

Bylaws of
The Santa Clara County Chapter of
The National Association of Residential Property Managers
Updated January 2021

ARTICLE I: Name, Purposes, Powers and Definitions

Section A: Name

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

Section B: Purpose

The purposes for which the organization is established are to:

1. Establish a permanent trade association in the residential property management industry in the Santa Clara County.
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 Santa Clara County and surrounding cities.

Section C: Powers

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

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

Section D: This chapter's geographical definition shall be: Santa Clara County, California.

ARTICLE II: Membership

Professional, Associate, Support Staff, Affiliate Member, Honorary Members, and Company Membership

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 B: Associate Member

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

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

The Chapter shall not recognize all NARPM® National Affiliate Members as Affiliate Members of this Chapter.

Section E: Honorary Member

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

Section F: Life Member

Life members shall be all national past Presidents of NARPM®. Life membership will begin as the President's term is completed. Dues will be waived for Life members. Other members who qualify may apply for Life Member as outlined in the national bylaws and complete the approved application.

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

- All Past Presidents shall be deemed Life Professional Members of the Association
- Shall be bestowed upon individuals who have retired from the property management business and, in the opinion of the Board of Directors, have rendered, or continue to render, distinguished service to the Association or the property management profession.

An application to the NARPM® National Board of Director must be approved in order to hold this membership type.

Section G: Application by Professional, Associate, or 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. 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 the Santa Clara County Chapter and the National Association, if applicable. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
 - b. Affiliate member may resign at any time by forwarding a letter stating such intent to the Chapter. The letter shall indicate the date on which the resignation is effective. No refund of chapter or national association dues shall be made for any reason.
2. Failure to Pay Obligations: Membership shall terminate automatically when a member fails to pay annual Chapter dues within 75 days of the due date. Members may file a letter of appeal to the executive committee should an extension be needed to pay obligation.
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: Transferring in a Company membership:

The use of Company membership will enable the transfer of memberships to other people in their company. In order to transfer membership, proof of termination from the licensing division, showing evidence that the person has left the firm, is required. For Support Staff, or in states where licensing is not required, other proof of termination must be submitted.

Section D: 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. Request through the normal application procedures, if the resignation occurred beyond the current fiscal year.

ARTICLE IV: Executive Committee/Board of Directors

Section A: Responsibilities

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

1. Establishing and implementing an organization framework for the chapter.
2. 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.

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 6 officers as follows:

1. President: The president shall:
 - a. Serve as the chief executive officer of the chapter.
 - b. Preside at all meetings of the chapter.
 - c. Act as an alternate signatory for funds withdrawn from the chapter account(s).
 - d. Sign all legal documents.

- e. Undertake responsibility for such other activities as deemed appropriate by the committee.
 - f. Shall ensure the completion of all documentation required by the National Association.
 - g. Serve a term of 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 with the beginning of the calendar year.
 - g. Must be a Professional Member of the Chapter.
 - h. Notify all chapter members of upcoming meetings
 - i. Coordinate speakers and lecturers that are relevant to the residential industry for chapter meetings.
 - j. Undertake responsibility for such other activities as deemed appropriate by the committee.
 - k. Oversee the submission of Chapter reports including Chapter Excellence submission
 - l. Must be back up for be in attendance at annual Board Leadership Training offered by the National Association of Residential Property Managers if the President is unable to attend.
3. Secretary: The secretary shall:
- a. Maintain current chapter membership records to coincide with the national 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 with the beginning of the calendar year.
 - 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 with the beginning of the calendar year.
 - i. Must be a Professional Member of the Chapter.
5. Past President
- a. Shall serve as Chairman of the Nominating Committee
 - b. Undertake responsibilities as assigned by the President

- c. Serve a term of one year commencing with the beginning of the calendar year.
- 6. 1 or 2 Directors at Large, at the President's Discretion
 - a. To act as directed by the President
 - b. To assist with other committee needs
 - c. To assist with Special Events
 - d. To represent NARPM Santa Clara County when requested

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 election. 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 signed by five percent (5%) of the professional chapter members.
- 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 Santa Clara County Chapter Executive Committee and presented to the membership for final vote.
- 3. Uncontested Offices: The presiding authority shall identify to the membership 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.
- 6. The Chapter shall allow nominations from the floor of the chapter meeting. If electronic elections take place write-In Candidates must be solicited. Write-in candidates shall be

added to the slate if said candidate's names are presented in writing to the Nominating Committee thirty (30) days before the election, accompanied by the signatures of ten percent (10%) of the professional members in good standing recommending the candidates for a director or for an officer 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, unless stated otherwise in these bylaws.

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. No longer is eligible for membership in the chapter or the national association.
3. No longer is capable of fulfilling duties of the office involved.

Section F: Filling a Vacated Office

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

1. When: When more than three (3) calendar months remain before the next election at which 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.
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 sub-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 sub-committees according to the needs of the chapter.

ARTICLE VIII: Code of Ethics & Standards of Professionalism.

Acknowledgment and Enforcement

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

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

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

Section A. Acknowledgment: Each applicant for membership in the Association shall read and be familiar with the Association Code of Ethics and Standards of Professionalism. Continual adherence to

the Code is mandatory for membership in the Association. Professional Members shall have successfully completed a course of instruction on the NARPM® Code of Ethics.

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

Section C: Chapter Charter

A Chapter Charter is granted by the National Association of Residential Property Managers, Inc, 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 a calendar year.

Section B: Chapter Dues

- A. 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 January 1 of each year.
 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 Santa Clara County Chapter Executive Committee or Board of Directors.

Section E: Non-Binding

The chapter shall not have any authority to financially obligate or bind the National Association of Residential Property Managers, Inc., 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, Inc., 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, Inc., 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 effect of the remainder of these bylaws.

Section B: Waiver

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

Section C: Hold Harmless and Indemnify

The chapter shall hold harmless and indemnify members of the executive committee, officer(s), 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 California state law, Chapter shall notify the National Association of said amendments, but no further action will be required.

Section E. Sexual Harassment

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

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

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

Section E: Dissolution

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



Confirmation

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

- **Organization Name:** THE SANTA CLARA CHAPTER OF NARPM
- **EIN:** 770342116
- **Tax Year:** 2021
- **Tax Year Start Date:** 01-01-2021
- **Tax Year End Date:** 12-31-2021
- **Submission ID:** 10065520220615305887
- **Filing Status Date:** 03-02-2022
- **Filing Status:** Pending

Note: [Print](#) a copy of this filing for your records. Once you leave this page, you will not be able to do so.

MANAGE FORM 990-N SUBMISSIONS

Confirmation

Print this page for your records. The Confirmation Number below is proof that you successfully filed your 199N e-Postcard.

We received your 199N e-Postcard on 3/2/2022 8:39:25 AM.

Confirmation Number: 205933206110

Entity ID: 2059332
Entity Name: THE SANTA CLARA COUNTY
CHAPTER OF NARPM

Account Period Information

Account Period Beginning: 1/1/2021
Account Period Ending: 12/31/2021

This is not your entity's first year in business.

