

# Certificate of Compliance

This certifies that the

## Western Montana Chapter

Has successfully met the requirements and is in full compliance  
with standards set for a local chapter by the  
National Association of Residential Property Managers.

12/1/2009

  
2009 President



National Association of Residential Property Managers

  
Executive Director



National Association of Residential Property Managers

### Chapter Certificate of Compliance Checklist

Due December 1, 2009

**PURPOSE:** NARPM® must ensure that chapters are viable entities, capable of delivering the services expected by members of the Association. Chapter leadership must be accountable for their fiduciary and legal duties. This form can be downloaded in form fill edition at <http://www.narpm.org/chapter-services/support-services.html> and click on 2009 Chapter Certificate of Compliance

The undersigned officers of the NARPM® Western Montana Chapter certify that the chapter completed this Certificate of Compliance and submitted the required documents as noted on this certificate.

GOVERNANCE REPORTING	
1.	Attach a list of the names and positions of the upcoming Board of Directors and committee chairs for the Chapter (Must be submitted to reach chapter compliance) Aaron Gingerelli, President, Michelle McLinden, President-Elect, Tom Chapman, Past-President, Jennifer Plum, Secretary, Jodi Corrette, Treasurer, Kari Neumiller, Treasurer-Elect, Lisa Gohrik, Education Coordinator, Sherrie Featherly, Website Coordinator, Rebecca King, Board Member at Large, Lantha Rienhart, Board Member at Large-Elect, Jim McGrath, Affiliate Board Member, Craig Best, Affiliate Board Member-Elect.
2.	Have chapter bylaws changed this year? <u>NO</u> If yes, attach copy to this report and highlight changes. (Must be submitted to reach chapter compliance)
3.	Have chapter articles of incorporation changed this year? <u>NO</u> If yes, attach copy to this report and highlight changes. (Must be submitted to reach chapter compliance)
4.	Attach copies of minutes for each Board of Directors meeting. Chapters are required to meet and maintain corporate minutes and other records as designated by state law and chapter bylaws. (Must be submitted to reach chapter compliance) (See Attached)
5.	Chapter officers assume their respective offices: <u>January 1</u>
6.	Date of fiscal year: <u>Calendar Year</u>
7.	The chapter maintains a minimum membership of seven (7) NARPM® Professional/Support Staff members. <u>Yes</u>
8.	Does the chapter maintain a FDIC bank account in the chapter's corporate name <u>YES</u> . Name of Banking Institution: <u>First Interstate Bank PO Box 4467 Missoula, MT 59806</u>
9.	The chapter has filed a Corporate Annual Registration Report/Renewal for the state in which it is registered for this calendar year? *Send NARPM® an up to date copy of corporate annual registration report/renewal (Must be submitted to reach chapter compliance) <u>Yes</u>
10.	Effective 2010, local/state chapter Presidents, or their designee, must participate in a minimum of three of the quarterly Regional conference calls. In 2009, did your chapter participate in these calls? <u>Yes</u>

	<b>CHAPTER FINANCIAL REPORTING</b>
11.	Attach copy of financial statement for current year. <u>(See Attached)</u>
12.	Attach copy of proposed annual budget for the following year. <u>(See Attached)</u>
13.	Attach copy of federal tax return. <u>(See Attached)</u>
14.	Beginning in 2008, small tax-exempt organizations that previously were not required to file returns risk losing their tax-exempt status if they do not file an annual electronic notice (e-Postcard) form 99-N. (more information can be found at <a href="http://www.irs.gov/charities">www.irs.gov/charities</a> ). Did the chapter file notice? Y <input type="checkbox"/> N <input type="checkbox"/> If no, why not:

	<b>CHAPTER PLANNING</b>
15.	Attach a copy of chapter's annual calendar of events for the following year. <u>(See Attached)</u>
16.	The Chapter President-Elect attended the training sessions at the national leadership training session prior to taking office. <u>Yes &amp; No</u> If no, state why not: <u>Unfortunately, our President-Elect "Pam Gannon" resigned a couple of weeks ago for personal reasons. Pam had taken the leadership and ethics training in Portland at the NW Regional, but is no longer our President-Elect. Michelle, our new President-Elect plans to attend the NW Regional in Spokane, WA in 2010 and will complete those trainings at that time.</u>
17.	Did chapter communicate at least four times during the year with members? <u>Yes, See Attached</u> If yes, attach one copy of the communications chapter had with the members. This can be electronic or printed. If the chapter submitted the Chapter Excellence application check Yes and documentation will not be required. <u>No</u> If no, state reason why not: <u>Time Limitations</u>
18.	Did chapter sponsor/participate in effective educational programs for NARPM® members affiliated with the chapter during certification year. This can be designation class or local classes that have special speakers. For state/regional chapters, education can be part of their state/region convention. <u>Yes Attach one copy of brochure or flier. See Attached</u>
19.	The chapter is using the Chapter Leader section of NARPM.org( <a href="http://www.narpm.org/chapter-services/">http://www.narpm.org/chapter-services/</a> ) : <u>Yes</u>
20.	The chapter website is kept up to date? <u>Yes</u>
21.	The chapter is interested in looking at a website supported by NARPM®: <u>Yes</u> Contact persons name and number: <u>Sherrie Featherly - Sherrie@montana.com</u>
22.	The chapter filed for the current year Chapter Grant: <u>No</u> Check here if you would like more information on grants: <u>Yes</u> <i>The purpose of the grant is to strengthen and grow chapter membership through education and networking opportunities.</i>

12/01/2009 02:07

**Other Items:**

23. Rate the health of the chapter (1 - 10; 10 being highest)

a. If answer is 7 or less, what barriers does the leadership face in getting the chapter going?  
9. We had a strong growth of membership and affiliate membership in 2009.

b. If answer is 7 or less, what resources would be helpful from national (i.e.: Speakers, mentoring, etc.)

c. If answer is 8 or above, what are the cool things the chapter is doing that other chapters might like to hear about? We hosted an affiliate fair, had interactive round-table discussions, and brought in Susan Albern who did a great presentation for our chapter!

**Chapter Officers' Signatures Certifying Review and Approval of Chapter Certification:**

A. C. [Signature] 11/27/09  
Current Certification Year President/Date

Michelle McLinden 12.01.09  
Current Certification Year Incoming President/Date

**CHAPTER RE-CERTIFICATION REQUIREMENTS**

The certification requirements were developed to maintain fair, specific procedural standards for the chapters and to protect the legal accountability of the national association. The NARPM® Board of Directors determines each chapter's recertification status after consideration of recommendations submitted by the Regional Vice President and the Membership Committee.

**Submission Requirements**

- Certificate of Compliance signed by the Chapter President and President-Elect/Vice President serving in Current Certification Year.
- Supporting materials as requested.

**WESTERN MONTANA CHAPTER NARPM BOARD MEETING MINUTES**  
**March 5<sup>th</sup>, 2009**

The meeting was called to order at 12:00 p.m. by President Aaron Gingerelli. Attendees included Aaron Gingerelli of Summit Property Management, Tom Chapman of Professional Property Management, Jennifer Plum, Sherrie Featherly of Missoula Property Management, Jodi Corette of Grizzly Property Management, Lisa Gohrick of Grizzly Property Management, Jim McGrath of Missoula Housing Authority, Pam Gannon of Real Estate Management Group and Rebecca King of Tri West Property Management.

Handouts/packets handed out by Jennifer and Lisa.

Aaron gave Sherrie the updated Affiliate Member list to update the website. Jodi will begin keeping a list of Affiliate Members on the treasures report, which are current on their dues.

Deadline with the Independent on article topics are March 6<sup>th</sup>, 2009. Authors and article topics are as follows:

1. Sherrie Featherly – Average rental price comparison by bedroom # and neighborhood. (This will be broken into two separate articles).
2. Jennifer Plum – Application Process.
3. Lisa Gohrick – How to get your security deposit back (with pictures).
4. Pam Gannon – Roommates / Benefits and concerns.
5. Aaron Gingerelli – Utility set up and averages.
6. Jim McGrath – Affordable Housing.
7. Tom Chapman – Renter safety, housing inspections.

Becky and Jodi will email us with their choice of article. Aaron will contact the Independent to let us know how long our articles can be and will report back to the group.

The Independent will need to present the group with the outside and inside cover. The covers will need to be emailed to each of us for our vote to accept.

Jennifer discussed new meeting space with the group for our monthly and continuing education meetings. Jennifer presented proposals from The Hilton, The Broadway Inn, and Missoula Children's Theatre. At this time The Doubletree does not charge a room fee and charges \$16.00 per plate for food.

