 - Good Standing with NARPM
 - NOTE: We reserve the right to choose who is our Corporate Sponsors.



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D. NOMINATIONS for 2020 BOARD

- **Donna Gary, President**
 - **CAN'T ACCEPT NOMINATION; "Surgery/Health"**
- **Bob Preston, President-Elect/President**
 - **PROPOSED STEPPING UP to President**
- **Donna Gary, Secretary (3rd term) & Co-Conference Chair**
 - **NOTE: Michael will Co-Chair Conference w/Donna**
- **VOTE BY EMAIL: July 2020**

V. CALNARPM 2020 Conference Committee – Mark W. Scott

A. Palm Springs Riviera Conference – February 19-21, 2020 Raising the Bar

- HeroPM released DOMAIN 7/1/2019 – No Charge WE OWN IT !!!
- Facebook CLAIMED ... Thank you Laurie @ EliteVenu
- Exhibitor Registration for Palm Springs Riviera 2020 is OPEN!!!
- Exhibitors
 - 10 Gold SOLD OUT; 14 Silver SOLD OUT; 10 Bronze SOLD OUT
 - (3) Partners: Yardi, Seacoast Bank & APM Help; PAID
 - (34+3) PAID
- [Updated] Exhibitor Brochure – Trade Show Hours
- Anne Lackey – Handout at National NARPM Conference - Exhibitors
- VOTE: APM HELP 3rd Partner; (4) Yes; (1) No, Donna Gary
 - Michael 1st and Mark 2nd
- FOLLOW UP w/Exhibitors with Booth # (s) ETC (37) via EMAIL by 1/22
- Vendor Postcard mailing 8/20
- Recommend LIVE MUSIC Next Years !! (Michael)
- Renewed Revised Contract with Laurie @ Elite Venue !!!
 - \$350/M emails / \$275/M Website
- THEME: "Raising the Bar" February 19-21, 2020; 25th Conference !!!
- WORKSHOPS:
 - DRE Speaker 2X
 - KTS (3+)
 - Scott Brady
 - Rent / Vacancy Control
 - Section 8 Statewide/City of San Diego
 - (reviewed) 1st Choice Bank Presentation
 - ... more coming.
- SPEAKERS: Melissa Prandi 3rd, Marc Cunningham 1st
 - And now Brad Larsen 3rd Speaker (2nd in line up)
- HOTEL VIST (Riviera Hotel): November 2, 2020 GOOD VISIT
- NARPM Classes: Melissa Prandi; NARPM Grant



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- **UPDATED Conference Brochure February 2020**
 - Mailing to 1574 attendees; PSPRINT Postcard/Brochure by 1/27
- **EMAILED Personal "Letter" to NARPM Membership (CA)**
- **DIGITAL BROCHURE ONLINE 1/24/2020**
- **REGISTER NOW POSTCARD MAILED 1/21/2020**
- **ATTENDEE BROCHURE PRINTED & MAILED 1/24/2020**
- **NOTE: February Conferences are HARDER due to Holidays**
- **Efren working with Donna on ground game in Palm Springs**

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E. Anne Lackey (returning) Affiliate Chair !!!

- Take the Stage Event – CHANGE; VOTED – ALL YES !!
- Breakfast with the Brokers & Affiliates (No Buffet)
- Awards, Video Logo(s) & Verbal Recognition
- Exhibitor Registration OPEN / LIVE (Special code Partners)

F. Efren Espinoza (Membership/Communications Director)

- Stepping Down after several years of supporting CALNARPM !!!
- CONFIRMED email of 3/9/2020

G. Increased Rates +\$40; \$245 / \$295; \$295 / \$325 VOTED – ALL YES !!!

H. COVID-19 EMERGENCY PLANS:

- PM Grow CANCELLED May 2020
- Broker/Owner CANCELLED April 2020
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A. Thursday, July 23rd, 2020 @ 9:30 AM

XIII. Adjournment – Mark W. Scott Adjourned 10:30 AM

August 27, 2020

CALNARPM Board of Directors Contact List: 2020-2021 Term

Bob Preston, President

Email: bob@ncpropertygroup.com

Phone (cell): 858-354-8977

Phone (office): 858-792-5797 x100

Adrian Harrell, President Elect, Acting Education/Speaker Committee Chair

Email: adrian@newbridgemanagement.com

Phone (cell): (209) 535-1590

Phone (office): (209) 668-6700

Mark Scott, Past President

Email: mscott@encorerealtysd.com

Phone (office): (619) 470-6000 X 1

Bob Davie, Treasurer

Email: bob@sandiegorpm.com

Phone (cell): (858) 229-9051

Phone (office): (858) 485-6565

Donna Gary, Secretary

Email: donna@ppmdavis.com

Phone (office): (530) 753-7456

Anne Lackey, Affiliate Director

Email: anne@hiresmartvirtualemployees.com

Phone (cell): (678) 389-9929

Ally Kubarych, Communications Committee Chair

Email: ally@ncpropertygroup.com

Phone (cell): (760) 271-1656

Phone (office): (858) 792-5797 x103

Tracey Merrell, Legal Advisory Director

Email: Tracey.Merrell@kts-law.com

Phone: 800.577.4587 x1533

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REGISTER FOR THE EVENT OF THE YEAR!

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National Association of Residential Property Managers
CALIFORNIA STATE CHAPTER



RAISING THE BAR

Reaching Higher Professional Standards



FEB 19-21, 2020
NARPM CALIFORNIA STATE CHAPTER
Conference & Trade Show

25th

RIVIERA HOTEL PALM SPRINGS, CA

In the meantime, make plans to attend one of these important NARPM Education Events.

EDUCATION EVENTS AT THE CALIFORNIA STATE CONFERENCE



Office Operations – Policy & Procedures

February 19, 2020

9am - 4pm

Course Description:

Every brokerage needs a policy and procedure manual to standardize their office operation, especially as they grow and add staff. This course covers the Process from start to finish and includes an overview of trust accounting policy and procedure as an example for the manual.

[Click here for more information about class content.](#)

Instructor: Scott Abernathy, MPM® RMP®

If you have questions about Education Classes

Please contact educationinfo@narpm.org

Register Online or By Form

You can sign up and pay online for education courses by log-in to [Online Registration / eCommerce](#)

OR

[Download registration form](#)



Developing Rewarding Owner Relationships

February 19, 2020

9am - 4pm

Course Description:

This fundamental course covering the four (4) steps in the cycle of owner relations will assist you in developing and managing your clients from first contact to termination. From the big picture to the small details, you will learn industry best practices in obtaining new clients and working with them during several scenarios. [Click here for more information](#)

Instructor: Melissa Prandi, MPM® RMP®

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REGISTRATION IS OPEN!

Early Bird Deadline Has Been Extended!

EARLY BIRD

EARLY BIRD

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(NARPM Members Only)

(Non-Members Only)

Deadline February 10, 2020

Deadline February 10, 2020

\$215

\$255

After February 10, 2020

After February 10, 2020

\$245

\$285

GET MY TICKET EARLY!



**BOOK YOUR HOTEL STAY
THE RIVIERA PALM SPRINGS
A TRIBUTE PORTFOLIO RESORT**

1600 North Indian Canyon Drive
Palm Springs, California 92262

BOOK BY JANUARY 29, 2020

Get a Room!

RAISING THE BAR

Verb. raise the bar. (idiomatic) To raise standards or expectations, especially by creating something to a higher standard.

utilize a **bar** to measure physical accomplishment, the High Jump and the Pole Vault. The first involves running and then jumping over a **bar raised** parallel to the ground at a certain distance.

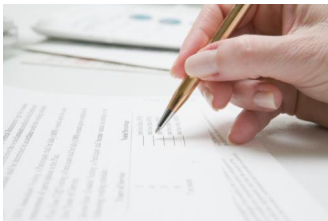
At the CALNARPM Conference you will learn how to run your business successfully in a unique regulatory and challenging business environment and jump over the unique hurdles that Property Managers encounter.

Do you want to take your business to the next level? Increase your standards? Provide more income? Discover all the tips and tricks from the experts. The CALNARPM 2020 conference will teach you how to stay in the game and grow your business and exceed your expectations.

[VISIT THE WEBSITE](#)

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What's New



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All Local Chapters



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CA - 2020 Virtual Hill Visit - Zoom Meeting

NARPM 2020 Legislative Conference Issues Agenda

Congress and the President have had to take extraordinary steps to address the challenges raised by the COVID-19 pandemic. NARPM recognizes their leadership in working to stabilize the nation's economy.

As Congress works on the next phase of COVID-19 legislation, there are additional items that are needed in the next phase of COVID-19 relief to help both landlords and renters.

In the next phase of COVID-19 Relief legislation, please support the following:

- Creation of an emergency rental assistance program for those who are impacted by the COVID-19 crisis.
- Limiting the national eviction moratorium to those negatively impacted by COVID-19, and resisting efforts to expand the moratorium.
- Requiring residents to notify the property owner in writing of COVID-19 related temporary financial hardship and request temporary assistance/relief from the property owner.
- Conforming notices to vacate to existing state and local laws and ordinances.

- Expressly stating the ability of property owners to issue notices to vacate and move forward with evictions for things other than the non-payment of rent (e.g., criminal activity, actions that endanger other residents, etc.).
- Ensuring that forbearance protections remain in place for the same length of time as any local, state, or federal eviction moratoriums.
- Providing financial assistance for property-level financial obligations such as property taxes and insurance payments.

For More information, please contact NARPM Governmental Affairs at legislativeinfo@narpm.org or (804) 673-5684.

Friday, June 5, 2020 – 9:30am Pacific

Office of Rep. Anna Eshoo (CA-18)

Please let us know if you can join us by emailing us at legislativeinfo@narpm.org.

Here is the login information for the call:

[Join Zoom Meeting](#)

Meeting ID: 825 7655 0818

Password: 589348

One tap mobile

+16468769923,,82576550818# US (New York)

+13017158592,,82576550818# US (Germantown)

Dial by your location

+1 646 876 9923 US (New York)

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

Meeting ID: 825 7655 0818

Find your local number: <https://us02web.zoom.us/j/82576550818>



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CALNARPM Year End Financial Report 2020

Hello Cal NARPM Members:

I trust that this finds you and your business doing well, especially during the trying times we are all experiencing.

It has been my pleasure to serve as your state treasurer for this wonderful organization for the past few years. And, as per the bylaws of Cal NARPM, I am providing you with the annual financial report (attached). Specifically, I am providing you with the organization's annual [Profit and Loss statement](#) for the fiscal year beginning 7/1/2019 and ending 6/30/2020. This report shows the revenue and the expenses for that one-year period. Although the report indicates a loss for the fiscal year, this is an expected occurrence and the association ended the year with more than \$40,000 in cash assets, which is right where the board at that time expected to be!

I am also providing the [Balance Sheet report](#) as of 6/30/2020 which shows the financial health of the organization as a "snapshot in time" and indicates that there are significant assets (cash) available for the future conferences and upcoming educational opportunities.

The current board is working diligently under the leadership of our new president, Bob Preston to deliver value-added, informative, educational and "best-practice" learning opportunities in a web-based platform which will be scheduled this upcoming spring! Please be on the look-out for more

In the meantime, please contact me directly with questions you may have regarding the organization's financials.

Best Regards,
Bob Davie
Cal-NARPM State Treasurer
bob@sandiegorpmpm.com



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Don't Miss the CALNARPM March 2020 Upcoming
Local Chapter Events!

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National Association of Residential Property Managers
C A L I F O R N I A S T A T E C H A P T E R

National Association of Residential Property Managers

CALNARPM e-NEWSLETTER

LOCAL CHAPTER EVENTS

EVENT CALENDAR!

CALNARPM has a collection of your local chapter events in one calendar area on our website. Don't forget to submit your event to Laurie Lindsey
Laurie@elitevenu.com to be included in the event calendar.