Your entity has not terminated or gone out of business.

Your entity has not changed the account period.

Gross Receipts: \$3621

This is not an amended return.

An IRS Form 1023/1024 is not pending.

Entity Information

FEIN: 770342116
Doing Business As:
Website Address:

Entity's Mailing Address

PO Box 5172
Brad Abbott
San Jose CA 95150

Principal Officer's Information

Brad Abbott
PO Box 5172
Brad Abbott
San Jose CA 95150

Contact Information

Name: Dyann Shepard CPA
Phone: 8056101445

After we process your 199N e-Postcard, you may receive a bill if the three year gross receipt average is greater than the amount allowed for filing a 199N e-Postcard.

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Accrual Basis

NARPM Santa Clara County
Profit & Loss
January through December 2021

	<u>Jan - Dec 21</u>
Income	
Affiliate Dues - Annual	5,677.75
Education	180.75
Member Dues	8,066.00
Summer Fundraiser Income	2,026.71
Total Income	<u>15,951.21</u>
Gross Profit	15,951.21
Expense	
Advertising	268.08
Catering/Room Rental	1,368.26
Donations	1,200.00
Merchant Fees	64.99
Other Expenses	972.28
Postage/Printing	185.48
Professional - Legal/Acctng	250.00
Sponsorship	-450.00
Summer Fundraiser Expense	909.63
Website Expense	1,801.98
Total Expense	<u>6,570.70</u>
Net Income	<u><u>9,380.51</u></u>

NARPM Santa Clara County

Budget for 2022

		Notes
Income:		
Member Dues - Annual	\$6,440	46 members @ \$140 each (Based on 2020 Roster)
Affiliate Dues - Annual	\$3,465	35 affiliates @ \$99 each (Based on 2020 Roster)
50/50 Drawing	\$2,700	Estimate from 2018 income
Education	\$750	2018 Class income
Holiday Party	\$5,625	\$2125 - 90 guests (35 @\$50 55 @ \$25), \$400 Special Raffle (iPad mini), \$1500 for 50/50 Raffle, \$600 (\$300 per Photo Booth Sponsor)
Grants from NARPM National	\$2,380	\$630 Member Retention, \$500 Advertising Grant (Available), \$500 Education Grant, \$500 Speaker Travel Grant, \$250 Leadership Training Grant
Total Income	\$21,360	
Expense:		
50/50 Drawing	\$1,350	1/2 of estimated income
Advertising	\$562	\$252 (\$26 per month) MailChimp, \$250 misc supplies/flyers
Awards/Scholarships	\$200	4 \$50 Amex Gift Cards for 1 Affiliate Meeting
Bank Charges		Bank account is free
Board of Directors	\$3,850	\$2,000 - Pres. & Pres Elect Sponsorship to attend Natl Conv @ \$1,000 each; \$200 gift for Holiday Party for outgoing President, \$1200 BOD Dinner, \$800 End of Year BoD gifts, \$100 President Budget
Catering/Room Rental	\$3,990	\$570 average per meeting 7 meetings,
Donations	\$2,000	to be dispersed to charities at the discretion of the Board
Education	\$750	2018 Education Expenses
Fundraiser Annual Expense	\$500	Volunteer dinner
Holiday Party Expense	\$7,140	\$1600 Casino; 90 dinners @ \$41=\$3690; Raffle Giveaway (iPad mini) \$400; \$750 for 50/50 Raffle; \$600 Photo Booth; \$100 decorations
Merchant Fees	\$300	Paypal, Square, Etc. (Estimate Based on 2018 expense)
Professional - Legal/Acctng	\$175	Tax Return Preparation + Tax
Website hosting	\$140	GoDaddy.com
Post office box rental	\$134	
Total Expense	\$21,091	
Net Income	\$269	

NARPM Santa Clara County Budget for 2021

		Notes
Income:		
Member Dues - Annual	\$6,440	46 members @ \$140 each (Based on 2020 Roster)
Affiliate Dues - Annual	\$2,704	35 affiliates @ \$295 each (Based on 2020 Roster) less \$7621 credit for 2020 dues (31 members @ \$245.83
50/50 Drawing	\$2,700	Estimate from 2018 income
Education	\$750	2018 Class income
Holiday Party	\$5,625	\$2125 - 90 guests (35 @\$50 55 @ \$25), \$400 Special Raffle (iPad mini), \$1500 for 50/50 Raffle, \$600 (\$300 per Photo Booth Sponsor)
Grants from NARPM National	\$2,380	\$630 Member Retention, \$500 Advertising Grant (Available), \$500 Education Grant, \$500 Speaker Travel Grant, \$250 Leadership Training Grant
Total Income	\$20,599	
Expense:		
50/50 Drawing	\$1,350	1/2 of estimated income
Advertising	\$562	\$252 (\$26 per month) MailChimp, \$250 misc supplies/flyers
Awards/Scholarships	\$200	4 \$50 Amex Gift Cards for 1 Affiliate Meeting
Affiliate Day Shred Truck Rental	\$250	\$250 for 1 hour rental
Bank Charges		Bank account is free
Board of Directors	\$4,300	\$2,000 - Pres. & Pres Elect Sponsorship to attend Natl Conv @ \$1,000 each; \$200 gift for Holiday Party for outgoing President, \$1200 BOD Dinner, \$800 End of Year BoD gifts, \$100 President Budget
Catering/Room Rental	\$7,860	\$750 average per meeting x 10 meetings, \$360 Adobe Lodge Fee
Donations	\$2,000	to be dispersed to charities at the discretion of the Board
Education	\$750	2018 Education Expenses
Fundraiser Annual Expense	\$800	Volunteer dinner
Holiday Party Expense	\$7,140	\$1600 Casino; 90 dinners @ \$41=\$3690; Raffle Giveaway (iPad mini) \$400; \$750 for 50/50 Raffle; \$600 Photo Booth; \$100 decorations
Merchant Fees	\$300	Paypal, Square, Etc. (Estimate Based on 2018 expense)
Professional - Legal/Acctng	\$175	Tax Return Preparation + Tax
Professional - Speakers	\$1,400	2 speakers @ \$250 each + \$50 Gift Card Per Meeting @ 8 Meetings, \$500 Out-of-Town Speaker Travel Expense
Scholarship	\$450	\$150 Designation Reimbursements (estimated 3)
Supplies	\$250	Plaques/Decorations/Etc
Website hosting	\$140	GoDaddy.com
Post office box rental	\$92	
Affiliate dues donation	\$983	4 member dues to charity
Total Expense	\$29,002	
Net Income	-\$8,403	
Changes to budget:		Removed website maintenace (\$1440)
		Removed member referral gift cards (\$50)
		Adjusted Merchant fees to \$300
		Adjusted member/affiliate income based on 2020 numbers
Discussion Topics:		

Sean McCarthy

From: Lisa Goodman <Lisa@SilverCreekValleyProperties.com>
Sent: Thursday, January 14, 2021 4:34 PM
To: Sean McCarthy
Subject: Fwd: NARPM SCC Meeting Reminder January 21st 2021 ✨

Here's the e-mail (below). I see you are on the contacts for mailchimp. Maybe check spam?

