



CHAPTER COMPLIANCE 2022 NOTES

C012 MONTEREY BAY CHAPTER

Awarded Chapter in Review/Conditional Compliance 2022 for the following reasons:

- Missing required Chapter Model Bylaws update from 2021.
- Chapter has not submitted paperwork for an extension to file nor filed a tax return for 2021. Filed paperwork with California State but not the IRS.
- Missing final 2021 Profit & Loss Statement.
- Missing Chapter Board of Directors Meeting Minutes for 2021.
- Missing 2022 Slate of Officers with New Member Mentor name.
- Missing Proof of Elections for 2022 Officers.

Levels of Chapter Recertification

Full recertification

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

Chapter in Review (Amended 2022)

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

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

De-certification

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

Shirley N. Weber, Ph.D.
California Secretary of State



DR. SHIRLEY N. WEBER
CALIFORNIA SECRETARY OF STATE

California Secretary of State

Submission and Payment Confirmation

Thank you for using **bizfile California** (<https://www.sos.ca.gov/business-programs/bizfile/>)! Your Corporation Statement of Information and payment was submitted successfully and is pending statutory review by the California Secretary of State.

Please print this screen as a record of submission and credit card payment.

Submission Summary:

Entity Name: MONTEREY BAY CHAPTER, NATIONAL ASSOCIATION OF RESIDENTIAL PROPERTY MANAGERS, INC.

Entity Number: C2265620

Submission Type: Statement of Information: Complete

Submission Date: 03/17/2022

Total Paid: \$5.00

What's next?

Please check the submitter's email for further details of your filing submission and instructions on how to check the status of your submission.



National Association of Residential Property Managers

Monterey Bay Chapter

NARPM MBC 2022 Budget (Draft)

Income

Member dues	\$5,500.00
Affiliate dues	\$ 500.00
Meeting Fees	\$2,300.00
Incentives/Grants/ Scholarships	\$ 700.00

Total Income	\$9,000.00
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Expenses

Meeting Expenses	\$2,000.00
Website	\$1,800.00
Meeting speakers	\$3,000.00
Conferences	\$1,000.00
MCAR Membership	\$ 375.00
Operating Expenses	\$ 325.00
Donations	<u>\$ 500.00</u>
Total Expenses	\$9,000.00

Net Income	\$ 0.00
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C/O Bay Property Management
140 John Street, Salinas CA 93901 831-422-5614
Monterey.narpm.org

ONLINE MEETING - MEMBERS ONLY!

CA PROPOSITION 19 – PROPERTY TAXES

On November 3, 2020, California voters passed Proposition 19, a ballot measure that (1) significantly limits the ability of parents to pass their Prop. 13 property tax base to their children and (2) allows seniors better opportunities to relocate by allowing them to transfer their Prop. 13 property tax base to new homes. Local estate planning attorney Kyle Krasa explain the new law and how it affects you and your clients.

COST - \$17.00

DATE - JANUARY 21, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – MEMBERS ONLY!

TENANT LIABILITY INSURANCE

The hidden truths of a master liability policy

Different types of master liability policies

Best practices when implementing a tenant liability policy program

Adding a revenue stream to property management

Bring your questions!

COST - \$17.00

DATE - OCTOBER 21, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

PERSONNEL PROCEDURES ESSENTIALS: HIRING & FIRING

You've reached capacity! You can't add another property without help! This course from NARPM® will guide you through the hiring and employee management process of the small property management company while also looking at when and how best to address expansion of the company and its portfolio

Who Should Attend:

Company owners (1 person shops) looking to expand past themselves; Small company owners considering expansion; Property managers; Office managers

What you will learn:

Students of this course will come away with basic knowledge on not only when to hire your first assistant, but many of the essential steps involved in hiring. Students will further gather information on several best practices in the employee management process.

How you will benefit:

One person company owners can learn when and how to hire that first assistant or property manager

- Smaller company owners can better judge when and how to manage expansion and job duties
- Larger company owners and staff can discern about office staffing setup (departmental vs portfolio)

Learning Objectives:

- Determine when to hire
- Develop effective job descriptions
- List best hiring and selection practices
- Outline inclusions in a policy-personnel handbook
- Plan overall training and retention
- Identify how and when to terminate

COST - \$165.00 NATIONAL MEMBERS

COST - \$265.00 LOCAL-ONLY MEMBERS

DATE - NOVEMBER 17, 2021 AND NOVEMBER 18, 2021

TIME - 09:00 AM – 12:00 PM

ONLINE MEETING - MEMBERS ONLY!

ANCILLARY REVENUE BASICS (FEE MAXIMIZING)

PMAssist's Todd Ortscheid will discuss the basics of maximizing the revenue in your property management company through the use of ancillary fees. Forget growth through door count, which just creates more work and more costs. Instead, focus on revenue per door, which will boost your revenue and profits without any additional work or costs.

COST - \$17.00

DATE - FEBRUARY 18, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING - MEMBERS ONLY!

COMPETING IN A CHANGING MARKET

In the coming decade, the property management industry will be rocked by dramatic change. Platforms like Zillow are aggressively developing all-inclusive PM solutions. Can independent agencies continue to compete? Keith Becker will join us to discuss.

COST - \$17.00

DATE - MARCH 18, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING - MEMBERS ONLY!

How to Operate a Low Effort, High Profit Property Management Company

Steve Crossland will join us to discuss how he achieved financial freedom through property management while remaining a small, solo operator of 100 doors. He will also detail the pros and cons of staying small versus growing large.

COST - \$17.00

DATE - APRIL 15, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING - MEMBERS ONLY!