[Event Calendar](#)

March 2020 LOCAL CHAPTER EVENTS



SACRAMENTO & CENTRAL VALLEY

BENEFITING THROUGH DETAILED PROPERTY INSPECTIONS

Tuesday, March 17, 2020

11:30am - 1:30pm

Mack Powell Event Center

[REGISTER](#)

[WEBSITE](#)



SANTA CLARA

MAINTENANCE: BEYOND THE BASICS

Wednesday, March 18, 2020

9:00am - 4:00pm

[WEBSITE](#)

SAN DIEGO

NEW WORKPLACE LAWS & AB 5

Learn How The New California Regulations Impact Property Managers

Wednesday, March 18, 2020

SDAR

[REGISTER](#)

[WEBSITE](#)



MONTHLY MEMBERSHIP MEETING WITH ALLISON DISARRO

Thursday, March 19, 2020

11:30am - 1:30pm

Monterey County Association of Realtors

[REGISTER](#)

[WEBSITE](#)



LONG BEACH / ORANGE COUNTY

THE NARPM ACCOUNTING STANDARDS "IT'S NOT STANDARD IF NOBODY'S
ON IT"

The NARPM® Accounting Standards (NAS) is designed to improve the property management industry by establishing a standard of accounting practices for its members. Specifically, the goal of the NAS is to create and endorse a set of accounting standards that will provide uniformity around accounting practices.

Thursday, March 19, 2020

11:30am – 1:00pm

Business Expo Center

[REGISTER](#)

[WEBSITE](#)



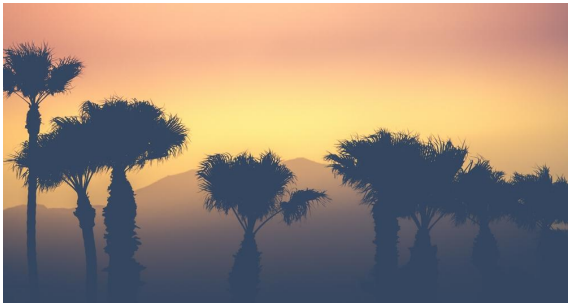


LOS ANGELES

POSTPONED MONTHLY NETWORKING: NARPM LOS ANGELES CHAPTER - March 18, 2020

Please be advised that in the interest of everyone's safety, the March 18, 2020 networking meeting for the Los Angeles Chapter of NARPM has been postponed. We will work with planned speaker, Pam Strickland, to schedule a future date for her presentation on Trust Funds and the latest DRE rules. We appreciate your understanding.

[WEBSITE](#)



ALAMEDA/CONTRA COSTA COUNTIES

Check Back Later

[WEBSITE](#)

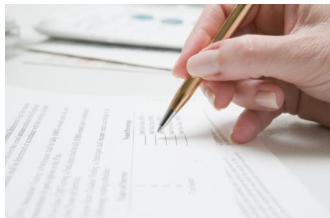


MARIN / SONOMA

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It's Easy!



What's New



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National Association of Residential Property Managers

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July 2020 LOCAL CHAPTER EVENTS



LONG BEACH / ORANGE COUNTY

Evolve or Die: 36 Months to Extinction or Evolution in Property Management

Tony Cline of HomeVault Academy will be presenting on “Evolve or Die: 36 Months to Extinction or Evolution in Property Management”. Tony is an industry thought leader and runs his own thriving property management company out of Denver, Colorado. He will share the changes in our industry and what innovative companies are doing to thrive in this time of disruption.

Thursday, July 16, 2020

12:00pm – 1:00pm

Virtual Meeting

[REGISTER](#)

[WEBSITE](#)





SANTA CLARA

ZOOM MEETING STATE OF THE RENTAL HOUSING INDUSTRY

An overview of State and local regulations facing the industry.

Thursday, July 16, 2020

12:00pm to 1:30pm

Virtual Meeting

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MONTEREY BAY

PET SCREENING- WITH BRIAN BIRDY

Thursday, July 16, 2020

11:30am - 1:30pm

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[WEBSITE](#)



SAN DIEGO



SACRAMENTO & CENTRAL VALLEY

NO EVENTS SCHEDULED

[WEBSITE](#)



LOS ANGELES

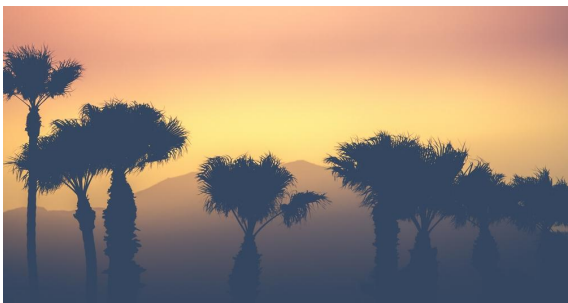
NO EVENTS SCHEDULED



ALAMEDA/CONTRA COSTA COUNTIES

Check Back Later

[WEBSITE](#)



MARIN / SONOMA

Check Back Later

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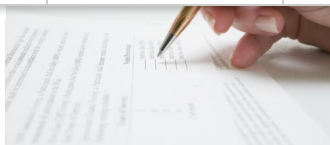
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MARCH 11-12, 2021

REGISTER NOW AND GET EARLY BIRD PRICING!

A portion of your conference registration fee will be donated to the California Wildfire Relief Fund!

Here are the details for this year's exciting, innovative, and essential California State Chapter Conference and Tradeshow! If you are a property manager operating within the State of California, you will not want to miss this event! Register now to get the early bird ticket price.

[View Schedule](#)

[View Workshop Descriptions](#)



NARPM Member

Before February 15, 2021

\$99

After February 15, 2021

\$149

[Get My Ticket Early](#)



Non-Member

Before February 15, 2021

\$149

After February 15, 2021

\$199

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EXPERT PANEL



Brad Larsen

Broker/Owner- RentWerx Property
Management



Deb Newell

Executive Consultant/ MPM, RMP,
REALTOR- Real-Time Consulting
Services



Andrew Smallwood

Vice President Revenue- Second
Nature



Marc Cunningham

President- Grace Property
Management & Real Estate



Bob Preston

President CALNARPM,
Broker/Owner- North County Property Group

KEYNOTE SPEAKERS



BILL BENJAMIN

The Calm Person In The Boat:
Emerging Stronger From The
California Covid-19 Surge



JESSE BRISENDINE

Breaking Mental And Emotional
Barriers In CA Property
Management: The New
Organizational Super Power

BREAKOUT SESSION SPEAKERS



Aaron Harnel

Senior Sales Manager, YARDI Breeze
Do You Need an Office Post-COVID?



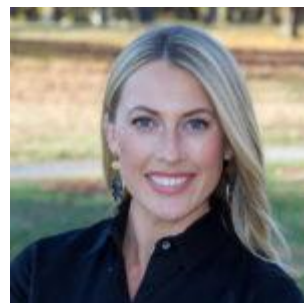
Heather & Michael Park

Co-Founder and Managing Partner,
RentBridge
Shifting California Property Management Toward
Automation



Anne Lackey

Co-Founder, Hire Smart Virtual Employees
California Property Management Staffing is
Evolving – Are you?



Allison Disarro

SVP Relationship Manager, Enterprise Bank
(formerly Seacoast Commerce Bank)
California Broker Trust Account Compliance



Andrew Smallwood

Vice President of Revenue, Second Nature
The Future of California Property Management



Corena de Sonnaville

Supervising Auditor, CA Department of Real Estate (DRE)
Everything You Wanted to Know But Were Afraid to Ask: The truth from the CA DRE Auditor



Scott Brady

Broker/Owner, Progressive Property Management, Placentia CA
Healing and Growth After the California Stay at Home Order: Owner and Tenant Marketing Programs that Generate Additional Revenue and Doors



Lucinda Lilley

CPM, CAPS, GRI, FBS Property Management, San Diego CA
Hindsight is 2020: Past Preparation Creates Virtual Maintenance Success!



Brian Birdy

PMI Birdy Properties, San Antonio TX
Thrive or Survive: Growth Strategies for All California Markets



Tracey Merrell

Managing Attorney of Education, Kimball, Tirey, & St. John LLP, Los Angeles CA
CA 2021 Legislative Update, Knowledge is Power





Zachary Berkompas

*Head of Customer Success, Lead Simple,
Vancouver WA*

Going from 0-60 with Processes, Gearing up the
California Growth Opportunity

Concord CA
Proper Protection Essentials: Insurance, The
other PPE for California Property Management



Jordan Levine

*Vice President & Chief Economist at
CALIFORNIA ASSOCIATION OF REALTORS®*
Expert Insight to CA RE Market After COVID and
the Impact for PMs in 2021



Bob Preston

*RMP, MPMC, CALNARPM President, North
County Property Group, Del Mar CA*
Customer Loyalty in a Changing California
Landscape: Ten Best Practices for PM
Relationship Management



Niv Davidovich

*Managing Partner, Davidovich/Stein Law Group,
North Hollywood CA*
California Evictions in the Age of COVID



Justin Rhinesmith

National Tenant Network NorCal, Concord CA
Tips, Tricks & Best Practices for Effective and
Legal Screening of California Tenants



Sonia Caramazza, Chanel Yates & Daisy Sanchez

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CALNARPM Year End Financial Report 2020

Hello Cal NARPM Members:

I trust that this finds you and your business doing well, especially during the trying times we are all experiencing.

It has been my pleasure to serve as your state treasurer for this wonderful organization for the past few years. And, as per the bylaws of Cal NARPM, I am providing you with the annual financial report (attached). Specifically, I am providing you with the organization's annual [Profit and Loss statement](#) for the fiscal year beginning 7/1/2019 and ending 6/30/2020. This report shows the revenue and the expenses for that one-year period. Although the report indicates a loss for the fiscal year, this is an expected occurrence and the association ended the year with more than \$40,000 in cash assets, which is right where the board at that time expected to be!

I am also providing the [Balance Sheet report](#) as of 6/30/2020 which shows the financial health of the organization as a "snapshot in time" and indicates that there are significant assets (cash) available for the future conferences and upcoming educational opportunities.

The current board is working diligently under the leadership of our new president, Bob Preston to deliver value-added, informative, educational and "best-practice" learning opportunities in a web-based platform which will be scheduled this upcoming spring! Please be on the look-out for more

In the meantime, please contact me directly with questions you may have regarding the organization's financials.

Best Regards,
Bob Davie
Cal-NARPM State Treasurer
bob@sandiegorpmpm.com



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CALNARPM - VOTE NEEDED New Nominated Exec Board 2020-2021

Fellow California NARPM members,

We need your VOTE for the newly nominated Executive Board members for 2020-2021.

Please VOTE Yes/No BY RELPYING to this EMAIL ...

... narpmcalifornia@gmail.com ...

... for our slate of new Nominated Executive Board members for **2020-2021**.

The term is 1 year and voluntary position(s).

... for the year of July 1, 2020 - June 30, 2021

NOTE: The nominees are volunteers, they can after being voted in decline the position for any reason, in such case the Board will act according to our by-laws to find a successor.

Bob Preston as incoming President

President | Broker

Bob Preston is the owner and founder of North County Property Group. Bob first obtained his California Real Estate license in 1986. He has been a part of the Del Mar community as a North County San Diego homeowner, resident and business owner since 1998. Bob enjoys working with his clients to share his knowledge of this amazing community, specializing in the greater North County San Diego real estate market. Bob is a licensed California Real Estate Broker (CA DRE #00919073), General Contractor (#892437), and REALTOR member of the North San Diego County Association of Realtors (#181799). With over 25 years of experience as an owner of his own investment properties, Bob has built North County Property Group from his own real estate experiences, fulfilling the unique needs of residential investment property owners and their renters/tenants.

Donna Gary returning Secretary

Donna Gary is a licensed Real Estate Broker with the California Department of Real Estate. Property management was a natural transition for Donna after spending 20 years in mortgage banking for a local Davis firm. As a Davis native, she is deep rooted in the community and appreciates the need for quality real estate management. Her personal and professional commitment to honesty, integrity and excellence, support positive relationships and personalized service that clients appreciate and value.