—Lisa Goodman, MPM®, RMP®, CalDRE#01872426, Owner, Realtor®, Property Manager
—Silver Creek Valley Properties - BUY, SELL, RENT
—Hours of Operation: Monday-Friday from 9am-6pm; Weekends for emergency calls or by appointment

*** Designations/Certifications:**

Certified in Property Management from CAR (California Association of Realtors®)

Master Property Manager (MPM®) from NARPM®

Residential Management Professional (RMP®) from NARPM®

Past President of Santa Clara County Chapter of NARPM®

NARPM = National Association of Residential Property Managers)



SILVER CREEK VALLEY
Properties
BUY • SELL • RENT

LISA GOODMAN, OWNER, REALTOR®, PROPERTY MANAGER
P: 408.673.SCVLP C: 408.771.8472 F: 408.471.8472
LISA@SILVERCREEKVALLEYPROPERTIES.COM
WWW.SILVERCREEKVALLEYPROPERTIES.COM
5655 SILVER CREEK VALLEY RD. #717
SAN JOSE, CA 95138

REALTOR® **NARPM®** **PMG**
National Association of Residential Property Managers PROPERTY MANAGEMENT CERTIFICATION

The finest compliment I can receive is an
to friends or colleagues from an apprec

Begin forwarded message:

From: NARPM Santa Clara County <info@narpmssc.com>
Subject: NARPM SCC Meeting Reminder January 21st 2021 ✨
Date: January 13, 2021 at 2:55:17 PM PST
To: Brad Bonnifield <info@narpmssc.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>



Save the Date: ZOOM Meeting Thursday, January 21st, 2021, at 9am

Add event to calendar



Setting the Stage for Your Best Year Ever!

- * Choosing between profits and growth in 2021
- * Where to focus to maximize growth and profits
- * How to break the bad habits that keep you and your team stuck



Speaker Jordan Muela is the co-founder of LeadSimple, ProfitCoach, RentScale, and host of the profitable property management podcast. He's worked in the property management industry for over a decade and has a unique perspective on what really drives success vs under-performance. He lives in Austin, TX with his wife and three girls.

*Jorda Muela, 512-900-5498, jordan@leadsimple.com

Click here for the Zoom Link on January 21st at 9am!

SPONSOR OF THE MONTH

Mike Amdal with Citra Pest Control

408-691-3444

mikeamdal@gmail.com



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The Board of Directors and Leadership Team meet via Zoom every 1st Thursday of the month. Everyone is welcome to come share their ideas! Please RSVP via e-mail to our current NARPM SCC President, Sean McCarthy (sean@goldenstatepropertymanagement.com) at least 24 hours in advance.



NEXT MONTH'S MEETING (February 18th)

Allison Disarro, Senior VP of Seacoast Commerce Bank will be speaking about the common misconceptions, risks, and red flags of an improper Trust account set-up. Don't miss it!

*Allison Disarro, 619-988-6708, adisarro@sccombank.com

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Sean McCarthy







From: NARPM Santa Clara County <info@narpmscc.com>
Sent: Tuesday, April 13, 2021 11:04 PM
To: Sean McCarthy
Subject: 📌 NARPM SCC Meeting Reminder THIS THURSDAY, April 15th 2021, at 12pm - Mark Your Calendar!





Save the Date: ZOOM Meeting Thursday, 4-15-21, at 12pm

Click your specific system to auto-add this even to your calendar!



SPEAKER TOPIC

Enhancing your Marketing Plan with Online Leads



Speaker Rhianna Campbell is a 17-year real estate veteran, founding member, and now President of the District of Columbia chapter of NARPM. After building, growing, and then selling a multimillion dollar real estate business, she started Proper Planning LLC, a consultancy assisting property management broker-owners to build and grow their companies. During this meeting she will speak about:

- How to use **Software & Online sources** to find leads for your real estate business.
- How to define your search criteria to identify **Leads** that need your services.

- How to capture the data you need to launch a **Full Force** marketing attack!
- How to put together a **marketing campaign** so that you can stay **top-of-mind** and be the first call when the prospect is ready to make a move.

*Rhianna Campbell, Founder & CEO, Proper Planning LLC
202-888-2731, rhianna@properplanning.realestate

Click here for the Zoom Link on April 15th, at 12pm!

SPONSOR OF THE MONTH

Maria Neumann

Water & Fire Damage Recovery

510-394-0980

<https://waterdamagerecovery.net>



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Special thanks to our Zoom Moderator, [Second Nature!](#)



The Board of Directors and Leadership Team meet via Zoom every 1st Thursday of the month at 4pm.
Everyone is welcome to come share their ideas! Please RSVP via e-mail to our current NARPM SCC
President, Sean McCarthy (sean@goldenstatepropertymanagement.com) at least 24 hours in advance.

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Sean McCarthy







From: NARPM Santa Clara County <info@narpmssc.com>
Sent: Wednesday, May 19, 2021 4:00 PM
To: Sean McCarthy
Subject: 📌 NARPM SCC Meeting Reminder TOMORROW, May 20th 2021, at 12pm - Mark Your Calendar!



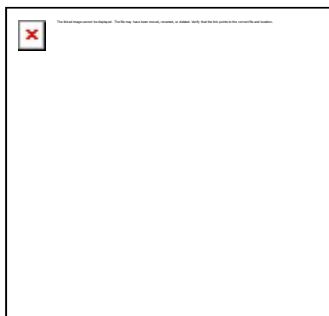


Save the Date: ZOOM Meeting Thursday, 5-20-21, at 12pm

Click your specific system to auto-add this event to your calendar!



SPEAKER TOPIC **Legal Q & A**



For over 26 years, rental housing providers have relied on Daniel Bornstein to cauterize risk, realize the full potential of their investment property, and power through unique challenges inherent with owning and operating a real estate business. Read [More](#).

*Daniel Bornstein, Esq., Bornstein Law
415-409-7611, daniel@bornstein.law

Click here for the Zoom Link on May 20th, at 12pm!

SPONSOR OF THE MONTH

Marcia Shae

Legal Shield

408-401-2862

marciashea777@gmail.com



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--NARPM® has a library of helpful webinars listed [HERE](#).

--There are many Facebook Groups you can join to connect/ask questions of colleagues. Here are some of them: [CA PM's/Brokers](#), [Residential PM Broker Only](#), and many more!

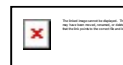
--See other NARPM® benefits [HERE](#).

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Special thanks to our Zoom Moderator, [Second Nature](#)!



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Sean McCarthy

From: NARPM Santa Clara County <info@narpmssc.com>
Sent: Wednesday, July 14, 2021 3:00 PM
To: Sean McCarthy
Subject: 📌 NARPM SCC Meeting Reminder TOMORROW, July 15th 2021, at 12pm - Mark Your Calendar!