Aaron discussed the Regional Conference in Portland, Oregon. From a show of hands the majority of the board will be attending the conference. The board discussed, voted, and approved the following criteria to be reimbursed for attending a conference:

1. President Elect will be fully reimbursed for a conference (either regional or national, but not both) including gas, room, registrations, and classes. Ethics training must be completed.
2. \$100.00 reimbursement for any National NARPM Member for a conference (either regional or national, but not both). Must attend Leadership Symposium and Conference.
3. \$200.00 reimbursement for any Board Member for a conference (either regional or national, but not both.) Must attend Leadership Symposium and Conference.
4. Must report conference notes back to the chapter.

Aaron has been speaking with realtors who may be interested in purchasing our vacancy reports and statistics. Aaron would like to see a polished and true data base of vacancies/occupancies. Some ideas brought up as follows:

1. Monthly, Quarterly, Semi Annual or Annual report for sale to interested parties.
2. Monthly, Quarterly, Semi Annual or Annual payment of interested parties to access these reports.
3. Log on feature to the website for interested parties to locate and review these reports.
4. Making it mandatory for property management companies that are members report their vacancies to produce a more accurate report.

This topic will be discussed at further meetings and no decision has been made regarding the sale of these reports.

At the previous monthly meeting on February 26<sup>th</sup>, 2009 the topic of purchasing a Certificate of Deposit with a portion of the chapter's funds had been discussed. During the past few days Jennifer has contacted several banks within the Missoula area to inquire about current CD rates, penalties, and terms. A handout was presented with eight local banks including an Affiliate Member bank.

Sherrie suggested using our Affiliate Member, Treasure State Bank, for the purchase of the CD. Others had different ideas and suggestions regarding the length of the CD we should purchase. No decision was made and further discussion will be done throughout emails over the next few months and then will be discussed again at our next board meeting.

Jodi states we have been averaging a \$1000.00 increase in the checking account each year over the past few years.

Meeting was adjourned at 1:22 p.m.

Respectfully submitted,

Jennifer S. Plum  
Licensed Property Manager



**WESTERN MONTANA CHAPTER NARPM BOARD MEETING MINUTES**  
**Wednesday, June 10<sup>th</sup>, 2009**

The meeting was called to order at 12:00 p.m. by President Aaron Gingerelli. Attendees included Aaron Gingerelli of Summit Property Management, Tom Chapman of Professional Property Management, Sherrie Featherly of Missoula Property Management, Jodi Corette of Grizzly Property Management, Jim McGrath of Missoula Housing Authority, Pam Gannon of Real Estate Management Group and Rebecca King of King Property Management.

Absent attendees include Lisa of Garden City Property Management and Jennifer of Plum Property Management.

Decision on chapter funds – Jennifer called around to various banks. Aaron suggests going to a 3 to 6 month term at best rate possible and invest with five to ten thousand. Tom agrees, it seems that we are maintaining around the same level of funds from month to month. There was some discussion about the National Grant contributing to Continuing Education. Expected funds are \$600.00. We are somewhat breaking even on the class costs. Aaron recommends those classes that apply to realtors could be marketed to the realtors to increase funds coming in. Tom moves to do approve this idea, Sherrie seconds. Aaron suggests that the bank we choose to hold our CD should become affiliate members, if not already. All are in favor, no opposition.

Monthly lunch costs – Currently we are collecting \$4.00 for lunch. Aaron suggests reducing the lunch cost since we are making money in other areas. Sherrie suggests we should rename it to "due" as other chapters have. Current rate for lunch is \$15.00 per plate and we charge \$19.00 per plate. Aaron asked for Jim's input as an affiliate member on paying \$5.00 and skip lunch. Aaron discussed doing a lesser lunch and the hotel will not allow this. We did look into other venues and this is an average cost. Aaron suggests going to \$17.00 instead of \$19.00 per lunch. Tom recommends considering the duration of the meeting along with lunch costs and charging actual cost. Aaron states we will potentially be losing \$1500.00 per year of revenue if we charge actual cost of lunch. Sherrie questions increasing the meeting time and the affect it will have on days we have continuing education. If approved this could put our continuing education classes ending at 6:00 p.m. Pam advises on days we have continuing education we could skip guest speakers and simply have business meeting. Sherrie suggests breakfast meeting. Will breakfast meeting be at a cheaper rate? A survey for the group's opinion is suggested. Members discussed bringing in speakers from a national level. Tom recommends charging an increased meeting fee. Sherrie suggests sending out a mailer as we do for continuing education classes to tally attendees. We can also market this to others. Final voting: lunch will drop to \$15.00 per plate and reevaluate at a later date. Sherrie and Aaron are opposed to this decision. A larger fee may be charged for lunches with a national guest speaker.