Bob Davie returning Treasurer

Bob Davie is the Broker/Owner of San Diego Residential Property Management, a San Diego based property management firm. Although born in Southern California, Bob grew up in the Phoenix area and attended Arizona State University, receiving a degree in Management. Bob has 30 years of professional business experience, much of that time spent in the real estate and property management fields where he has acquired tremendous expertise in marketing, handling landlord/tenant issues, communication, managing client expectations together with providing exemplary customer service. Bob spent 15 years working for major corporations such as Wendy's International and Hallmark Cards before starting SDRPM.

We had a successful 25th Annual CALNARPM Conference at the Riviera Palm Springs and we are already working on next year; keeping your safety and health in mind.

Thank you,

Mark W. Scott

Current CALNARPM President 2019-20

EMAILED TO EACH CHAPTER July 17, 2020 @ 6 PM - MJB

Alameda – C017 (45) (49) **(48)**

Monterey – C012 (39) (43) **(45)**

Los Angeles – C060 (24) (30) **(42)**

Santa Clara – C010 (65) (57) **(62)**

San Diego – C024 (88) (93) **(94)**

Marin – C019 (46) (63) **(55)**

Long Beach – C094 (36) (38) **(55)**

Sacramento – C004 (133) (117) **(129)**

Total individual email sent (476) (490) **(530)**

Bob Preston

From: Donna Gary <donna@ppmdavis.com>
Sent: Tuesday, August 25, 2020 4:34 PM
To: Bob Preston
Subject: RE: Donna, please vote on this

Yes

From: Bob Preston [mailto:bob@ncpropertygroup.com]
Sent: Tuesday, August 25, 2020 3:46 PM
To: Donna Gary
Subject: Donna, please vote on this

Donna, can we please get your vote on adding Adrian Harrell to make it complete?
Thank you,
Bob

From: Mark Scott <msscott@encorerealtysd.com>
Sent: Saturday, August 22, 2020 10:02 PM
To: Bob Davie <bob@sandiegorgpm.com>; Bob Preston <bob@ncpropertygroup.com>; Donna Gary <donna@ppmdavis.com>
Subject: Re: Adrian Harrell nomination for CalNARPM Education/Speaker Committee and President Elect

I vote yes

Thank you,
Mark W. Scott
Broker
DRE #01197311

From: Bob Davie <bob@sandiegorgpm.com>
Sent: Friday, August 21, 2020 4:29:38 PM
To: Bob Preston <bob@ncpropertygroup.com>; Donna Gary <donna@ppmdavis.com>
Cc: Mark Scott <msscott@encorerealtysd.com>
Subject: RE: Adrian Harrell nomination for CalNARPM Education/Speaker Committee and President Elect

I vote YES!

Regards,

Bob



Bob Davie
Broker / Owner
San Diego Residential Property Management
"Your Home, Our Passion"
P: 858.485.6565
C: 858.229.9051
www.sandiegorgpm.com

CA DRE # 01859951

How did Bob do for you today?



Your feedback is valuable and will only take a few seconds. Click or tap the rating that best represents your experience. Thank You!

From: Bob Preston <bob@ncpropertygroup.com>

Sent: Friday, August 21, 2020 3:54 PM

To: Bob Davie <bob@sandiegoprpm.com>; Donna Gary <donna@ppmdavis.com>

Cc: 'Mark W. Scott (mark@encorealtysd.com)' <mark@encorealtysd.com>

Subject: Adrian Harrell nomination for CalNARPM Education/Speaker Committee and President Elect

Hi CalNARPM Exec Committee ~ Bob D and Donna, I've contacted you both already about this so please VOTE either YES or NO by email response. You can also defer for now if you wish to speak with the candidate before casting your vote, that can be easily arranged as part of the vetting process.

I've been attending the August local chapter meetings to pitch CalNARPM and our open positions. One candidate in particular has come forward with enthusiastic interest. Her name is Adrian Heller and I spoke with her at length today. Adrian offered Keith Becker as a reference so I also called him today and he had nothing but positive things to say about her.

As such, I would like to nominate Adrian Herrell of New Bridge Property Management to join the board as Education/Speaker Committee Chair and Exec Committee as President Elect. Please remember that we are considering 2 year terms so there is plenty of time for her to grow into that position and we need to fill the Exec Committee spot.

Regarding a vote on Adrian, she would be considered an officer so a vote is required, this is what the By Laws say:

1. Eligibility = individual shall be a CalNARPM and NARPM member in good standing (both boxes are checked)
2. A "vacated office" (after elections have been held and longer than 3 months until the next annual election) shall be filled by an individual nominated and approved by the CALNARPM Executive Committee (Bob P., Bob D., Donna). Just an FYI that today, according to By Laws, as Past President, Mark is technically not part of the exec committee. This is a change that is on the table for revision with the next modification forthcoming.

Thank you and please VOTE either YES or NO or express desire to speak with her in advance.

Have a great weekend, feel free to call me if any questions or concerns!

Bob

Cell: (858) 354-8977

Here is her Bio:

Adrian Harrell is the owner/broker of New Bridge Management in the Central Valley.

She has a long history of participating in various organizations and community involvement including:

- Secretary of the Alumni Council, Chairman Alumni Association, Cal State Stanislaus
- Secretary of the NARPM Central Valley Chapter for two years (before it closed) – reference Keith Becker
- President, Modesto Sister Cities International: <https://www.linkedin.com/company/modesto-sister-cities-international-inc/>
- Current member NARPM National Government Affairs Committee – reference Tyler Craddock

She is very energetic, enthusiastic, and would bring great energy to the team. Here are some other bio and background note:

- Masters Degree in International Business - Thunderbird
- New Bridge Website: <https://www.newbridgemanagement.com>
- Social Media: https://twitter.com/aharrell_nbm
- LinkedIn: <https://www.linkedin.com/in/adrian-harrell-b3a324/>



Adrian S. Harrell

Adrian Harrell is President, CEO and Principal Property Manager at New Bridge Management, which manages the real estate portfolios of investors. Previously, she worked for G3 Enterprises and Ashley Investments, LLC managing other large real estate portfolios. Prior to her work in real estate, Adrian worked in Europe consulting for Fortune 200 companies on market penetration strategies in Western and Eastern Europe, Middle East and North Africa.

Harrell has served the CSU Stanislaus Foundation Board since 2015. She has served on the Alumni Advisory Council since May 2014 and was the Chair of Alumni Association from 2016 - 2020. She currently represents the University on the CSU Alumni Council at the state level where she currently serves on the executive committee as Council Secretary and a member of the Trustee Evaluation and Selection Committee.

Harrell holds a Master of International Management from Thunderbird School of Global Management and a Master of International Business Administration from Alliant International University-San Diego Scripps Ranch. Harrell also holds a California Real Estate Broker's license and has completed two certificate programs in Negotiation and Mediation at Harvard School of Law.

Harrell chaired the Vines Event Committee and lead a team during One Purpose to raise funds for CSU Stanislaus for several years. She also planned the 2018 Fundraising Gala. She was the President of the Modesto Sister Cities International organization from 2009 – 2019 and still serves as board executive. In that role she managed the city's international relationships with its seven sister cities around the world. Harrell has held leadership roles at numerous other local community and national organizations such as the Central Valley Professional Exchange, Central Valley Association of Realtors and National Association of Residential Property Managers. For her dedication to the community, Harrell was recognized as Good Neighbor of the Year and Woman of the Year for Developing International Goodwill and Understanding.

Bylaws of

The California Chapter of **The National Association of Residential Property Managers (CALNARPM)**

ARTICLE I: Name, Purposes, Powers and Definitions

Section A: Name

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

Section B: Purpose

The purposes for which the organization is established are to:

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

Section C: Powers

CALNARPM may exercise all powers granted to it as a corporation organized under the non-profit corporation laws of the State of California.

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

Section D: This chapter's geographical definition shall be: The State of California

ARTICLE II: Membership

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

Section A: Professional Member

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

A Professional Member may also be an employee of a company, or employee of a property owner, or employee of an investor, who handles all aspects of residential property management. These individuals must comply with state licensing laws, but do not hold an active real estate license.

Section C: Support Staff

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

Section D: Affiliate Member

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

Section I: Application by Professional Support Staff Members:

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

ARTICLE III: Suspension, Termination and Resignation of Membership

Section A: Suspension of Membership

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

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

Section B: Termination of Membership

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

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

Section C: Reinstatement of Membership

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

1. Upon request, if such request is received during the calendar year during which a resignation occurred.
2. Upon request, provided that all financial indebtedness incurred has been paid and is current.

3. After a waiting period of one calendar year from the date of termination as a result of a presidential request or by an action of the board of directors of the national association.
4. Upon request through the normal application procedures, if the resignation occurred beyond the current fiscal year.

ARTICLE IV: Executive Committee/Board of Directors

Section A: Responsibilities

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

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

Section B: The Executive Committee

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

1. President: The president shall:
 - a. Be the chief executive officer of the chapter.
 - b. Preside at all meetings of the chapter.
 - c. Act as an alternate signatory for funds withdrawn from the chapter account(s).
 - d. Sign all legal documents.
 - e. Undertake responsibility for such other activities as deemed appropriate by the committee.
 - f. Shall ensure the completion of all documentation required by the National Association.
 - g. Serve a term of one year commencing with the beginning of the new calendar year.
 - h. Must be a Professional Member of the Chapter.
 - i. Must attend annual Board Leadership Training offered by the National Association of Residential Property Managers.

2. President-Elect: The president-elect shall:

- a. Act as an alternate signatory for funds to be withdrawn from the chapter account(s).
- b. Fulfill the responsibilities of the president during his/her absence.
- c. Replace the president at the end of the fiscal year.
- d. Automatically accede to the presidency during a calendar year when the presidency becomes vacant.
- e. Undertake other activities as are deemed appropriate by the president.
- f. Serve a term of one year commencing July 1 through June 30.
- g. Must be a Professional Member of the Chapter.

3. Secretary: The secretary shall:

- a. Maintain current chapter membership records to coincide with the national association's membership database.
- b. Record, maintain and distribute minutes of all regular and special meetings of the committee as appropriate.
- c. File all federal, state and local reports as needed.
- d. Undertake responsibility for such other activities as deemed appropriate by the committee.
- e. Serve a term of one year commencing July 1 through June 30.
- f. Must be a Professional Member of the Chapter.

4. Treasurer: The treasurer shall:

- a. Be a signatory for all funds withdrawn from chapter account(s).
- b. Distribute annual renewal notices for chapter dues and special assessments.
- c. Deposit all funds into a federally insured financial institution.
- d. Prepare a financial report for the committee upon request.
- e. Prepare an end-of-fiscal year report for the national association.
- f. File tax and other financial reports with the appropriate government agencies.
- g. Undertake responsibility for other such activities as deemed appropriate by the committee.
- h. Serve a term of one year commencing July 1 through June 30.
- i. Must be a Professional Member of the Chapter.

6. Past President

- a. Shall serve as Chairman of the Nominating Committee
- b. Undertake responsibilities as assigned by the President
- c. Serve a term of one year commencing July 1 through June 30.

Section C: The Directors

- 1. Serve as a Committee Chair
- 2. Undertake responsibility for such other activities as deemed appropriate by the Board.
- 3. Serve a term of one (1) year, July 1 through June 30

ARTICLE V: Eligibility, Nominations, Elections, Terms of Office and Vacancies

Section A: Eligibility

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

Section B: Notification of Members

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

- a. Write-in: Any member who writes in the name of a nominee shall provide a signed letter from the individual so nominated indicating the said individual's willingness to serve if elected and received at least thirty (30) days prior to the election.
- b. In Person: Any member who is present during the electoral process can be nominated.

Section C: Elections

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

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

Section D: Term of Office

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

Section E: Vacancy

An office shall be declared vacant when an officer:

1. Resigns that office through written notification to the president or the secretary.
2. Is no longer eligible for membership in the chapter or the national association.
3. Is no longer capable of fulfilling duties of the office involved as determined by a two-thirds vote of the Board of Directors.