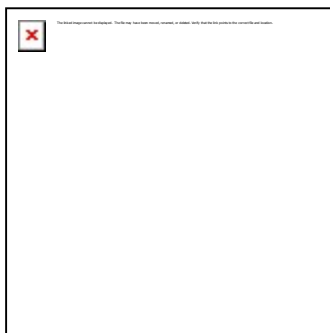
Save the Date: ZOOM Meeting Thursday, 7-15-21, at 12pm

Click your specific system to auto-add this event to your calendar!



SPEAKER TOPIC

KPIs = Key Performance Indicators (Metrics)



Daniel Craig, CEO of ProfitCoach, provides property management entrepreneurs with a degree of clarity and effectiveness in their business by helping them identify the key profit drivers in their business. You manage properties like a pro and you might even be growing, but are you tracking the critical KPI's that will dictate whether or not you hit your long term growth goals? They turn your data into powerful insights that put you in the driver seat of your business future. It all starts with a financial audit to understand exactly where you stand TODAY, and then a roadmapping session to define where you want to be Tomorrow.

Daniel Craig, CEO of Profit Coach
509-944-0171, daniel@pmpfitcoach.com; https://www.pmpfitcoach.com

Click here for the Zoom Link on July 15th, at 12pm!

SPONSOR OF THE MONTH

Mark Wood

ServPro of SW San Jose

408-858-8820

servproofswsanjose.com

Don't miss the raffle prizes!



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Sean McCarthy







From: NARPM Santa Clara County <info@narpmccc.com>
Sent: Wednesday, July 21, 2021 12:33 PM
To: Sean McCarthy
Subject: 🕒 NARPM SCC 2021 Summer Charity BBQ Event! Save the Date 8-14-21 from 2-6pm.





Save the Date: NARPM SCC Summer Charity BBQ August 14th, 2-6p!

Click your specific system to auto-add this event to your calendar!



Where: Vasona Park (Circle Area) - See Map Below

When: Saturday, August 14th, 2021, From 2-6pm

What to Bring: \$50 Raffle Gift per Company

Cost: \$35/ticket (12 and under are free)

Bring your family and join your NARPM friends for some fun in the sun!

Food, drinks, and raffle prizes!

[Click Here to Purchase Tickets!](#)


BENEFITING SUNDAY FRIENDS


Sunday Friends empowers families
to break the generational cycle of
poverty by fostering positive



development in children while
educating and guiding parents to
support their children's life success.

This field is required.

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Sean McCarthy


From: Marcia Shea <marciashea777@gmail.com>
Sent: Wednesday, October 20, 2021 4:32 PM
To: NARPM Santa Clara County
Subject: Re: 📢 NARPM SCC Meeting STARTS IN 30 MINUTES

Is there a meeting tomorrow, October 21st? I have someone to invite.

Marcia Shea







On Thu, Sep 16, 2021 at 11:29 AM NARPM Santa Clara County <info@narpmscc.com> wrote:





Save the Date: ZOOM Meeting Thursday, 9-16-21, at 12pm

Click your specific system to auto-add this event to your calendar!



SPEAKER TOPIC **EVICITION MORATORIUM**



Click [HERE](#) for a helpful download from Rothbard Law regarding CTRA AB 832 Recovery Period!

Steve Naumchik, with Law Offices of Todd Rothbard, will be speaking about the Eviction Moratorium, and the new notices that will need to be sent out to tenants who owe back rent.

Steve Naumchik has handled thousands of commercial and residential unlawful detainer actions, involving issues ranging from nonpayment of rent to nuisance and illegal activity. His litigation experience in this arena consists of ongoing law and motion practice, settlement negotiations and trials, both bench and jury trials. Mr.

Naumchik regularly serves as a speaker at seminars
with respect to Landlord/Tenant law.

Steve Naumchik, Lawyer at Law Offices of Todd Rothbard
408-244-4200, <https://toddrothbardlaw.com>

Click here for the Zoom Link on September 16th, at 12pm!

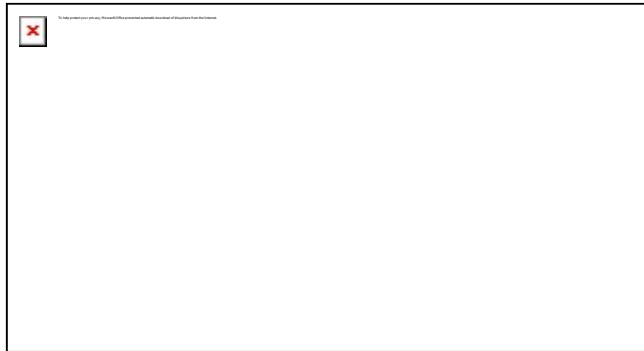
SPONSOR of the MONTH

Robert Russell

A Clean Gutter

408-476-7100

acleangutter@gmail.com



Don't miss the raffle drawing at the end of the meeting!

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--
Marcia Shea
LegalShield and IDShield
Independent Associate - Director
Small Business, Group Specialist & CDLP Certified
marciashea.ladiesofjustice.com
marciashea.wearelegalshield.com
Canada: marciashea.wearelegalshield.ca
Spanish: marciashea.somoslegalshield.com
(408) 401-2862

Sean McCarthy

From: Lisa Goodman <Lisa@SilverCreekValleyProperties.com>
Sent: Tuesday, November 16, 2021 10:33 PM
To: Sean McCarthy
Subject: Fwd: 📌 NARPM SCC Meeting Reminder, November 18th 2021, at 12pm

—Lisa Goodman, MPM®, RMP®, CalDRE#01872426, Owner, Realtor®, Property Manager
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* Designations/Certifications:

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Past President of Santa Clara County Chapter of NARPM®

NARPM = National Association of Residential Property Managers)



LISA GOODMAN, OWNER, REALTOR®, PROPERTY MANAGER
P: 408.673.SCVLP C: 408.771.8472 F: 408.471.8472
LISA@SILVERCREEKVALLEYPROPERTIES.COM
WWW.SILVERCREEKVALLEYPROPERTIES.COM
5655 SILVER CREEK VALLEY RD. #717
SAN JOSE, CA 95138

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National Association of Residential Property Managers PROPERTY MANAGEMENT CERTIFICATION

*The finest compliment I can receive is an
to friends or colleagues from an apprec*

Begin forwarded message:

From: NARPM Santa Clara County <info@narpmssc.com>
Subject: 📌 NARPM SCC Meeting Reminder, November 18th 2021, at 12pm
Date: November 16, 2021 at 10:31:16 PM PST
To: Lisa Fairlie <lisa@silvercreekvalleyproperties.com>
Reply-To: NARPM Santa Clara County <info@narpmssc.com>



Save the Date: ZOOM Meeting November 18th, at 12pm

Click your specific system to auto-add this event to your calendar!



SPEAKER TOPIC

CALL TIME OUT!

This presentation will take the student into the world of handling client demands, tenant requests, and vendor needs with confidence. A simple five step process delivers the tools needed to improve profitability, customer service, and positive attitudes. Attendees will learn simple yet impactful principles they can begin implementing right away.

