



CHAPTER COMPLIANCE 2023 – DUE MARCH 15, 2023

C012 Monterey Bay

Awarded Chapter in Review/Conditional Compliance 2023 for the following reasons:

- Missing attendance at one Chapter Leader & RVP required call in 2022
- Lack of board meetings held and subsequent minutes
- Lack of election held in 2022.

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.



**CHAPTER COMPLIANCE 2023
ATTENDANCE REQUIREMENTS MET in 2022**

C012 MONTEREY BAY

Compliance Question:

How many Chapter Leader Calls, hosted by RVPs, did the chapter president, or their representative, participate in? Your chapter president, or their representative, must attend at least two of these calls to obtain chapter compliance.

October 11, 2022 Attendee(s): William Sterling

Missing one attended call. No chapter leaders were in attendance at other offered dates: February 8, 2022; May 10, 2022; November 8, 2022; December 13, 2022

Chapter Bylaws Requirements for President and/or President-Elect to attend Chapter Leadership Training at Annual Convention on October 20, 2022 AND/OR Nuts and Bolts Virtual Sessions on November 16, 2022.

October 20, 2022 Attendee(s): **NONE**

November 16, 2022 Attendee(s): William Sterling

Bylaws of
The Monterey Bay 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 Monterey Bay chapter of the National Association of Residential Property Managers, Inc., hereinafter referred to as the Chapter. [REQUIRED]

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 Monterey, Santa Benito, and San Cruz Counties.
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 Monterey, San Benito, and Santa Cruz Counties.

dffgAa

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 Florida.

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

Section D: This chapter's geographical definition shall be: Monterey, San Benito, and Santa Cruz Counties.

ARTICLE II: Membership [REQUIRED]

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 – grandfathered January 1, 2021

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 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 Directors must be approved in order to hold this membership type.

Section G: Company Membership (OPTIONAL)

Company Membership is offered to the responsible individual of the company. In order to hold Company Membership, the company must have four (4) members, which is a combination of Professional and Support members, with two (2) out of the four (4) being Professional members. Additional Professional Members, Support Staff and Associate Members may register under the company for an additional fee. Membership categories under the Company will follow the same eligibility and requirements as outlined above.

Section H: 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 members 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 Monterey Bay 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 members 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: (OPTIONAL)

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 5 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. **[REQUIRED]**
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. **[REQUIRED]**
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.

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. **[REQUIRED]**

- 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 Monterey Bay 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.
- 4. 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.

5. 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 chapter's 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. **[REQUIRED]**

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. [REQUIRED]

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 the 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 75 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 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 Monterey Bay 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 Florida 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 F: Dissolution

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



199N e-Postcard

Confirmation

[Privacy Policy](#)

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 2/6/2023 12:44:05 PM.

Confirmation Number: 226562003710

Entity ID: 2265620
Entity Name: MONTEREY BAY CHAPTER,
 NATIONAL ASSOCIATION OF
 RESIDENTIAL PROPERTY

Account Period Information

Account Period Beginning: 1/1/2022
Account Period Ending: 12/31/2022

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: \$612

This is not an amended return.

An IRS Form 1023/1024 is not pending.

Entity Information

FEIN:
Doing Business As: Monterey Bay Chapter NARPM
Website Address:

Entity's Mailing Address

140 John Street
 Fred Nohr-Treasurer
 Salinas CA 93901

Principal Officer's Information

William Sterling-CEO
 140 John Street
 Fred Nohr-Treasurer
 Salinas CA 93901

Contact Information

Name: Fred Nohr
Phone: 831-422-5614

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.