Section F: Filling a Vacated Office

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

1. When: When more than three (3) calendar months remain before the next election at which the vacancy shall be filled.
2. Procedure: By an individual nominated and approved by the executive committee **to fill the remaining year of the term. At the next election, the remainder of the term for the office must be filled through the nominations process.**

ARTICLE VI: Meetings, Locations and Majority Rules

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

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

Section B: Location

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

Section C: Quorum

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

Section D: Simple Majority Vote

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

ARTICLE VII: Committees

Section A: Appointment

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

Section B: Responsibilities

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

Section C: Creation and Dissolution

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

ARTICLE VIII: Code of Ethics & Standards of Professionalism.

Acknowledgment and Enforcement

As a condition of membership, all Professional Members of NARPM® must complete a NARPM® Code of Ethics training once within a four year period, beginning January 1, 2012, and each four year period thereafter. Each Professional Member of the association is required to complete a NARPM® approved ethics training either in classroom or through other means as approved by the board of directors of NARPM® National.

Failure to satisfy this requirement will result in the professional members reverting to an associate member until course is completed.

Section A: Acknowledgment

A Chapter Charter is granted **by the National Association of Residential Property Managers** only upon the acknowledgment that the chapter members shall:

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

Section B: Enforcement

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

ARTICLE IX: Financial Considerations

Section A: Calendar Year

The chapter's financial year shall be July 1st through June 30th.

Section B: Chapter Dues

The Chapter may charge annual and pro-rated dues, subject to approval by the national association, as outlined below:

1. Payable: Dues for local chapters are payable no later than July 1st.
2. Non-payment of Dues: Failure to pay the annual chapter dues within 60 days after the first day of the year shall result in automatic termination of chapter membership unless there are extenuating circumstances.

3. Member Dues: The amount of the Chapter dues for all members and each class of membership shall be established annually by the board of directors during the budgeting process.
4. Affiliate dues: The amount of local chapter dues for Affiliate dues shall be established annually by the board of directors during the budgeting process. The chapter will not charge dues to National Affiliate members.
5. Late Fees: Any payment received after the due date will be considered late, and a late fee will be assessed. The Board of Directors must approve any schedule of late fees or returned check fees during the budgeting process.

Section C: Special Assessments

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

Section D: Budget

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

Section E: Non-Binding

The chapter shall not have any authority to financially obligate or bind the **National Association of Residential Property Managers** for any reason.

ARTICLE X: Proposals and Procedures for Amending

Section A: Proposals

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

Section B: Procedure for Amending

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

Once approved by the Chapter Executive Committee, amendments shall be subject to approval by the board of directors of the **National Association of Residential Property Managers** prior to their implementation or adoption by the chapter and a final copy of these bylaws are to remain on file at national's office.

ARTICLE XI: Miscellaneous

Section A: Invalidity

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

Section B: Waiver

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

Section C: Hold Harmless and Indemnify

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

Section D: State Laws

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

Section E. Sexual Harassment

Any member of the Association may be reprimanded, placed on probation, suspended or expelled for harassment of an Association employee or Association Officer or Director after a hearing in accordance with the established procedures of the Association. As used in the Section, harassment means any verbal or physical conduct including threatening or obscene language, unwelcome sexual advances, stalking, actions including strikes, shoves, kicks, or other similar physical contact, or threats to do the same, or any other conduct with the purpose or effect of unreasonably interfering with an individual's work performance by creating a hostile, intimidating or offensive work environment. The decision of the appropriate disciplinary action to be taken shall be made by the investigatory team comprised of the President, and President-Elect and one member of the Board of Directors selected by the highest ranking officer not named in the complaint, upon consultation with legal counsel for the Association. If the complaint names the President, or President-Elect, they may not participate in the proceedings and shall be replaced by the Immediate Past President or, alternatively, by another member of the Board of Directors selected by the highest ranking officer not named in the complaint.

Section E: Dissolution

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

ARTICLE XI: Annual Reports and Statements

Section A: Annual Report. If CALNARPM receives more than \$10,000 in gross revenues or receipts during the fiscal year, and if required by law, the executive committee will have an annual report prepared within 120 days after the end of CALNARPM's fiscal year. That report will contain the following information in appropriate detail:

1. Financial Reports. A balance sheet as of the end of the fiscal year, an income statement, and statement of changes in financial position for the fiscal year, accompanied by an independent accountants' report or, if none, by the certificate of an authorized officer of CALNARPM that they were prepared without audit from CALNARPM's books and records; and
2. Membership List. A statement of the place where the names and addresses of current members are located.

If an annual report is prepared, CALNARPM will notify each member of the member's right to receive a copy of the financial report. On written request by a member, the executive committee will promptly send most recent annual report to any requesting member. If the executive committee approves, CALNARPM may send the report and any accompanying material electronically.

Section B. Annual Statement Of Certain Transactions And Indemnifications. Within 120 days after the end of CALNARPM's fiscal year, CALNARPM will send its members and the executive committee members a statement of any transaction or indemnification of the following kinds:

1. Interested Party Disclosure. Unless approved by members under Corporations Code §7233(a), any transaction:
 - a. To which CALNARPM, its parent, or its subsidiary was a party;
 - b. Which involved more than \$50,000 or was one of a number of transactions with the same person involving more than \$50, 000 in the aggregate; and
 - c. In which either of the following interested persons had a direct or indirect material financial interest (a mere common directorship is not a material financial interest):
 - (1) Any director or officer of CALNARPM, its parent, or its subsidiary; or
 - (2) Any holder of more than 10 percent of the voting power of CALNARPM, its parent, or its subsidiary.

The statement will include a brief description of the transaction, the names of interested persons involved, their relationship to CALNARPM, the nature of their interest in the transaction, and, when practicable, the amount of that interest (except that, in a partnership in which such person is a partner, only the partnership interest need be stated).

2. Loan, Guaranty or Indemnification to Officer or Director. A brief description of the amounts and circumstances of any loans, guaranties, indemnifications, or advances aggregating more than \$10,000 paid during the fiscal year to any officer or director of CALNARPM, unless the loan, guaranty, indemnification, or advance has already been approved by the members under Corporations Code § 5034, or the loan or guaranty is not subject to Corporations Code § 7235(a).

ARTICLE XII: Indemnification and Insurance

Section A: Indemnification. To the fullest extent permitted by law, this corporation may indemnify its directors (executive committee members), officers, employees, and other persons described in Corporations Code § 7237(a), including persons formerly occupying any such positions, against all expenses, judgments, fines, settlements, and other amounts actually and reasonably incurred by them in connection with any "proceeding," as that term is used in those sections, and including an action by or in the right of the corporation, by reason of the fact that the person is or was a person described in that section. "Expenses," as used in this bylaw, will have the same meaning as in that section of the Corporations Code.

On written request to the board by any person seeking indemnification under Corporations Code §7237(b) or (c), the board will promptly decide under Corporations Code § 7237(e) whether the applicable standard of conduct described in Corporations Code §7237(b) or (c) has been met and, if so, the board will authorize indemnification. If the board cannot authorize indemnification because the number of directors who are parties to the proceeding for which indemnification is sought prevents the formation of a quorum of directors who are not parties to that proceeding, the directors may seek the approval of the court in which the proceeding is or was pending, on application by the corporation, the defendant agent, or the attorney providing the agent's defense.

To the fullest extent permitted by law and except as otherwise determined by the board in a specific instance, expenses incurred by a person seeking indemnification under this article in defending any proceeding covered by this article will be advanced by the corporation before final disposition of the proceeding, provided that the corporation has received an undertaking by or on behalf of that person that the advance will be repaid unless it is ultimately found that the person is entitled to be indemnified by the corporation for those expenses.


Section B: Insurance. This corporation will have the right to purchase and maintain insurance to the full extent permitted by law on behalf of its officers, directors, employees, and other agents, to cover any liability asserted against or incurred by any officer, director, employee, or agent in such capacity or arising from the officer's, director's, employee's, or agent's status as an officer, director, employee or agent.

ADOPTION OF BYLAWS


We, the undersigned, are all of the members of the initial board of directors (also known as the executive committee) of this corporation, and we consent to, and hereby do, adopt the foregoing Bylaws, consisting of 13 preceding pages, as the Bylaws of this corporation.

DATE: January 30, 2018

DocuSigned by:

Michael Braddon 

DocuSigned by:

Bob Davie 

74BAAFC07626B44F...

7331D0804E8846D...

DocuSigned by:

Cheryl Chase-Berkson

DocuSigned by:


39BAF41EFC3E4A3...

B694D39E96AB49A...

CERTIFICATE OF THE SECRETARY

I certify that I am the duly elected and acting Secretary of the California Chapter of the Nation Association of Resident Property Managers, a California nonprofit mutual benefit corporation; that these Bylaws, consisting of 14 pages (including the signature page for the executive committee members, but not including this Certificate), are the Bylaws of this corporation as adopted by the board of directors (also known as the executive committee) on **January 30, 2018**; and that these Bylaws have been amended or modified since that date.

Executed on **January 30, 2018** via **DocuSign** at offices of current acting president 1210 28th Street, San Diego, CA 92102.

DocuSigned by:

B694D39E96AB49A...
Secretary

Form **990-EZ**

Short Form

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

2019
**Open to Public
Inspection**
Department of the Treasury
Internal Revenue Service

} Do not enter social security numbers on this form, as it may be made public.

} Go to www.irs.gov/Form990EZ for instructions and the latest information.**A For the 2019 calendar year, or tax year beginning , and ending****B** Check if applicable:

- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
**CALIFORNIA STATE CHAPTER OF
NATIONAL ASSOCIATION OF RESIDENTIAL**

Number and street (or P.O. box, if mail is not delivered to street address)

16516 BERNARDO CENTER DR, SUITE 330

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

SAN DIEGO CA 92128**D** Employer identification number**20-1862735****E** Telephone number**858-485-6565****F** Group ExemptionNumber **u****G** Accounting Method: ☒ Cash ☐ Accrual Other (specify) **u****I** Website: **WWW.NARPMCALIFORNIA.ORG****H** Check ☒ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).**J** Tax-exempt status (check only one) — ☐ 501(c)(3) ☒ 501(c) (**6**) | (insert no.) ☐ 4947(a)(1) or ☐ 527**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other**L** Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets(Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ **u** \$ **139,501****Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)Check if the organization used Schedule O to respond to any question in this Part I ☒

Revenue	1	Contributions, gifts, grants, and similar amounts received	1	504
	2	Program service revenue including government fees and contracts	2	138,997
	3	Membership dues and assessments	3	
	4	Investment income	4	
	5a	Gross amount from sale of assets other than inventory	5a	
	b	Less: cost or other basis and sales expenses	5b	
	c	Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)	5c	
	6	Gaming and fundraising events:		
	a	Gross income from gaming (attach Schedule G if greater than \$15,000)	6a	
	b	Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)	6b	
c	Less: direct expenses from gaming and fundraising events	6c		
d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)	6d		
7a	Gross sales of inventory, less returns and allowances	7a		
b	Less: cost of goods sold	7b		
c	Gross profit or (loss) from sales of inventory (subtract line 7b from line 7a)	7c		
8	Other revenue (describe in Schedule O)	8		
9	Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8	9	139,501	
Expenses	10	Grants and similar amounts paid (list in Schedule O)	10	1,000
	11	Benefits paid to or for members	11	
	12	Salaries, other compensation, and employee benefits	12	
	13	Professional fees and other payments to independent contractors	13	1,510
	14	Occupancy, rent, utilities, and maintenance	14	
	15	Printing, publications, postage, and shipping	15	5,970
	16	Other expenses (describe in Schedule O)	16	133,673
17	Total expenses. Add lines 10 through 16	17	142,153	
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 9)	18	-2,652
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	100,915
	20	Other changes in net assets or fund balances (explain in Schedule O)	20	
	21	Net assets or fund balances at end of year. Combine lines 18 through 20	21	98,263

For Paperwork Reduction Act Notice, see the separate instructions.