- Define your reputation to control and mitigate conflict
- Five essential strategies to reduce the number of interruptions and demands on your time
- A proven step-by-step on-boarding process to elevate trust with new clients, vendors, and tenants
- The power of non-verbal and intentional communication to maximize long term relationships and profitability
- Valuable takeaways - Tools & Checklists for easy implementation to increase efficiency and revenue right away

Kellie Tollifson, MPM® RMP® is Executive VP and Co-Founder of T-Square Properties in the Greater Seattle area. Kellie began her 27-year career in Property Management as a landlord managing her own investment properties. After developing systems and processes that answered needs in the marketplace for high quality, tech driven, and cost-effective property management, she has grown T-Square Properties to over 570 doors and 92 Homeowner Associations.

Kellie holds a bachelor's degree in Behavioral Science from San Jose State University and is has served as the 2020 President of NARPM® and is currently serving as the Immediate Past President. Kellie is also a Certified Continuing Education Real Estate Instructor for the State of Washington and a National Instructor for NARPM®.

Click here for the Zoom Link on November 18th, at 12pm!

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NARPM - SANTA CLARA COUNTY CHAPTER BOARD of DIRECTORS

Thursday January 5, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present Sean McCarthy (President), David Hunt (Past President), Sean McCarthy (President-Elect, Brad Bonnifield (/Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair (Legislative - State/National News), Brad Bonnifield (Web-site Chair), Sean McCarthy (Grant Chair), Nancy Penaloza (Communication Co-Chair)

Executive Committee /Leadership Team Members Absent: Sandy Adams, Bob Basso

Meeting called to order at: 5:05 PM

Approval of Minutes – November 2020 Meeting and Planning Motioned approval as written, Seconded, Motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 5 Free Members: 2 Staff Members: 2
- New Members: 0 New Affiliates: 1
- Paid Affiliates: 17 Free non-profit Affiliates: 4
- Bank balance: \$27,558.87 as of 12/31/20

President's Notes:

- How to do induction over zoom
- Need president elect
- Speaker schedule
- Education with other chapters to generate money for chapter
- Start doing meetings at regular time in mornings.

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

No items to report

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

No items to report

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- March 22nd – Advanced Risk Management
- August 11th – Developing Rewarding Owner Relationships

Website: (Brad Bonnifield Chair * Rob Collins Vice-Chair)

- Updates
- Website update –
 - Board meetings posted on calendar (once we get back on regular schedule)

Grants: (Sean McCarthy Chair * Joi Walker Vice-Chair)

Key-Speaker Schedule:

- January - Jordan Muela (Kicking 2021 off on right foot)
- February - Allison Desario (Banking)
- March – Brian Chong (Taxes)
- April –
- May – Servando Sandoval (Fair Housing)
- June -
- July – Hopefully BBQ
- August – Kelly Tollifson
- September -
- October -
- November -
- December – Christmas Party

Potential Speakers:

- Todd Ostridge – Auxiliary Fees
- Mark Nelson – How to invest in real estate outside CA

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS Meeting
February 4, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past-President), Brad Bonnifield (/Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: Lisa Goodman

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), None (Co-Membership & Social Media Chair), Sean McCarthy (Grant Chair).

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Nancy Penaloza (Communication Co-Chair)

Meeting called to order at: 4:07 PM.

Approval of Minutes from January - Motioned approval as written, Seconded, Motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 33 Free Members: 2 Staff Members: 2
- New Members: 0 New Affiliates: 1
- Paid Affiliates: 27 Free non-profit Affiliates: 4
- Bank balance: \$33,855.03

President's Notes:

- Need president elect
- Speaker schedule
- Education with other chapters to generate money for chapter

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

- Sponsors for the next 2 meetings are selected

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- No report

Education: (Andrea Caldwell Chair * Brad Bonnifield Vice-Chair)

- March 22nd – Advanced Risk Management
- August 11th – Developing Rewarding Owner Relationships

Website: (Brad Bonnifield Chair * Rob Collins Vice-Chair)

- Updates
 - Website update – Board meetings posted on calendar (once back on regular schedule)

Grants: (Joi Walker Chair)

Key-Speaker Schedule:

- January - Jordan Muela (Kicking 2021 off on right foot)
- February - Allison Desario (Banking)
- March – Brian Chong (Taxes)
- April –
- May – Servando Sandoval (Fair Housing)
- June – Todd Orscheid
- July – Hopefully BBQ
- August – Kelly Tollifson
- September -
- October -
- November -
- December – Christmas Party

Potential Speakers:

- Todd Ostridge – Auxiliary Fees
- Mark Nelson – How to invest in real estate outside CA
- Chrysztyna Rowek – Because she’s awesome
- David Park – Trust Attorney

Meeting adjourned at 4:46 at

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday March 4, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members: Sean McCarthy (President), David Hunt (Past President), Brad Bonnifield (/Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), Joi Walker (Grant Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Nancy Penaloza

Meeting called to order at: 4:10 PM

Approval of Minutes – Motioned approval as written, Seconded, motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 36
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 32
- Free non-profit Affiliates: 4
- Bank balance: \$34,257.63

President's Notes:

- Need president elect
- Education with other chapters to generate money for chapter
 - Need to contact other chapters.
- Meetings will be at noon
- Table budget for summer
- Chapter Excellence
 - David do you need help?

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

- Affiliate meeting later in year and possibly outside

Sponsors:

1. January – Mike Amdal with Citra Pest Control
2. February - Fernando Munoz with Tap Plastic
3. March – Daniel Y. with Showdigs
4. April – TBD Maria
5. May –
6. June –
7. July – BBQ

8. August –
9. September – A Clean Gutter
10. October -
11. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- Request to all affiliates to suggest 3 additional property managers
- Reach out to Four and Half for marketing information

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- March 22nd – Advanced Risk Management
- August 11th – Developing Rewarding Owner Relationships

How many people have signed up? Do we have to reach out to other chapters?

Website: (Brad Bonnifield Chair)

- Updates
 - Adding link to class schedule

Grants: (Joi Walker)

- Get list of grants
- Joi and Sean to work on education grant

Key-Speaker Schedule:

1. January - Jordan Muela (Kicking 2021 off on right foot)
2. February - Allison Desario (Banking)
3. March – Servando Sandoval (SB 91)
4. April –
5. May – Daniel Bornstein
6. June – Todd Ortscheid (Auxiliary Fees)
7. July – Hopefully BBQ
8. August – Kelly Tollifson
9. September – Anne Michelle or Todd Rothbard
10. October – Brian Chong CPA
11. November -
12. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

Meeting adjourned, 5:20 PM

Respectfully submitted, Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday April 1, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past President), _____
(President-Elect, Brad Bonnifield (/Director at Large), Lisa Goodman (Director at Large), Joi Walker
(Secretary), Brad Abbott (Treasurer)

Board Members Absent: Lisa Goodman

Executive Committee / Leadership Team Members:

Andrea Caldwell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media),
Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), Joi Walker (Grant
Chair), Nancy Penalzoza (Communication Co-Chair)

Executive Committee /Leadership Team Members Absent: Sandy Adams, Bob Basso

Meeting called to order at: 4:14 PM

Approval of Minutes – Motion to approve as written, Seconded, Motion Carried

Treasurer's Report (Brad Abbott):

- Paid members: 37
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 1
- Paid Affiliates: 38
- Free non-profit Affiliates: 4
- Bank balance: \$34,856.34

President's Notes:

- Need president elect
- Education with other chapters to generate money for chapter
 - Need to contact other chapters.
- Meetings will be at noon
- Table budget for summer
- I've been thinking about the fact that our chapter isn't growing. One complaint that I feel we are hearing is that the location and time of the meeting isn't convenient to people along the peninsula, so I think that we need to stop going to Flames and meet somewhere in the Mountain View Area which is in the middle. I really like the morning meetings, but having the meetings in the afternoon may attract some new companies.