Print >

Log Out

Copyright © 2023 State of California

**NARPM Monterey Bay Chapter
Annual Financial Statement**

1/4/2023

2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Beginning Balance:	\$ 17,410.76	\$ 16,511.05	\$ 16,261.31	\$ 16,256.59	\$ 16,256.85	\$ 16,303.23	\$ 16,303.50	\$ 15,403.75	\$ 15,404.03	\$ 15,814.29	\$ 15,814.56	\$ 15,339.82	\$ 15,339.82
Deposits													
Membership Dues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Membership Dues - Affiliates	\$ -	\$ -	\$ -	\$ -	\$ 199.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 199.00
Meeting Charges	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training Incentive NARPM Natl (Maintenance)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
NARPM National Chapter Incentive	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 410.00	\$ -	\$ -	\$ -	\$ 410.00
Other:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transfer from prior bank acct	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Refund Leadership Training (offset)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Raffle proceeds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	\$ 0.29	\$ 0.25	\$ 0.28	\$ 0.26	\$ 0.28	\$ 0.27	\$ 0.25	\$ 0.28	\$ 0.26	\$ 0.27	\$ 0.26	\$ 0.25	\$ 3.20
Total Deposits	\$ 0.29	\$ 0.25	\$ 0.28	\$ 0.26	\$ 199.28	\$ 0.27	\$ 0.25	\$ 0.28	\$ 410.26	\$ 0.27	\$ 0.26	\$ 0.25	\$ 612.20
Expenses													
Meeting Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Exec Board Meeting Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Web Site Support and Services	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,800.00
Donations - Community Organizations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
MCAR Chapter Affiliate Membership	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 475.00	\$ -	\$ -	\$ 475.00
Zoom Charges	\$ -	\$ -	\$ -	\$ -	\$ 152.90	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 152.90
Evite Charges	\$ -	\$ 249.99	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 249.99
Sec of State Statement of Info Filing	\$ -	\$ -	\$ 5.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5.00
Leadership Training Reimbursement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bank Service Charge	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Square Service Charge/Refunds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenses:	\$ 900.00	\$ 249.99	\$ 5.00	\$ -	\$ 152.90	\$ -	\$ 900.00	\$ -	\$ -	\$ -	\$ 475.00	\$ -	\$ 2,682.89
Ending Balance:	\$ 16,511.05	\$ 16,261.31	\$ 16,256.59	\$ 16,256.85	\$ 16,303.23	\$ 16,303.50	\$ 15,403.75	\$ 15,404.03	\$ 15,814.29	\$ 15,814.56	\$ 15,339.82	\$ 15,340.07	\$ 15,340.07
	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	

Monthly Procedures:

1. Access bank account online and print out latest activity detail
2. Summarize the daily deposits on the Excel spreadsheet Square tab
3. Access the Square web site and review the daily transactions for the month.
4. Click on transactions to determine the amount received and amount transmitted to Chapter
5. After completing all transactions, summarize on the calendar year tab
6. Ending balance should match the bank statement.



Monterey Bay Chapter

NARPM MBC 2023 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**

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**

**NARPM Monterey Bay Chapter
Annual Financial Statement**

1/4/2023

2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Beginning Balance:	\$ 17,410.76	\$ 16,511.05	\$ 16,261.31	\$ 16,256.59	\$ 16,256.85	\$ 16,303.23	\$ 16,303.50	\$ 15,403.75	\$ 15,404.03	\$ 15,814.29	\$ 15,814.56	\$ 15,339.82	\$ 15,339.82
Deposits													
Membership Dues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Membership Dues - Affiliates	\$ -	\$ -	\$ -	\$ -	\$ 199.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 199.00
Meeting Charges	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training Incentive NARPM Natl (Maintenance)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
NARPM National Chapter Incentive	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 410.00	\$ -	\$ -	\$ -	\$ 410.00
Other:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transfer from prior bank acct	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Refund Leadership Training (offset)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Raffle proceeds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	\$ 0.29	\$ 0.25	\$ 0.28	\$ 0.26	\$ 0.28	\$ 0.27	\$ 0.25	\$ 0.28	\$ 0.26	\$ 0.27	\$ 0.26	\$ 0.25	\$ 3.20
Total Deposits	\$ 0.29	\$ 0.25	\$ 0.28	\$ 0.26	\$ 199.28	\$ 0.27	\$ 0.25	\$ 0.28	\$ 410.26	\$ 0.27	\$ 0.26	\$ 0.25	\$ 612.20
Expenses													
Meeting Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Exec Board Meeting Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Training Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Web Site Support and Services	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 900.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,800.00
Donations - Community Organizations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
MCAR Chapter Affiliate Membership	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 475.00	\$ -	\$ -	\$ 475.00
Zoom Charges	\$ -	\$ -	\$ -	\$ -	\$ 152.90	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 152.90
Evite Charges	\$ -	\$ 249.99	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 249.99
Sec of State Statement of Info Filing	\$ -	\$ -	\$ 5.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5.00
Leadership Training Reimbursement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bank Service Charge	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Square Service Charge/Refunds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenses:	\$ 900.00	\$ 249.99	\$ 5.00	\$ -	\$ 152.90	\$ -	\$ 900.00	\$ -	\$ -	\$ -	\$ 475.00	\$ -	\$ 2,682.89
Ending Balance:	\$ 16,511.05	\$ 16,261.31	\$ 16,256.59	\$ 16,256.85	\$ 16,303.23	\$ 16,303.50	\$ 15,403.75	\$ 15,404.03	\$ 15,814.29	\$ 15,814.56	\$ 15,339.82	\$ 15,340.07	\$ 15,340.07
	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	ok	