Form **990-EZ** (2019)

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V ☐

	Yes	No
33 Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O		X
34 Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name. Otherwise, explain the change on Schedule O. See instructions		X
35a Did the organization have unrelated business gross income of \$1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?		X
b If "Yes" to line 35a, has the organization filed a Form 990-T for the year? If "No," provide an explanation in Schedule O		
c Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III		X
36 Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N		X
37a Enter amount of political expenditures, direct or indirect, as described in the instructions u 37a		
b Did the organization file Form 1120-POL for this year?		X
38a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee; or were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?		X
b If "Yes," complete Schedule L, Part II, and enter the total amount involved 38b		
39 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9 39a		
b Gross receipts, included on line 9, for public use of club facilities 39b		
40a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 u ; section 4912 u ; section 4955 u		
b Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		
c Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 u		
d Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Enter amount of tax on line 40c reimbursed by the organization u		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T		X
41 List the states with which a copy of this return is filed u NONE		
42a The organization's books are in care of u BOB DAVIE Telephone no. u 858-485-6565 16516 BERNARDO CENTER DRIVE STE 330 Located at u SAN DIEGO CA ZIP + 4 u 92128		
b At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country u See the instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		X
c At any time during the calendar year, did the organization maintain an office outside the United States? If "Yes," enter the name of the foreign country u		X
43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 — Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the tax year u 43		
44a Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		X
b Did the organization operate one or more hospital facilities during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ		X
c Did the organization receive any payments for indoor tanning services during the year?		X
d If "Yes" to line 44c, has the organization filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
45a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ. See instructions		X

- 46** Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I

	Yes	No
46		X

Part VI Section 501(c)(3) Organizations Only

All section 501(c)(3) organizations must answer questions 47–49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI ☐

- 47** Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II

	Yes	No
47		

- 48** Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E

48		
-----------	--	--

- 49a** Did the organization make any transfers to an exempt non-charitable related organization?

49a		
------------	--	--

- b** If "Yes," was the related organization a section 527 organization?

49b		
------------	--	--

- 50** Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees, and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation

- f** Total number of other employees paid over \$100,000 **▶**

- 51** Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation

- d** Total number of other independent contractors each receiving over \$100,000 **▶**

- 52** Did the organization complete Schedule A? **Note:** All section 501(c)(3) organizations must attach a completed Schedule A **▶** ☐ Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer BOB DAVIE	Date TREASURER
	Type or print name and title	

Paid Preparer Use Only	Print/Type preparer's name VLADIMIR RAICEVIC, CPA	Preparer's signature VLADIMIR RAICEVIC, CPA	Date 02/16/20	Check <input type="checkbox"/> if self-employed	PTIN P00091538
	Firm's name } CAREY & RAICEVIC CPAS, INC.			Firm's EIN } 20-3521071	
	Firm's address } 9939 HIBERT ST., SUITE 206 SAN DIEGO, CA 92131-1031			Phone no. 858-566-8020	

- May the IRS discuss this return with the preparer shown above? See instructions **▶** ☒ Yes ☐ No

SCHEDULE O
(Form 990 or 990-EZ)Department of the Treasury
Internal Revenue Service**Supplemental Information to Form 990 or 990-EZ**Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

u Attach to Form 990 or 990-EZ.

u Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2019**Open to Public
Inspection**

Name of the organization

**CALIFORNIA STATE CHAPTER OF
NATIONAL ASSOCIATION OF RESIDENTIAL**

Employer identification number

20-1862735**FORM 990-EZ, PART I, LINE 16 - OTHER EXPENSES****DESCRIPTION****AMOUNT****EXPENSES****MARKETING** \$ 108**SOCIAL MEDIA/EMAIL CAMPAIGNS** \$ 3,050**WEBSITE SERVICES** \$ 2,962**CONSTANT CONTACT FEE** \$ 459**MAIL CHIMP** \$ 536**POST OFFICE BOX** \$ 128**SOFTWARE APPLICATIONS** \$ 550**OFFICE SUPPLIES** \$ 24**MERCHARGE ACCOUNT FEES** \$ 3,997**MEALS & ENTERTAINMENT** \$ 74**REIMBURSABLE EXPENSE** \$ -722**CONFERENCE AUDIO VISUAL** \$ 808**CONFERENCE FACILITIES** \$ 91,224**CONFERENCE SPEAKERS** \$ 15,331**CONFERENCE EXPENSE** \$ 398**SUPPLIES/GIFTS/RAFFLE ITEMS** \$ 2,846**CA FTB FILING FEE** \$ 10**CA REGISTRY FEE** \$ 50**CA SOS REGISTRATION FEE** \$ 20**REGISTRATION FEES REFUNDS** \$ 11,820**TOTAL \$ 133,673**

Name of the organization	Employer identification number
CALIFORNIA STATE CHAPTER OF	20-1862735

FORM 990-EZ, PART II, LINE 24 - OTHER ASSETS

DESCRIPTION	BEG. OF YEAR	END OF YEAR
PREPAID EXPENSES AND DEFERRED CHARGES	\$ 5,000	\$ 5,000
TOTAL	\$ 5,000	\$ 5,000

FORM 990-EZ, PART III - PRIMARY EXEMPT PURPOSE

ESTABLISH A PERMANENT TRADE ASSOCIATION IN THE RESIDENTIAL PROPERTY MANAGEMENT INDUSTRY IN THE STATE OF CALIFORNIA. TO PROMOTE A STANDARD OF BUSINESS ETHICS, PROFESSIONALISM AND FAIR PRACTICES AMONG ITS MEMBERS. TO ESTABLISH AND PROMOTE EDUCATION OF ITS MEMEBERS. TO PROVIDE AND PROMOTE AN EXCHANGE OF IDEAS REGARDING RESIDENTIAL PROPERTY MANAGEMENT.

GENERAL INFORMATION

NAME: MARK SCOTT
ADDRESS 5130 BONITA ROAD STE B
CITY, STATE ZIP CODE: BONITA, CA 91902
FOREIGN COUNTRY:
FOREIGN STATE OR PROVINCE:
HOURS PER WEEK
ORGANIZATION: 6.00
RELATED:

CONTACT

PRINCIPAL? NO
SIGNATURE? NO
USE ORG ADDR? YES

OTHER INFORMATION

POSITION OFFICER
BOOKS IN CARE? NO
FORMER? NO
TITLE PRESIDENT
OFFICER TYPE INDIVIDUAL

COMPENSATION

ORGANIZATION

RELATED

BASE: _____
BONUS/INCENTIVE: _____
OTHER: _____
RETIREMENT/DEFERRED BENEFITS: _____
OTHER COMP/NONTAXABLE: _____

OTHER

EXPENSE ACCOUNT AND
OTHER ALLOWANCES:
EXPENSE ACCOUNT FOR
UNRELATED BUSINESS:

SCHEDULE J

ORGANIZATION

RELATED

NONTAXABLE BENEFITS: _____
PRIOR YEAR: _____

SEVERANCE:
NONQUALIFIED PLAN:
EQUITY BASED:
RECEIVED COMP FROM UNRELATED? NO

SCHEDULE K

TIME DEVOTED TO BUSINESS:
COMPENSATION ATTRIBUTABLE
TO UNRELATED BUSINESS

FUNCTIONAL EXPENSE ALLOCATION

PROGRAM SERVICE: _____
MANAGEMENT & GENERAL: _____
FUNDRAISING: _____

INCOME ALLOCATION

NET INVESTMENT: _____
ADJUSTED NET: _____
CHARITABLE PURPOSE: _____

PROGRAM SERVICE ACCOMPLISHMENTS

FIRST: _____
SECOND: _____
THIRD: _____
OTHER: _____

GENERAL INFORMATION

NAME: BOB DAVIE
ADDRESS 16516 BERNARDO CENTER DRIVE STE 300
CITY, STATE ZIP CODE: SAN DIEGO, CA 92128
FOREIGN COUNTRY:
FOREIGN STATE OR PROVINCE:
HOURS PER WEEK
ORGANIZATION: 4.00
RELATED:

CONTACT

PRINCIPAL? NO
SIGNATURE? YES
USE ORG ADDR? YES

OTHER INFORMATION

POSITION OFFICER
BOOKS IN CARE? YES
FORMER? NO
TITLE TREASURER
OFFICER TYPE INDIVIDUAL

COMPENSATION

ORGANIZATION

RELATED

BASE: _____
BONUS/INCENTIVE: _____
OTHER: _____
RETIREMENT/DEFERRED BENEFITS: _____
OTHER COMP/NONTAXABLE: _____

OTHER

EXPENSE ACCOUNT AND
OTHER ALLOWANCES:
EXPENSE ACCOUNT FOR
UNRELATED BUSINESS:

SCHEDULE J

ORGANIZATION

RELATED

NONTAXABLE BENEFITS: _____
PRIOR YEAR: _____

SEVERANCE:
NONQUALIFIED PLAN:
EQUITY BASED:
RECEIVED COMP FROM UNRELATED? NO

SCHEDULE K

TIME DEVOTED TO BUSINESS:
COMPENSATION ATTRIBUTABLE
TO UNRELATED BUSINESS

FUNCTIONAL EXPENSE ALLOCATION

PROGRAM SERVICE: _____
MANAGEMENT & GENERAL: _____
FUNDRAISING: _____

INCOME ALLOCATION

NET INVESTMENT: _____
ADJUSTED NET: _____
CHARITABLE PURPOSE: _____

PROGRAM SERVICE ACCOMPLISHMENTS

FIRST: _____
SECOND: _____
THIRD: _____
OTHER: _____

GENERAL INFORMATION

NAME: DONNA GARY
ADDRESS 429 F STREET STE 7B
CITY, STATE ZIP CODE: DAVIS, CA 95616
FOREIGN COUNTRY:
FOREIGN STATE OR PROVINCE:
HOURS PER WEEK
ORGANIZATION: 4.00
RELATED:

CONTACT

PRINCIPAL? NO
SIGNATURE? NO
USE ORG ADDR? YES

OTHER INFORMATION

POSITION OFFICER
BOOKS IN CARE? NO
FORMER? NO
TITLE SECRETARY
OFFICER TYPE INDIVIDUAL

COMPENSATION

ORGANIZATION

RELATED

BASE: _____
BONUS/INCENTIVE: _____
OTHER: _____
RETIREMENT/DEFERRED BENEFITS: _____
OTHER COMP/NONTAXABLE: _____

OTHER

EXPENSE ACCOUNT AND
OTHER ALLOWANCES:
EXPENSE ACCOUNT FOR
UNRELATED BUSINESS:

SCHEDULE J

ORGANIZATION

RELATED

NONTAXABLE BENEFITS: _____
PRIOR YEAR: _____

SEVERANCE:
NONQUALIFIED PLAN:
EQUITY BASED:
RECEIVED COMP FROM UNRELATED? NO

SCHEDULE K

TIME DEVOTED TO BUSINESS:
COMPENSATION ATTRIBUTABLE
TO UNRELATED BUSINESS

FUNCTIONAL EXPENSE ALLOCATION

PROGRAM SERVICE: _____
MANAGEMENT & GENERAL: _____
FUNDRAISING: _____

INCOME ALLOCATION

NET INVESTMENT: _____
ADJUSTED NET: _____
CHARITABLE PURPOSE: _____

PROGRAM SERVICE ACCOMPLISHMENTS

FIRST: _____
SECOND: _____
THIRD: _____
OTHER: _____

Forms 990 / 990-EZ Return Summary

For calendar year 2019, or tax year beginning _____, and ending _____

CALIFORNIA STATE CHAPTER OF NATIONAL ASSOCIATION OF RESIDENTIAL

20-1862735

Net Asset / Fund Balance at Beginning of Year 100,915

Revenue

Contributions	<u>504</u>	
Program service revenue	<u>138,997</u>	
Investment income	<u> </u>	
Capital gain / loss	<u> </u>	
Fundraising / Gaming:		
Gross revenue	<u> </u>	
Direct expenses	<u> </u>	
Net income	<u> </u>	
Other income	<u> </u>	
Total revenue		<u>139,501</u>

Expenses

Program services	<u> </u>	
Management and general	<u> </u>	
Fundraising	<u> </u>	
Total expenses		<u>142,153</u>
Excess / (deficit)		<u>-2,652</u>

Changes

Net Asset / Fund Balance at End of Year **98,263**

Reconciliation of Revenue

Total revenue per financial statements	<u> </u>
Less:	
Unrealized gains	<u> </u>
Donated services	<u> </u>
Recoveries	<u> </u>
Other	<u> </u>
Plus:	
Investment expenses	<u> </u>
Other	<u> </u>
Total revenue per return	

Reconciliation of Expenses

Total expenses per financial statements	<u> </u>
Less:	
Donated services	<u> </u>
Prior year adjustments	<u> </u>
Losses	<u> </u>
Other	<u> </u>
Plus:	
Investment expenses	<u> </u>
Other	<u> </u>
Total expenses per return	

Balance Sheet

	Beginning	Ending	Differences
Assets	<u>100,915</u>	<u>98,263</u>	
Liabilities	<u> </u>	<u> </u>	
Net assets	<u>100,915</u>	<u>98,263</u>	<u>-2,652</u>

Miscellaneous Information

Amended return

Return / extended due date **05/15/20**

Failure to file penalty

TAXABLE YEAR

2019

California Exempt Organization Annual Information Return

FORM

199

Calendar Year 2019 or fiscal year beginning (mm/dd/yyyy) , and ending (mm/dd/yyyy)

Corporation/Organization name **CALIFORNIA STATE CHAPTER OF
NATIONAL ASSOCIATION OF RESIDENTIAL**

California corporation number

2706445

Additional information. See instructions.