Affiliate Report: (Marc Wood Chair * Nancy Penalzoza Co-Chair)

Speakers:

1. January – Mike Amdal with Citra Pest Control
2. February - Fernando Munoz with Tap Plastic
3. March – Daniel Y. with Showdigs
4. April – TBD Maria
5. May –

6. June –
7. July – BBQ
8. August –
9. September –
10. October -
11. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- August 11th – Developing Rewarding Owner Relationships

How many people have signed up? Do we have to reach out to other chapters?

Website: (Brad Bonnifield Chair)

- Updates
 - Adding link to class schedule

Grants: (Joi Walker Vice-Chair)

- Get list of grants

Key-Speaker Schedule:

1. January - Jordan Muela (Kicking 2021 off on right foot)
2. February - Allison Desario (Banking)
3. March – Servando Sandoval (SB 91)
4. April – Rhianna Campbell – Enhancing your marketing plan with online lead generation
5. May – Daniel Bornstein
6. June – Todd Ortscheid (Ancillary Fees)
7. July – Hopefully BBQ
 - Zoom Scavenger Hunt.... Speak with Dave from Water Heaters Only
 - Zoom Wine Tasting Class.
8. August – Kelly Tollifson
9. September – Anne Michelle or Todd Rothbard
10. October – Brian Chong CPA
11. November -
12. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she’s awesome
- David Park – Trust Attorney

Respectfully submitted, Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday May 6, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past President), (President-Elect, Brad Bonnifield (Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

(Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Sandy Adams (Legislative - State/National News), Brad Bonnifield (Web-site Chair), Joi Walker (Grant Chair), Nancy Penaloza (Communication Co-Chair) Sarah Riqueros

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Andrea Caldwell

Meeting called to order at: 4:10 PM.

Approval of Minutes – Motioned approval as with correction, Lisa Goodman was absent written, _ 2nd, motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 40
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 34
- Free non-profit Affiliates: 4
- Bank balance: \$ 34,969.89

President's Notes:

- Need president elect -
- Education with other chapters to generate money for chapter
 - Did we get Charles Chapter set up?
- Table budget for summer – Review in June
- Research alternate meeting locations that are less rundown
 - Have quarterly classes just for the bay area
 - Consider rotating locations
 - Currently paying \$700/ month
 - Keep meetings in the morning
- Go after at large members
- Mastermind Group to develop solid systems for our companies to thrive

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

Speakers:

1. January – Mike Amdal with Citra Pest Control
2. February - Fernando Munoz with Tap Plastic

3. March – Daniel Y. with Showdigs
4. April – Maria
5. May – Sheila with Legal Shield
6. June –
7. July – BBQ
8. August –
9. September –
10. October -
11. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- Nate with water heaters only scavenger hunt
- There are unpaid members. Need to send them a bill
- Sean reach out to Nate with Water Heaters Only – not done

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- March 22nd – Advanced Risk Management - Completed
- August 11th – Developing Rewarding Owner Relationships
 - o How many people have signed up? Do we have to reach out to other chapters?
- Motion: \$1000 Farewell gift MOTION: Made, 2nd, Carried

Website: (Brad Bonnifield Chair)

- Updates
 - o Adding link to class schedule
- Chapter member meetings not on website
- Update roles
- Can't click on affiliates
- Can't click on more info next to member names

Grants: (Joi Walker Vice-Chair)

- Membership Drive Application – Quarterly local educational class
- Chapter Growth Grant
- Chapter Trade Show Grant
- Chapter Advertising Grant
- Chapter Leadership Travel Grant

Key-Speaker Schedule:

1. January - Jordan Muela (Kicking 2021 off on right foot)
2. February - Allison Desario (Banking)
3. March – Servando Sandoval (SB 91)
4. April – Rhianna Campbell – Enhancing your marketing plan with online lead generation
5. May – Daniel Bornstein
6. June – Todd Ortscheid (Ancillary Fees)
7. July – Hopefully BBQ
 - o Zoom Scavenger Hunt.... Speak with Dave from Water Heaters Only
 - o Zoom Wine Tasting Class
8. August – Kelly Tollifson
9. September – Anne Michelle or Todd Rothbard
10. October – Brian Chong CPA
11. November – Mark Cunningham or any national speaker
12. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

Respectfully submitted,

Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday June 3, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past President), Brad Bonnifield (/Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Andrea Caldwell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), None (Co-Membership & Social Media Chair), Joi Walker (Grant Chair), Nancy Penaloza (Communication Co-Chair) Sarah Riqueros

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams

Meeting called to order at: 4:09 PM

Approval of Minutes – Motioned approval with correction to add Sarah Riqueros as present. Motioned Approval, Seconded, Motion Carried.

Treasurer's Report (Brad Abbott):

- Paid members: 43
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 37
- Free non-profit Affiliates: 4
- Bank balance: \$35,343.73

President's Notes:

- Need president elect –
- Speak with Dillon about doing hybrid meeting with zoom & in the restaurant or in parking lot
 - Send out an evite
 - See if we can do survey on Newsletter
 - Brad call Flams
- Education with other chapters to generate money for chapter.
 - Did we get Charles Chapter help sponsor our August class
- Table budget for summer – Review in June
- Research alternate meeting locations that are less rundown
 - Have quarterly classes just for the bay area
 - Consider rotating locations
 - Currently paying \$700/ month
 - Do search for banquet halls
 - Santa Clara Adobe?
 - Sarah give update
 - Keep meetings in the morning

- Go after “At large” members
- Mastermind Group to develop solid systems for our companies to thrive
- MOTION: Happy Retirement gift to Andrea Caldwell. Second and approved \$1000 cost.