SB91 EMERGENCY RENTAL ASSISTANCE PROGRAM

UNITED WAY MONTEREY COUNTY

The Monterey County SB91 Emergency Rental Assistance Program (ERAP) is a program administered by United Way in collaboration with the Monterey County Department of Social Services. The program will distribute \$28 million of rent and utility assistance to low-income eligible households located in Monterey County that are facing housing instability because of loss or reduction in income due to the COVID-19 crisis. The assistance will be distributed by 13 participating partner agencies serving different areas of the county, with the goal of preventing homelessness amongst Monterey County residents.

COST - \$17.00

DATE - MAY 20, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

MAINTENANCE: BEYOND THE BASICS

Maintenance and how you handle it will either make or break your business. This course covers the vital everyday maintenance components of a successful property management company.

Who Should Attend:

Brokers; Owners; Property Managers; Maintenance Coordinators; Maintenance Assistants; Office Staff and everyone else in the office that will be affected by maintenance

What you will learn:

- How To Manage Tenant And Owner Expectations
- The Components Of Maintenance Policies And Procedures
- How To Work With Sub-Contractors
- How To Schedule And Track Work Orders

How you will benefit:

Having the knowledge to effectively systematize your maintenance will result in happier owners and tenants; better maintained properties, fewer emergency maintenance headaches and less stress for the property management staff!

Learning Objectives:

- Maintenance Policies & Procedures
- Managing Tenant & Owner Expectations
- Maintenance Categories & Understanding Maintenance
- Staffing & Maintenance Competency Required
- Scheduling & Tracking
- Working With Sub-Contractors
- Inspections/Surveys
- Accounting for the Maintenance

COST - \$165.00 NATIONAL MEMBERS
COST - \$265.00 LOCAL-ONLY MEMBERS
DATE - JUNE 23, 2021 AND JUNE 24, 2021
TIME - 09:00 AM – 12:00 PM

ONLINE MEETING – MEMBERS ONLY!

PANEL DISCUSSION: MANAGING PROPERTY REMOTELY

As our industry adjusted to the reality of a worldwide pandemic, many property management companies discovered they were able to function without brick and mortar office space.

Many of our peers in the industry gave up physical offices and hired virtual assistants. Others allowed their teams to work remotely.

Join us as we host a panel discussion with professionals who have successfully made this transition to remote operations. They will share what worked well for them and what was problematic.

This is our opportunity to learn from the experiences of those who have already taken these steps!

Bring your questions!

COST - \$17.00

DATE - JULY 15, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – MEMBERS ONLY!

APPLICATION PROCESS: FIRST IN VS BATCHING

What's the best process for screening and selecting applicants?

It's in the best interest of your client to take the most qualified prospect. Do you collect a number of applications and choose the most qualified?

Do you screen applications one at a time as they come in and approve or deny before moving on to the second?

California attorney firm Kimball, Tirey & St. John LLP will be joining us to discuss these options.

Join us to discover the best way to minimize your exposure to fair housing lawsuits.

Bring your questions!

COST - \$17.00

DATE - AUGUST 19, 2021

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – MEMBERS ONLY!

SOLVING THE “BY-OWNER” MYSTERY **SCOTT P. BRADY**

It has been estimated that 70% of property owners are self-managing their investments.

As professionals, we are competing for the remaining 30% of properties.

How do we solve the “by-owner” mystery?

Fellow NARPM member and property manager Scott P Brady will be joining us to discuss this topic.

Bring your questions!

COST - \$17.00

DATE - SEPTEMBER 16, 2021

TIME - 12:00 PM – 02:00 PM

NARPM Monterey Bay Chapter Officers

March 26, 2021

- | | |
|--------------------|---------------------|
| 1. President: | William Sterling |
| 2. Secretary: | Audrey Wardwell |
| 3. Treasurer: | Fred Nohr |
| 4. Membership: | Carrie Appling-Lake |
| 5. Past President: | Rhonda Navarro |
| 6. Legislative: | Jan Leasure |

Narpm Monterey Bay Installation of Officers

2021-2022

The following officers have agreed to continue service through 2022.

President: William Sterling

President-Elect: vacant

Secretary: Audrey Wardwell

Treasurer: Fred Nohr

Past President: Rhonda Navarro

You have been selected by your peers to serve in the role you are about to assume. You will be identified as directors of the Monterey Bay Chapter, dedicated to the best interests of the public and the welfare of your members.

As newly elected directors, you are entering into a new phase of service, cooperation, and leadership. You will exemplify the best that the residential property management profession has to offer. Guard this trust carefully and give full measure of your time and leadership to the organization, the Board, and fellow members. As a Director the decisions you make, along with the actions you take, will affect not only the [name of Chapter], but all of the other NARPM® professionals. As a recognized industry leader you are pledging yourself to a higher standard of conduct and cooperation with all members of our profession. Finally, as a Director of NARPM Monterey Bay Chapter you are expected to endorse and maintain the NARPM® Mission that "NARPM® provides resources for residential property management professionals who desire to learn, grow, and build relationships." Are you ready to accept the responsibilities as a director?

RESPONSE: All parties agree to service through 2022

PLEASE RAISE YOUR RIGHT HANDS:

As directors of [name of Chapter], do you solemnly promise and swear to administer the office to which you have been elected, to the best of your judgment and ability, conforming to the Bylaws of [name of Chapter], observing and enforcing at all times the activities and interest of Monterey Bay Chapter and the Board?

Will you work constantly for the welfare and promotion of the Monterey Bay Chapter and the National Association of Residential Property Managers?