FEIN

20-1862735

Street address (suite or room)

16516 BERNARDO CENTER DR., SUITE 330

PMB no.

City

SAN DIEGO

State

CA

Zip code

92128

Foreign country name

Foreign province/state/country

Foreign postal code

- A** First Return ☐ Yes ☒ No
- B** Amended Return ☐ Yes ☒ No
- C** IRC Section 4947(a)(1) trust ☐ Yes ☒ No
- D** Final Information Return?
- I** ☐ Dissolved ☐ Surrendered (Withdrawn) ☐ Merged/Reorganized
- Enter date: (mm/dd/yyyy) **I** _____
- E** Check accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other
- F** Federal return filed? (1) ☐ 990T (2) ☐ 990PF (3) ☐ Sch H (990)
- (4) ☒ Other 990 series
- G** Is this a group filing? See instructions ☐ Yes ☒ No
- H** Is this organization in a group exemption ☐ Yes ☒ No
- If "Yes," what is the parent's name? _____
- I** Did the organization have any changes to its guidelines not reported to the FTB? See instructions. ☐ Yes ☒ No

- J** If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. **N/A** ☐ Yes ☐ No
- K** Is the organization exempt under R&TC Section 23701g? ☐ Yes ☒ No
- If "Yes," enter the gross receipts from nonmember sources \$ _____
- L** If organization is a public charity exempt under R&TC Section 23701d and meets the filing fee exception, check box. No filing fee is required. ☐ Yes ☒ No
- M** Is the organization a Limited Liability Company? ☐ Yes ☒ No
- N** Did the organization file Form 100 or Form 109 to report taxable income? ☐ Yes ☒ No
- O** Is the organization under audit by the IRS or has the IRS audited in a prior year? ☐ Yes ☒ No
- P** Is federal Form 1023/1024 pending? ☐ Yes ☒ No
- Date filed with IRS _____

Part I Complete Part I unless not required to file this form. See General Information B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	1	138,997	00
	2	Gross dues and assessments from members and affiliates	2		00
	3	Gross contributions, gifts, grants, and similar amounts received	3	504	00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3.			
	This line must be completed. If the result is less than \$50,000, see General Information B				
	4		139,501	00	
	5	Cost of goods sold	5		00
	6	Cost or other basis, and sales expenses of assets sold	6		00
Expenses	7	Total costs. Add line 5 and line 6	7		00
	8	Total gross income. Subtract line 7 from line 4	8	139,501	00
Filing Fee	9	Total expenses and disbursements. From Side 2, Part II, line 18	9	142,153	00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	10	-2,652	00
	11	Total payments	11		00
	12	Use tax. See General Information K	12		00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11	13		00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12	14		00
	15	Filing fee \$10 or \$25. See General Information F	15	10	00
	16	Penalties and Interest. See General Information J	16		00
	17	Balance due. Add line 12, line 15, and line 16. Then subtract line 11 from the result	17	10	00
	Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.			
Signature of officer u		Title TREASURER	Date	Telephone 858-485-6565	
Paid Preparer's Use Only	Preparer's signature u VLADIMIR RAICEVIC, CPA	Date 02/16/2020	Check if self-employed <input type="checkbox"/>	PTIN P00091538	
	Firm's name (or yours, if self-employed) u CAREY & RAICEVIC CPAS, INC.	Firm's FEIN 20-3521071			
	Address 9939 HIBERT ST., SUITE 206 SAN DIEGO, CA 92131-1031	Telephone 858-566-8020			
May the FTB discuss this return with the preparer shown above? See instructions <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No					

CALIFORNIA STATE CHAPTER OF 20-1862735

Part II Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts — complete Part II or furnish substitute information.

Receipts from Other Sources	1 Gross sales or receipts from all business activities. See instructions	1	138,997	00
	2 Interest	2		00
	3 Dividends	3		00
	4 Gross rents	4		00
	5 Gross royalties	5		00
	6 Gross amount received from sale of assets (See Instructions)	6		00
	7 Other income. Attach schedule	7		00
	8 Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	8	138,997	00
	9 Contributions, gifts, grants, and similar amounts paid. Attach schedule SEE STATEMENT 1	9	1,000	00
	10 Disbursements to or for members	10		00
	11 Compensation of officers, directors, and trustees. Attach schedule SEE STATEMENT 2	11		00
	12 Other salaries and wages	12		00
	13 Interest	13		00
	14 Taxes	14		00
	15 Rents	15		00
	16 Depreciation and depletion (See instructions)	16		00
	17 Other Expenses and Disbursements. Attach schedule SEE STATEMENT 3	17	141,153	00
	18 Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	18	142,153	00

Schedule L Balance Sheet

	Beginning of taxable year		End of taxable year	
	(a)	(b)	(c)	(d)
Assets				
1 Cash		95,915		93,263
2 Net accounts receivable				
3 Net notes receivable				
4 Inventories				
5 Federal and state government obligations				
6 Investments in other bonds				
7 Investments in stock				
8 Mortgage loans				
9 Other investments. Attach schedule				
10 a Depreciable assets				
b Less accumulated depreciation				
11 Land				
12 Other assets. Attach schedule. STMT 4		5,000		5,000
13 Total assets		100,915		98,263
Liabilities and net worth				
14 Accounts payable				
15 Contributions, gifts, or grants payable				
16 Bonds and notes payable				
17 Mortgages payable				
18 Other liabilities. Attach schedule				
19 Capital stock or principal fund				
20 Paid-in or capital surplus. Attach reconciliation				
21 Retained earnings or income fund		100,915		98,263
22 Total liabilities and net worth		100,915		98,263

Schedule M-1 Reconciliation of income per books with income per return

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000

1 Net income per books	-2,652	7 Income recorded on books this year not included in this return. Attach schedule	
2 Federal income tax		8 Deductions in this return not charged against book income this year. Attach schedule	
3 Excess of capital losses over capital gains		9 Total. Add line 7 and line 8	
4 Income not recorded on books this year. Attach schedule		10 Net income per return.	
5 Expenses recorded on books this year not deducted in this return. Attach schedule		Subtract line 9 from line 6	-2,652
6 Total. Add line 1 through line 5	-2,652		

Statement 3 - Form 199, Part II, Line 17 - Other Expenses

<u>Description</u>	<u>Amount</u>
ACCOUNTING	\$ 1,510
POSTAGE & PRINTING	5,970
CONFERENCE AUDIO VISUAL	808
CONFERENCE FACILITIES	91,224
CONFERENCE SPEAKERS	15,331
SUPPLIES/GIFTS/RAFFLE ITEMS	2,846
SOCIAL MEDIA/EMAIL CAMPAIGNS	3,050
WEBSITE SERVICES	2,962
CONSTANT CONTACT FEE	459
MAIL CHIMP	536
POST OFFICE BOX	128
MEALS & ENTERTAINMENT	74
CONFERENCE EXPENSE	398
CA FTB FILING FEE	10
CA REGISTRY FEE	50
CA SOS REGISTRATION FEE	20
REGISTRATION FEES REFUNDS	11,820
MARKETING	108
SOFTWARE APPLICATIONS	550
OFFICE SUPPLIES	24
MERCHARGE ACCOUNT FEES	3,997
REIMBURSABLE EXPENSE	-722
TOTAL	<u>\$ 141,153</u>

Statement 4 - Form 199, Schedule L, Line 12 - Other Assets

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>
PREPAID EXPENSES	\$ 5,000	\$ 5,000
TOTAL	<u>\$ 5,000</u>	<u>\$ 5,000</u>

Form 199 Return Summary

For calendar year 2019, or tax year beginning _____, and ending _____

CALIFORNIA STATE CHAPTER OF **20-1862735**
NATIONAL ASSOCIATION OF RESIDENTIAL

Gross sales / receipts	<u>138,997</u>	
Dues from members	<u> </u>	
Contributions / grants	<u>504</u>	
Total costs	<u> </u>	
Expenses	<u>142,153</u>	
Excess / (deficit)		<u><u>-2,652</u></u>
Filing fee	<u>10</u>	
Total payments	<u> </u>	
Penalties and interest	<u> </u>	
Use tax	<u> </u>	
Balance due		<u>10</u>
Refund		<u><u> </u></u>

	Balance Sheet		
	Beginning	Ending	Differences
Assets	<u>100,915</u>	<u>98,263</u>	
Liabilities	<u> </u>	<u> </u>	
Net assets	<u><u>100,915</u></u>	<u><u>98,263</u></u>	<u><u>-2,652</u></u>

Miscellaneous Information

Amended return _____
 Return / extended due date 05/15/20



Cal NARPM Board Meeting Minutes

Thursday, July 23, 2020

Zoom Video Meeting 9:00 a.m.

- I. 9:00 am - Call to Order/Introductions** – Bob Preston – President
 - a. Present: Bob Preston, Bob Davie, Donna Gary, Mark Scott, Anne Lackey
 - b. Absent: Michael Braddon, Ally Kubarych
- II. Minutes From Last Meeting and Secretary's Report** – Michael Braddon – acting Secretary in Donna's absence – not present. Those present from last meeting verbally reviewed what took place at the last meeting
- III. Treasurer's Report** – Bob Davie
 - Explained Fiscal Year of July 1, 2019 – June 30, 2020 just concluded.
 - Union Bank account balance approximately \$39,000 end of FY
 - PayPal account balance approximately \$6,000 end of FY
 - Balance sheet asset of \$5,000 as deposit to Marriott Napa for 2021 Conference end of FY
 - Further reviewed large checking account transactions appearing on the Union Bank
 - Determined next payment of \$5,000 is due to Marriott Napa end of December 2020 (90 days prior to event date of March 30, 2021)
 - It was discussed that an Annual Report is to be prepared by Bob D. and to be reviewed at the next board meeting and August.
- IV. 2020-2021 Board**
 - a. BOD slate of candidates sent out July 17, 2020 for email VOTE; Approved and Ratified
 - Executive Officers (4):
 - Bob Preston, President
 - TBD, President-Elect
 - Bob Davie, Treasurer
 - Donna Gary, Secretary
 - At Large/Appointed Board Members (5):
 - Mark Scott, Past President
 - Michael Braddon, Conference Committee Chair
 - Ally Kubarych, Communications Committee Chair
 - TBD, Speaker/Education Committee Chair
 - Affiliate Chair, Anne Lackey

V. Meeting Schedule for 2020 – 2021

- a. It was proposed by Bob P. and agreed by the Board that meetings shall take place monthly, on a recurring basis, the 3rd Thursday of each month at 11am. Next meeting set for that time on August 20th

VI. Outreach to National NARPM and Local CA Chapters

- a. Bob P. discussed the outreach he conducted to introduce himself and the new slate of Executive Officers to national leadership, CA local chapter leadership, as well as key influencers and past presidents of Cal NARPM. Outreach and contact was received well with lots of enthusiasm and support offered by those contacted.