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

Sponsors:

1. January – Mike Amdal with Citra Pest Control
2. February - Fernando Munoz with Tap Plastic
3. March – Daniel Y. with Showdigs
4. April – Maria
5. May – Sheila with Legal Shield
6. June – Strongman
7. July – Mark at Servpro
8. August – BBQ/ Charity fundraiser
9. September –
10. October -
11. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- Nate with water heaters only scavenger hunt
- 17 Unpaid Members – Brad send square link
- Donate community service then do BBQ after
 - o Sarah will look into outdoor for BBQ – this is a charity fundraiser
 - Possibly at Vasonna Park
 - o David Hunt will call Sunnyvale Community Services
 - o See what is best

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- March 22nd – Advanced Risk Management - Completed
- August 11th – Developing Rewarding Owner Relationships
 - o How many people have signed up? Do we have to reach out to other chapters?
 - o What time? Two days or 1 day

Website: (Brad Bonnifield Chair)

- Four and Half wants to charge \$5K to fix
- Sean to contact AJ, Jackie, and Brad about going to NARPM National
- Example: <https://monterey.narpm.org>
- Lisa: Star Chapter like Appfolio
 - o \$679 Set up fee
 - o \$105/ month for 350+ members
 - o <https://demo.starchapter.com>
- Check on what the difference are between NARPM and StarChapter

Grants: (Joi Walker Chair)

- Membership Drive Application – Quarterly local educational class
- Chapter Growth Grant
- Chapter Trade Show Grant
- Chapter Advertising Grant
- Chapter Leadership Travel Grant

Key-Speaker Schedule:

1. January - Jordan Muela (Kicking 2021 off on right foot)
2. February - Allison Desario (Banking)

3. March – Servando Sandoval (SB 91)
4. April – Rhianna Campbell – Enhancing your marketing plan with online lead generation
5. May – Daniel Bornstein
6. June – Todd Ortscheid (Ancillary Fees)
7. July – Hopefully BBQ
 - Zoom Scavenger Hunt.... Speak with Dave from Water Heaters Only
 - Zoom Wine Tasting Class
8. August – Kelly Tollifson – Swap doing BBQ instead
9. September – Anne Michelle or Todd Rothbard
10. October – Brian Chong CPA
11. November – Mark Cunningham or any national speaker
12. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

Meeting adjourned at 5:01 PM

Respectfully submitted,
Joi Walker,
Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday July 1, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past President) Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer), Brad Bonnifield (Director at Large)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Sarah Campbell (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), State/National News), Brad Bonnifield (Web-site Chair), Joi Walker (Grant Chair), Nancy Penaloza (Communication Co-Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams

Meeting called to order at: 4:09 pm

Approval of Minutes – Motioned approval as written, 2nd motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 43
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 34
- Free non-profit Affiliates: 4
- Bank balance: \$33,788.21

President's Notes:

- Need president elect – David volunteered to split next year with me.
- Need to get grants scheduled – Joi and Sean
- Speak with Dillon about doing hybrid meeting with zoom & in the restaurant or in parking lot
 - Send out an evite
 - See if we can do survey on Newsletter
 - Brad call Flames
- Education with other chapters to generate money for chapter.
 - Did we get Charles Chapter help sponsor our August class
 - Sent Charles email checking to see if they are sponsoring us
- Research alternate meeting locations that are less rundown
 - Have quarterly classes just for the bay area
 - Consider rotating locations
 - Currently paying \$700/ month or \$14 per plate
 - Do search for banquet halls
 - Santa Clara Adobe?
 - Sarah send us expenses, and form a ProForma Budget
 - Keep meetings in the morning
- Go after “At large” members

- Speak with AJ about sending message to members
- Lisa will look into a camera that follows a speaker if we end up doing a partial zoom meeting.

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

Speakers:

1. January – Mike Amdal with Citra Pest Control
2. February - Fernando Munoz with Tap Plastic
3. March – Daniel Y. with Showdigs
4. April – Maria
5. May – Sheila with Legal Shield
6. June – Strongman Real Estate Service
7. July – ServePro if no one else is interested
8. August – BBQ/ Charity fundraiser
9. September – Possibly Bob with A Clean Gutter
10. October -
11. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- 17 Unpaid Members – Brad send square link
- Donate community service then do BBQ after
 - Vasona Park

Education: (Andrea Caldwell Chair * Sarah Riqueros Vice-Chair)

- March 22nd – Advanced Risk Management - Completed
- August 11th – Developing Rewarding Owner Relationships
 - How many people have signed up? Do we have to reach out to other chapters?
 - Two days, mornings

Website: (Brad Bonnifield Chair)

- Four and Half wants to charge \$5K to fix
- Sean to contact AJ, Jackie, and Brad about going to NARPM National
- Example: <https://monterey.narpm.org>
- Lisa: Star Chapter like Appfolio
 - \$679 Set up fee
 - \$105/ month for 350+ members
 - <https://demo.starchapter.com>
- Check on what the difference are between NARPM and StarChapter
 - Move forward with Star Chapter if no response from national by mid June
 - NARPM pays for hosting and initial set-up. Customizations cost extra. Takes about 1 week to get going.

Grants: (Joi Walker Chair)

- Membership Drive Application – Quarterly local educational class
- Chapter Growth Grant
- Chapter Trade Show Grant
- Chapter Advertising Grant
- Chapter Leadership Travel Grant

Key-Speaker Schedule:

1. August – BBQ
2. September – Anne Michelle or Todd Rothbard
3. October – Brian Chong CPA

4. November – Kelly Tollifson
5. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

Meeting adjourned at 5:01 PM

Respectfully submitted,
Joi Walker
Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday August 5, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members present: Sean McCarthy (President), David Hunt (Past President), (President-Elect, Brad Bonnifield (Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Sarah Riqueros (Certification/Education), Maria Neumann (Communications Co-Chair / Social Media), Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), Joi Walker (Grant Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams, Nancy Penaloza

Meeting called to order at: 4:11 pm

Approval of Minutes – Motion to approve as written, Seconded, Motion Carried.

Treasurer's Report (Brad Abbott):

- Paid members: 44
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 34
- Free non-profit Affiliates: 4
- Bank balance: \$33,889.16

President's Notes:

- Need president elect –
 - Sean is open to be president for 2022 if you want to live through another year of this
- Need to get grants scheduled – Joi and Sean – not done
- Sean emailed Alisha about doing hybrid meeting with zoom & in the restaurant or in parking lot
 - Send out an evite
 - See if we can do survey on Newsletter
 - We will be meeting at Flames
 - When can we start meeting in person?
 - Do you think members will attend with new mask mandate
- Research alternate meeting locations that are less rundown
 - Have quarterly classes just for the bay area
 - Consider rotating locations
 - Currently paying \$700/ month or \$14 per plate
 - Do search for banquet halls
 - Santa Clara Adobe?
 - Keep meetings in the morning
- Go after “At large” members

- Speak with AJ about sending message to members
- Lisa will look into a camera that follows a speaker if we end up doing a partial zoom meeting.