Concerns were brought up regarding the Independent's Parade of Apartment Inserts. Members have not seen the inserts distributed around Missoula. Sherrie recommends distributing the inserts to tenants walking in their offices. Was this a good use of our funds.

Meeting Duration – Currently we meet from 11:30 a.m. to 1:30 p.m. Including lunch and guest speaker there isn't enough time to conduct business. Aaron says this will pose challenges to encouraging employers to bring employees as they will be out of the office for longer periods of time. Rebecca recommends increasing the meeting by half an hour. Aaron states members can leave when finished as opposed to filling entire time. Sherrie suggests incorporate round table discussions. Having the round table discussions can help us grow stronger as a group and assist in

networking. Jennifer can do a survey. Per Tom, a format change in the meeting could be done at the President's level.

SB 323/Education – Tom states the Board of Realty Regulation doesn't care about this. Consider doing an education component in September working with Olivia at ASUM as the guest speaker. Pam will coordinate this with Olivia. Tom will email the Board the progress use as an opportunity to grow the membership.

LORC – Tom would like a position description for LORC. Aaron will look into this and then run it by Pam and the Board.

Montana Fair Housing as an Honorary Member – Pam states this is well received by everyone at her section of continuing education. Their contribution is recognized and we should make them an honorary member. A letter to them mentioning this at the next meeting is recommended. Sherrie moves to approve and Rebecca seconds. All in favor and no opposed.

Update of Affiliate Membership – Sherrie will update the website to reflect current affiliates. The two honorary members are the Missoula Police Department and Montana Fair Housing. No one will be listed on the website if they have not paid their affiliate dues. Aaron recommends networking for vendors that can help grow our chapter. Aaron has welcome letters and form letters explaining the benefits of joining. Per Jodi, Affiliate Membership is January through January. If an affiliate becomes a member mid-year their rate will be pro-rated. Aaron would like to have recognition at following meeting. Tom and Aaron state members get a free lunch if bringing on an affiliate. Tom recommends updating email list. The more we communicate with each other the more chance we have of keeping things going and being prepared when September comes around.

In the absence of Jennifer, Pam took notes for this meeting.

Meeting was adjourned

Respectfully submitted,

Jennifer S. Plum  
Licensed Property Manager  
Plum Property Management, LLC



**WESTERN MONTANA CHAPTER NARPM BOARD MEETING MINUTES**  
**Thursday, November 19<sup>th</sup>, 2009**

The meeting was called to order at 1:15 p.m. by President Aaron Gingerelli. Attendees included Aaron Gingerelli of Summit Property Management, Tom Chapman of Professional Property Management, Sherrie Featherly of Missoula Property Management, Jodi Corette of Grizzly Property Management, Jim McGrath of Missoula Housing Authority, Jennifer Plum of Plum Property Management, Michelle McLinden and Karli Friia of Real Estate Management Group and Rebecca King of King Property Management.

Absent attendees include Rebecca King of King Property Management.

Aaron brought the meeting to order directly after our monthly NARPM luncheon.

Officer Training – President and President Elect (Michelle McLinden and Karli Friia) will need to complete Ethics training.

NARPM Schedule for 2010 – Aaron and Michelle will work together to complete a schedule for 2010.

Chapter Compliance Requirements – Aaron has handed out the Chapter Certificate of Compliance Checklist. Jodi will submit financial information. Lisa will submit educational information. Aaron and Jennifer will complete the remainder. Lisa will look into required ethics training.

Parade of Apartments – The Missoula Independent has submitted a new bid for the 2010 Renter's Resource Guide. Distribution plan has been revised and will need to be revised further from the bid given.

Other Topics for Discussion – Group inquired when Pam Gannon will be making her payment back to the group for Oregon Conference. Jodi will contact her at the Lambros Polson office.

4<sup>th</sup> Board Meeting Date will be held on December 17<sup>th</sup>, 2009 following the Chapter luncheon.

Meeting was adjourned

Respectfully submitted,

Jennifer S. Plum  
Licensed Property Manager  
Plum Property Management, LLC

**WESTERN MONTANA CHAPTER NARPM BOARD MEETING MINUTES**  
**Thursday, December 17<sup>th</sup>, 2009**

This meeting is scheduled to take place immediately following our final chapter meeting on the date listed above.