VII. By Laws Review

- a. The CalNARPM By Laws were discussed and Bob P. reviewed several areas within the By Laws requiring further study and follow up:
 - i. First of all, the copy being reviewed is an unsigned version and it was suggested that it may not be the most current. Bob took the action item to follow up with National to make sure we are working from the most current version
 - ii. Should the board consider directors insurance or is the chapter covered by National? Bob P. took the action item to follow up with National.
 - iii. Possible amendments to consider once we have the most current version of the By Laws:
 - 1. Include Past President as an Executive Officer
 - 2. Reduce total number of Board Members from 9 to 7
 - 3. Eliminate section pertaining to membership and dues

VIII. Committees

- a. Conference Committee – Michael Braddon, Chairman
- b. Communications Committee – Ally Kubarych, Chair
- c. Education/Speaker Committee - TBD

IX. Old Business

- a. The pending decision regarding an “in-person” conference at the Marriott Napa or a virtual event due to the current COVID-19 pandemic was discussed. It was determined to wait until the August meeting to discuss in greater detail after some of the board members have a chance to attend to upcoming virtual events and can provide feedback on the technology used as a platform for the event.

X. New Business – No Updates

XI. Future Meeting Dates – BOD

- a. Thursday, August 20, 2020 @ 11:00 AM

XII. Adjournment – Bob Preston, adjourned at 10:05 am



Cal NARPM Board Meeting Minutes

Thursday, October 15, 2020

Zoom Video Meeting 9:00 a.m.

I. 9:00 am - Call to Order

- a. Present: Bob Preston, Bob Davie, Donna Gary, Mark Scott, Anne Lackey, Ally Kubarych, Adrian Harrell

II. Virtual Zoom meeting –

- a. Adrian provided a brief report of successful virtual meeting zoom event. Meeting was attended by 20 registered participants with 8 speakers presenting.

III. Minutes From 9/17/2020 Meeting and Secretary's Report –

Reviewed verbally by Adrian. Motion to approve made by Bob D. and approved unanimously

IV. Treasurer's Report – Bob Davie

- Bob submitted 2019 Fiscal Report to Bob Preston for review first week in October. Items submitted included P&L, Balance Sheet and Statement of Financial Status. Bob P. will review and send to Laurie for release to the membership. Bob D. requested release occur in late October.
- Bob D. reports that all bills are paid current.

V. President's Report

- Bob P. discovered during his by-law update research that Michael Braddon had bylaws in progress from 2018. Bob reviewed document and determined that it was detailed enough to retain and felt there was no need for revision at this time. Michael Braddon offered to complete the document and submit to National for ratification.
- Bob P. announced new conference committee members: Laura McNin and Mike Connelly
- Bob reported that the logo has been finalized and Ally has updated the websites.
- Second Nature has committed to be a conference partner. Their fee is \$3500. Bob inquired as to their interest in providing their sponsorship in lieu of the regular \$3500 fee. They have yet to confirm their interest. Bob noted that additional costs may come into play for a dashboard.
- Bob suggested sending out pre email video for a soft introduction directing participants tips for maneuvering the conference website

VI. Convention Committee Report - Adrian

- Adrian reports that they are in "good shape".

VII. Speaker/Education Committee - Adrian

- Adrian and Mike Dunkey have finalized speakers and are now targeting key note speakers and reviewing information for the upcoming conference.
- Next speaker/zoom event is planned for January or February
- Adrian contacted Gail from National to inquire as to the importance and requirement for pre-conference classes. She was told it is up to CalNarpm. National currently has a large selection virtually so the need for pre-conference classes is no longer as critical.
- Bob suggested having a January event to cover prior year overview impactful events and legal updates. Adrian suggested that we should wait for the elections outcome to determine event topics.
- Ally and Adrian will send out a call for speakers to the membership

VIII. Communications Chair Report - Ally

- Website is all up to date
- Ally is working on finalizing the sponsorship packet
- October newsletter was sent last week and had a 20% open rate
- Ballot Measure email was sent out and had a good open rate
- Call for speakers and the CalNarpm financial report email is scheduled for release later this month.
- Committee is now working on mail chimp for database maintenance which will be used going forward.
- Constant contact will be likely be used for event registration
- Mail chimp cost \$45 per mo.
- Constant Contact approximately \$45 per month
- There was discussion as to retention of Mail Chimp and Constant Contact. Ally plans to explore other database platforms that may be more affordable.
- Bob P. will update Constant Contact logins and passwords to remove old users and add new users
- Adrian suggested implementing policy enforcement for change whenever there is a change in authorized users.



2020-2021 CALNARPM Board of Directors

Bob Preston, President

Mark Scott, Past President

Donna Gary, Secretary

Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Adrian Harrell, President Elect/Speaker & Education Chair

Ally Kubarych, Communications Chair

IX. Affiliate Committee Report – Anne

- Anne Continues to work on sponsorship. She has secured a number of sponsors
- Anne has completed brochure, pricing and website details but decided not to send mailers. She will send an email to all vendor groups
- Anne plans to do one push before the end of the year and follow up with another in January
- All key slots are filled

Meeting Adjourned 10:01 – Motioned by Adrian, approved unanimously

Next Meeting November 19, 2020 9:00am



2020-2021 CALNARPM Board of Directors

Bob Preston, President

Mark Scott, Past President

Donna Gary, Secretary

Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Adrian Harrell, President Elect/Speaker & Education Chair

Ally Kubarych, Communications Chair

Tracey Merrel, Advisory Director

Cal NARPM Board Meeting Minutes

Thursday, January 21, 2021

Zoom Video Meeting 9:00 a.m.

I. 9:00 am - Call to Order

- Present: Bob Preston, Bob Davie, Donna Gary, Anne Lackey, Ally Kubarych, Tracey Merrel, Mark Scott, Adrian Harrell

II. Communications Committee – Ally Kubarych

- Ally provided an update with the following keypoints:

With some delays there has been a lot of progress on the website pages including the following:

Main conference page updated

2021 Affiliates are updated

Website shows donations slated for California Wildfire Relief fund

Workshops and speakers have been defined

Schedule of events is complete

Adrian gathered bios and photos for conference speakers

Bob D. noted that website updates with conference pages are “top notch” and Bob P. recognized the outstanding efforts by Adrian and Ally

Social media promotion has begun

Ally suggested we push out early bird registration to provide more opportunity for registration

Bob D. noted several delays in USPS recently and encouraged pushing out early bird registration immediately. All members agreed.

Email blast is scheduled to go out before this weekend

III. Conference Committee- Anne Lackey

- Due to a possible time conflict for this meeting, Anne submitted her status summary in writing to the board.
- There was discussion regarding the importance of a DJ for the upcoming event. Mark moved to approve a \$1500 DJ expense. Motion was seconded by Bob D – all board was in favor. Bob P. will sign the agreement.
- Bob P. noted that as we near the conference, the conference committee is meeting every two weeks.
- Bob P. noted that he has been unable to persuade National to provide points for conference attendees booth visits.
- Adrian noted that initial agreements negotiated with speakers require key note speakers to review their plan with a committee member prior to the event. She and Bob P. will meet with them.
- Adrian will provide Bob D. with invoices for presenters.

IV. Treasurer's Report – Bob Davie

- Bob D. provided financial information prior to the meeting
- Current UB balance is \$34,647.00
- Pay Pal balance is \$25,000.00
- A credit was received from PS Print of approximately \$60
- Marriot delivered a \$5,000 check for reimbursement of the 2019 deposit for the Napa facility. Bob D. noted that receiving the full deposit refund is unusual but appreciated.
- Anne requested a refund be issued to Tenant Turner for an overpayment of \$1500.00. They had inadvertently paid twice.
- Anne will remind Silver Sponsors that all of their attendees must register for the conference. It was noted that Gold Sponsors are permitted one complimentary attendee.
- Bob D. reports all bills have been paid in full to date.
- Bob D. will arrange for tax preparation for State and Federal Compliance. He will also complete and file the 990 form.
- Bob D. will complete and submit the Statement of Information to CA Secretary of State as required.
- To date 16 Affiliates have paid including 7 @ \$500 and 7 @ \$1500. Appfolio's check has not been received but Bob D. will check PO Box and confirm with Anne.
- There are currently 6 registered attendees – so it is time to push for registration



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Adrian Harrell, President Elect/Speaker & Education Chair

Ally Kubarych, Communications Chair

Tracey Merrel, Advisory Director

V. Secretary Report – Donna Gary

- December meeting minutes were reviewed. Motion to approve by Bob D and second by Adrian

VI. Presidents Report – Bob Preston

- Bob P. noted his recent article which was published in the Residential Resource Magazine.
- Bob P. reminded the board that the Chapter Excellence report is coming due soon. Bob D. recommended the incoming President along with the Secretary complete the report as they have access to the required information and historical working knowledge for the upcoming year. Bob P. suggested we form a committee with Adrian, Donna and Bob P.
- The Zoom account has been updated.
- Bob P. requested an updated conference budget from Bob D. They met offline and projected conference cost to be \$50,000.00
- Bob P. suggested that a summary of goals and conference expectations of board members respective to their roles and requested Bob D. to work on this. He noted that our participation on the board adds a stamp of recognition and credibility within our industry.

10:05 am Motion to Adjourn by Adrian, Second by Bob D.



Cal NARPM Board Meeting Minutes

Thursday, July 23, 2020

Zoom Video Meeting 9:00 a.m.

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 - 1. Include Past President as an Executive Officer
 - 2. Reduce total number of Board Members from 9 to 7
 - 3. Eliminate section pertaining to membership and dues

VIII. Committees

- a. Conference Committee – Michael Braddon, Chairman
- b. Communications Committee – Ally Kubarych, Chair
- c. Education/Speaker Committee - TBD

IX. Old Business

- a. The pending decision regarding an “in-person” conference at the Marriott Napa or a virtual event due to the current COVID-19 pandemic was discussed. It was determined to wait until the August meeting to discuss in greater detail after some of the board members have a chance to attend to upcoming virtual events and can provide feedback on the technology used as a platform for the event.

X. New Business – No Updates

XI. Future Meeting Dates – BOD

- a. Thursday, August 20, 2020 @ 11:00 AM

XII. Adjournment – Bob Preston, adjourned at 10:05 am

Cal NARPM Board Meeting Minutes

Thursday, September 17, 2020

Zoom Video Meeting 9:00 a.m.

I. 9:00 am - Call to Order

- a. Present: Bob Preston, Bob Davie, Donna Gary, Mark Scott, Anne Lackey, Ally Kubarych, Adrian Harrell

II. Minutes From Last Meeting and Secretary's Report – Those present from last meeting verbally reviewed and approved.

III. Treasurer's Report – Bob Davie

- Explained financial year report of 7/1/2019-6/30/2020 reflects that the conference was in a deficit at conclusion. This result was anticipated and intentionally planned by the board.
- Account Balances as of 8/31/2020
 - Union Bank - \$40,993.00
 - Pay pal approximately \$7500
- Expenses:
 - \$32.87 – Website maintenance through Elite Venue
 - \$275 – Wave webhosting
 - \$350 – other web expense
 - \$195 – bookkeeping
 - \$60.10 – Word Press annual fee
- Reported Insurance cost for annual premium for 1 million coverage \$941 – board approved

IV. Conference Committee Report

- 2021 Conference theme selected "Embracing Change"
- Communication with Marriott regarding cancellation of event was positive. They will continue to hold the \$5000 deposit
- Conference Date was recommended to be moved to 3/11/20 and 3/12/20 due to original date conflicts with Broker/Owner and Passover
- Discussion ensued regarding registration fees. Prior fees were \$215 for early registration and \$245 after cutoff. National has reduced their registration fee. Bob P suggested we reduce our fee
- Bob P. presented a proposed budget for the conference of approximately 50k
- Bob D. moved that the budget be approved, 2nd by Bob Preston
- Anne Lackey projected \$35,500 income revenue from sponsors and affiliates

- Anne has been in communication with Second Nature regarding partnering with us for planning the event but no formal proposal has been received. It was suggested that perhaps Second Nature could charge \$3500 but receive free sponsorship in lieu of a payment. The figure was based upon an independent quote of \$3000 for a dashboard and \$2000 for technology.
- Adrian initiated discussion as to whether or not we should have certification classes prior to the conference (day before). There were differences of opinion and topic was tabled.
- Adrian presented an idea of holding a virtual event in October. The event would be to educate people on upcoming ballot initiatives. She suggested having both pro and con perspectives in 15 minute increments. Initiatives to cover would be Propositions 5, 19, 21 and 22. In discussion it was revealed that the dates she had in mind had conflicts, so she is going to report further plans at the next meeting.
- Adrian inquired as to whether CalNarpm had a zoom account. It was confirmed that there is not a CalNarpm account.
- Mark Scott moved that we sign up for an account that will accommodate 300 participants for approximately \$250 per year. The motion was seconded by Bob Davies. Bob P. will create account and set up hosts.