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

Speakers:

1. August – BBQ/ Charity fundraiser
2. September – Possibly Bob with A Clean Gutter
3. October -
4. November –

Membership (Lisa Goodman Chair * Andrea Caldwell Co-Chair)

- 17 Unpaid Members – Brad send square link
- Donate community service then do BBQ after
 - Vasonna Park

Education: (Sarah Riqueros)

- March 22nd – Advanced Risk Management – Completed
- Education with other chapters to generate money for chapter.
 - I'm not sure if Charles signed up. I called him and didn't get a returned call.
- August 11th – Developing Rewarding Owner Relationships
 - How many people have signed up? Do we have to reach out to other chapters?
 - What time? Two days or 1 day

Website: (Brad Bonnifield Chair)

- Presentation from Rachel with Starchapter to go over their website and service
- This is our current chapter through NARPM: <https://santaclara.narpm.org/>

Grants: (Joi Walker Vice-Chair)

- Membership Drive Application – Quarterly local educational class
- Chapter Growth Grant
- Chapter Trade Show Grant
- Chapter Advertising Grant
- Chapter Leadership Travel Grant

Key-Speaker Schedule:

1. August – BBQ
2. September – Anne Michelle or Todd Rothbard
3. October – Brian Chong CPA
4. November – Kelly Tollifson
5. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

Meeting adjourned 5:11

Respectfully submitted, Joi Walker, Secretary

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday September 2, 2021 – 4:00-5:00pm via Zoom

MINUTES

Board Members: Sean McCarthy (President), David Hunt (Past President), Sean McCarthy (President-Elect), Brad Bonnifield (/Director at Large), Lisa Goodman (Director at Large), Joi Walker (Secretary), Brad Abbott (Treasurer)

Board Members Absent: none

Executive Committee / Leadership Team Members present:

Maria Neumann (Communications Co-Chair / Social Media) Marc Wood (Affiliate Co-Chair / Fundraiser Chair), Brad Bonnifield (Web-site Chair), None (Co-Membership & Social Media Chair), Joi Walker (Grant Chair), Nancy Penaloza (Communication Co-Chair)

Executive Committee /Leadership Team Members Absent: Bob Basso, Sandy Adams

Meeting called to order at: 4:09 pm

Approval of Minutes – Motion to approve August 2021 minutes as written, Seconded, Motion carried.

Treasurer's Report (Brad Abbott):

- Paid members: 44
- Free Members: 2
- Staff Members: 2
- New Members: 0
- New Affiliates: 0
- Paid Affiliates: 35
- Free non-profit Affiliates: 4
- Bank balance: \$33,288.15

President's Notes:

- Need president elect –
 - Chris Cossitor may be able to step in on the second half of 2022
- Need to get grants scheduled – Joi and Sean – not done
- Sean emailed Alisha about doing hybrid meeting with zoom & in the restaurant or in parking lot
 - Send out an evite
 - See if we can do survey on Newsletter
 - We will be meeting at Flames
 - When can we start meeting in person?
 - Do you think members will attend with new mask mandate
- MOTION: Donate \$1200 to Sunday Friends from BBQ proceeds and savings.
- Go after “At large” members
 - Speak with AJ about sending message to members
- Lisa will look into a camera that follows a speaker if we end up doing a partial zoom meeting.

Affiliate Report: (Marc Wood Chair * Nancy Penaloza Co-Chair)

Speakers:

1. September – Possibly Bob with A Clean Gutter
2. October -
3. November –

Membership (Lisa Goodman Chair)

- 17 Unpaid Members – Brad send square link
- Donate community service then do BBQ after
 - Vasonna Park

Education: (Sarah Riqueros Chair)

- Both classes - March 22nd & August 11 completed

Website: (Brad Bonnifield Chair)

- Meet with Rachel with Starchapter to go over their website.
- This is our current chapter through NARPM: <https://santaclara.narpm.org/>

Grants: (Joi Walker Vice-Chair)

- Membership Drive Application – Quarterly local educational class
- Chapter Growth Grant
- Chapter Trade Show Grant
- Chapter Advertising Grant
- Chapter Leadership Travel Grant

Key-Speaker Schedule:

1. September –Todd Rothbard
2. October – Brian Chong CPA
3. November – Kelly Tollifson
4. December – Christmas Party

Potential Speakers:

- Mark Nelson – How to invest in real estate outside CA
- Tracey Merrell – Kimball Tirey, and St. John LLP
- Chrysztyna Rowek – Because she's awesome
- David Park – Trust Attorney

NARPM - SANTA CLARA COUNTY CHAPTER
BOARD of DIRECTORS & Planning Meeting
Thursday October 7, 2021 – 4:00-5:00pm via Zoom

MINUTES

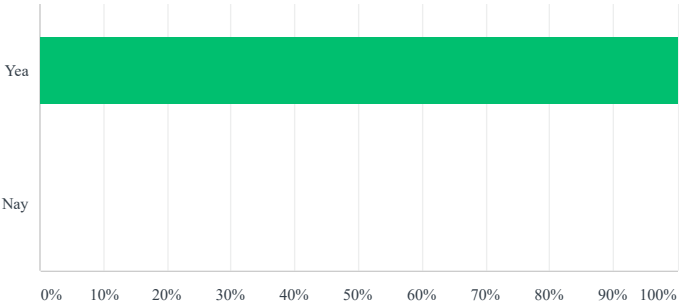
No Quorum, no minutes.

- Agreement to Cancel Christmas party due to COVID concerns

Page 1

Below are the 2021 Santa Clara County Chapter of NARPM Board of Directors nominees. If you approve of the nominees, please select 'Yea'.President: Sean McCarthyPresident-Elect: TBDPast President: David HuntSecretary: Joi WalkerTreasurer: Brad AbbottDirectors at Large: Lisa Goodman & Brad Bonnifield

Answered: 8 Skipped: 0



ANSWER CHOICES	RESPONSES	
- Yea	100.00%	8
- Nay	0.00%	0
TOTAL		8
Comments (1)		

Would you be interested in joining the leadership team and/or board of directors?

Answered: 3 Skipped: 5

RESPONSES (3)

WORD CLOUD

TAGS (0)

Sentiments: OFF

Apply to selected Filter by tag

Search responses s ?

Showing 3 responses

Not at this time. If you were able to get these same board members along with Brian Folden to serve at the same time, I may be interested in assisting. Thank you for all you do to keep NARPM Santa Clara alive and well.

12/1/2020 11:28 PM

[View respondent's answers](#) Add tags

10/1/2020 11:20 PM

[View respondent's answers](#)

[Add tags](#) –

Not this year

10/1/2020 4:44 PM

[View respondent's answers](#)

[Add tags](#) –

Too late, already sucked in years ago.

10/1/2020 3:48 PM

[View respondent's answers](#)

[Add tags](#) –

Please provide some feedback on how we can better serve our members as we head into 2020.

Answered: 2 Skipped: 6

RESPONSES (2)

WORD CLOUD

TAGS (0)

(Sentiments: OFF ☐

[Apply to selected](#)

[Filter by tag](#)

s

?

Showing 2 responses

Regular zoom meetings for NARPM Santa Clara during this SIP would have been very easy and welcomed by members.

10/1/2020 11:20 PM

[View respondent's answers](#)

[Add tags](#) –

BOD is doing an EXCELLENT job.

10/1/2020 3:48 PM