V. By Laws update

- Bob P. reported that the By Laws from 2019 in possession by Narpm are unsigned. Bob emailed out two versions to determine which one we would want to ratify.

Meeting Adjourned 10:22



Cal NARPM Board Meeting Minutes

Thursday, December 17, 2020

Zoom Video Meeting 9:00 a.m.

I. 9:00 am - Call to Order

- Present: Bob Preston, Bob Davie, Donna Gary, Anne Lackey, Ally Kubarych, Tracey Merrel, Mark Scott, Adrian Harrell

II. Minutes From 11/19/2020

- Corrections
 - i. New Business- "Grant Application fee" should read "Grant Application"
 - ii. Section VII –"AB 3088 could be" should read "AB 3088 should be" included in topics
 - iii. Correction for name spelling in Section VII to "Tracey"
 - iv. Correction for name spelling to "Mike Dunfee"
 - v. Amended minutes motion to approve by Bob D, Second by Adrian

III. Treasurer's Report – Bob Davie

- Union Bank Statement provided to all. Account balances are as follows:
 - i. Union Bank - \$35,953.00
 - ii. Pay Pal - \$19,515.00
- Bob D. summarized that the upcoming conference is essentially paid for at this point but we do currently have (4) \$99 participants signed up and paid
- Review of Expenses:

Quickbooks – annual fee \$430

Waive Elite (social media account)- \$120

Printing postcards - \$710

Waive Elite web hosting - \$119

- Bob is planning to investigate possibility of changing the Zoom account from "Pro" to a regular account to save money
- Group decided to change to Waive Elite

- Bob P. indicated that CalNarpm has a "box" account. Nobody knew if it was still being used so Bob P. will investigate and see if there is anything of importance in the box that should be retained

IV. Conference Committee – Bob Preston

- Bob P. reviewed the budget for on behalf of the conference committee and noted modification that could be made since there are some line items that are different from typical conference.
 - AV- remove
 - Event Planner – leave at 5k
 - Speaker fee – noted that Adrian knowingly exceeded budget by \$1000 to retain quality speakers
- Bob D. will modify budget and distribute
- Marriot will be returning the \$5,000 they were holding rather than provide something in writing that they were holding the fee
- Bob P. submitted \$500 Grant request to National
- Bob P. is pushing for designation points for attendees at Calnarpm booths
- Bob P. shared that he wrote a "Chapter Spotlight" article which will be in January Narpm issue

V. Communications - Ally

- Ally requested that the agenda be secured and finalized as soon as possible (hopefully before end of year) so website and communications can be updated and distributed
- Bob P. requested that Adrian obtain headshots and bios as soon as possible
- Bob P. shared a form he received from owner/broker conference and suggested we use it as a template for an agreement with speakers and participants
- Anne state that she wants to hold a "best practices" meeting for Gold Sponsors so they will be prepared

VI. Speakers - Adrian

- Adrian reported that the key note speakers will be Bill Benjamin and Jesse Brisendine. The budget was exceeded by \$1000 to secure these quality speakers. She will have a prep session with them to ensure they gear their presentations to California and property management.
- All speaker positions are full with 4 speakers. Adrian will contact them for headshots, bios and topic descriptions. She is working on topics to ensure they are engaging.

- The expert panel has been finalized. One person will be assigned to each break out session. Panelists have agreed to participate.
- 3 of 4 speaker groups are from California. This was intentionally planned by Adrian
- Adrian reviewed details from presenters and topics that have been scheduled
- At the end of each day there will be a "trade show & mixer" where presenters and panelists will be available for further discussions

VII. Discussion

- Group had discussion regarding what is typically covered at the CalNarpm annual meeting. Bob D. shared a typical annual meeting scenario. Suggestions were made as to content that is expected to be included.
- Bob D. suggested CalNarpm create succession planning for positions
- Bob P. brought up that we do not currently have a membership committee or protocol for new members
- Tracey suggested creating a virtual "Welcome Packet" for new members
- Bob D. suggested we create a board position to handle the virtual welcome packet job. Candidate should be someone with a spark who knows what we can offer.
- Discussion ensued as to how we can provide more of a connection between local chapters w/ Calnarpm
- It was suggested by Bob D that chapters have one member who could hold a position at the State level. This idea would likely require a bylaw change at both levels
- Bob P. asked if there is anything preventing us from seeking attendees from outside of California for the conference. Bob D. says that historically there have been about 15 people from outside of California who attend our conferences. It was discussed that Bob P. would invite chapters in nearby states eg. Oregon and Nevada but avoid extending to states further away. All agreed for various reasons.

10.10 am Motion to adjourn by Bob P. and approved by all

CAL-NARPM OPERATING BUDGET - 2020-2021 (REVISED)**INCOME**

Attendees	\$	30,000.00
Exhibitors	\$	35,000.00
Grant	\$	500.00
Education Classes (estimate)	\$	-
Total Income	\$	65,500.00

EXPENSES

Hotel Fee	Initial Deposit	\$	-
Hotel Fee	2nd Deposit	\$	-
Hotel Fee	3rd Deposit	\$	-
Hotel Fee	Final Deposit	\$	-
Hotel Fee	Final Reconciliation	\$	-
Total Hotel Fees		\$	-

Event Planner	\$	15,000.00
Total Event Planner Fees	\$	15,000.00

A/V Fees	Initial Deposit	\$	-
A/V Fees	Final Payment	\$	-
Tech Production		\$	7,500.00
Total A/V Fees		\$	7,500.00

Speakers Fee	Person 1	\$	4,000.00
Speakers fee	Person 2	\$	3,000.00
Speakers Fee	Person 3	\$	3,000.00
Total Speaker Fees		\$	10,000.00

Printing Fees	Printing/Mailing STD	\$	1,200.00
Printing Fees	Vendor Postcard	\$	2,500.00
Printing Fees	Attendee Postcard	\$	1,500.00
Misc. Printing Fees		\$	500.00
Total Printing Fees		\$	5,700.00

Misc Fees	Printing reimbursement	\$	550.00
Misc. Fees	Signage Printing/lanyard	\$	-
Misc. Fees	Gifts reimbursement	\$	750.00
Misc. Fees	Charity Donation	\$	1,200.00
Total Misc. Fees		\$	2,500.00

Accounting Fees	\$	1,500.00
Marketing Fees	\$	5,000.00

Constant Contact	\$	500.00
Mail Chimp	\$	550.00
Software	\$	550.00
Total Operational Fees	\$	8,100.00
 Total Projected Annual Expenses	 \$	 48,800.00
 Net Profit	 \$	 16,700.00



Cal NARPM Board Meeting Minutes

Thursday, November 19, 2020

Zoom Video Meeting 9:00 a.m.

I. 9:00 am - Call to Order

- a. Present: Bob Preston, Bob Davie, Donna Gary, Anne Lackey, Ally Kubarych, Adrian Harrell, AJ Shepherd, Tracey Merrel, Mark Scott

II. Welcome –

- a. Bob Preston welcomed AJ Shepherd and Tracey Merrel to the meeting

III. Minutes From 10/17/2020 Meeting and Secretary's Report – Reviewed and corrections requested: Spelling of name for Mike Dunfeem, Adrian finalized the call for speakers rather than finalized speakers (VII), Convention Committee report was made by Bob Preston (VI)

Motion to accept as corrected approved unanimously

IV. Treasurer's Report – Bob Davie

- Copy of bank statement was provided
- Currently approximately \$38,000 bank balance.
- Expenses reviewed:
 - Mail Chimp rate increased slightly over prior invoices
 - Wave Elite and social media \$275 and \$350 respectively
 - Constant contact \$95
- Zoom bill \$191.68 which was high because we needed the ability for a larger number of users. This will be evaluated as to whether it may be prudent to reduce service. AJ suggested looking at Second Nature for similar service.
- Bob D. recommends retention of the \$38,000 balance as seed funds for this account.
- Income:
 - We now have 3 paid conference attendees.
- Bob reports everything is up to date and paid current. Bob will provide a quarterly report in January.
- Bob D. changed owner of the Constant contact to Bob Preston
- Adrian inquired as to whether Executive team is required to register and pay for conference. It was confirmed that it is the expectation everyone pays, and credits may be granted per discretion of President and Treasurer. AJ suggested all pay and then reimbursement be provided if determined appropriate.

V. President's Report – Bob Preston

- Bob P. reported the bylaws were submitted to National and he received a confirmation from Gail that we "are fine".
- The updated bylaws will soon be available on National Website
- Bob reported that at the Leadership training it was announced that there may be changes next year made by National that could require bylaw updates again.

VI. Convention Committee Report – Bob & Anne Lackey

- Laura, Mike, Bob Preston and Anne Lackey worked together to establish a conference agenda.
- Bob presented the sample agenda and reviewed schedule and content.
- Bob reported that Adrian is working to fill speaker slots
- Adrian requested to be added to meetings to help her obtain a better understanding of the process
- Bob requested feedback from meeting attendees regarding an "adopt a charity" for this event only. He suggested a possible recipient might be the California Wildfire Relief Fund.
- Bob Davies reminded the group that historically, CalNarpm has donated to the National charity each year therefore it would need to be decided if we would have an event "adopt a charity" in addition to making the National donation or have one in lieu of the other.
- Anne reported we have collected \$21,000 in revenue thus far
- Anne reported that Second Nature agreed to an "in kind sponsorship"
- Anne noted that obtaining affiliate support has been challenging this year. She is filling sponsorships and reviewed the current status of partner and virtual booth partners who have paid and confirmed.
- Anne stated that she is hoping for 5 more Gold sponsors (currently has 5) and for a total of 10 Silver sponsors

VII. Speaker/Education Committee - Adrian

- Adrian reported that the call for speakers has had a lot of interest for Key note speakers. She presented her spreadsheet which included speaker name, speaker fee and their preferred topics.
- It was noted that a number of topics appeared to be non-property management related.
- Adrian will be meeting with Mike 11/20/20 to narrow down the list.
- Bob P. inquired as to the possibility of the topics and presentations being adapted to pertain specifically to California.



2020-2021 CALNARPM Board of Directors

Bob Preston, President

Mark Scott, Past President

Donna Gary, Secretary

Bob Davie, Treasurer

Anne Lackey, Affiliate Director

Adrian Harrell, President Elect/Speaker & Education Chair

Ally Kubarych, Communications Chair

Tracey Merrel, Advisory Director

- Tracey stated that review of AB 3088 should be included. She noted the need due to Covid-19 eviction requirements are still evolving and changing.
- Adrian stated that she feels we are at a good position at this point to firm up the selections. This will be reviewed and discussed at the 12/1 committee meeting and the speakers and agenda will be determined so the information can be available for advertising. She feels that attendees will prefer to review topics to determine their interest in attending.
- Bob P. requested that the confirmed selections be available for the next Board meeting.

VIII. New Business – Bob P.

- Bob stated that it would be a good idea to establish a Legislative Committee and should consider this idea.
- Bob P. discovered that a \$500 Grant application fee is due at the end of November
- Bob P. suggested we might want to consider hosting an educational event which can be a source of revenue. He noted that National will pay \$250 toward supporting the event.
- Bob D. said we have \$5000 with Napa Valley Marriot due to the event cancellation and we should request something in writing confirming they are holding the funds.

Meeting Adjourned 10:19 – Motioned by Bob Preston and approved unanimously

Next Meeting December 17, 2020 9:00am