Monthly Procedures:

1. Access bank account online and print out latest activity detail
2. Summarize the daily deposits on the Excel spreadsheet Square tab
3. Access the Square web site and review the daily transactions for the month.
4. Click on transactions to determine the amount received and amount transmitted to Chapter
5. After completing all transactions, summarize on the calendar year tab
6. Ending balance should match the bank statement.

ONLINE MEETING – OPEN TO THE PUBLIC

CA LEGISLATIVE UPDATE

Join us as our legislative chair, Jan Leasure, updates us on new laws that could impact real estate management in the new year. This Zoom meeting is open to the public and will be at no cost! Our Monterey Bay NARPM chapter strongly believes in the value of education and knowledge and is providing this meeting as a free service to the property management industry. You do not have to join our organization or pay to attend this meeting. Take advantage of the rare opportunity!

COST - \$0.00

DATE - JANUARY 20, 2022

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

REMOTE TEAM MEMBERS

Join us as we cover content on Remote Team Members.

Joining us will be Matthew Tringali, CEO of Home Vault Academy. This Zoom meeting is open to the public and will be at no cost! Our Monterey Bay NARPM chapter strongly believes in the value of education and knowledge and is providing this meeting as a free service to the property management industry. You do not have to join our organization or pay to attend this meeting. Take advantage of the rare opportunity!

COST - \$0.00

DATE - FEBRUARY 17, 2022

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

2022 FAIR HOUSING UPDATE

Join us as we discuss fair housing updates for 2022.

Our very own Rhonda Navarro will be sharing what she has recently learned to help us navigate changes in fair housing legislation for the new year. This Zoom meeting is open to the public and will be at no cost! Our Monterey Bay NARPM chapter strongly believes in the value of education and knowledge and is providing this meeting as a free service to the property management industry. You do not have to join our organization or pay to attend this meeting. Take advantage of the rare opportunity!

COST - \$0.00

DATE - APRIL 21, 2022

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

HOW TO SIMPLIFY YOUR BUSINESS AND LIFE

KATHLEEN RICHARDS

The one theme that I hear continually with coaching clients is, “I don’t have enough hours in the day...I am so overwhelmed.”

We have all heard the things that we should do to simplify our lives and our business, but why don’t we do it?

This presentation/discussion will focus on how do we actually make real and sustaining changes to live a less stressed and more productive and happier life.

COST - \$0.00

DATE - MAY 19, 2022

TIME - 12:00 PM – 02:00 PM

ONLINE MEETING – OPEN TO THE PUBLIC

PROFIT LEVERS: HOW TO CONTROL THE 5 AREAS OF BUSINESS MASTERY TO SCALE PROFITS RELIABLY

If you're like most PMs, you're probably putting a lot of time and effort into running a profitable business, but sometimes you feel like you're just spinning your wheels instead of scaling your business. While some PMs believe the only way to increase their profits is to add more doors, that's simply not the case - growth is just one of the five profitability levers that could make or break your profits! Learn how to model your financial future after the top 1% in PM.

COST - \$0.00

DATE - JULY 21, 2022

TIME - 12:00 PM – 02:00 PM

NARPM Monterey Bay Chapter Meeting Agenda

November 17, 2022

1. 11:50 Guests and members mingle
2. 12:00 Welcome everyone and read: Mission and Vision:
M: NARPM provides resources for residential property management professionals, who desire to learn, grow and build relationships.
V: NARPM will be recognized leaders in the residential property management industry.
3. Antitrust Statement:
It is the policy of NARPM to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs), individual competitors or specific business transactions, or controlling or allocating markets. Further, NARPM shall not restrict members' ability to solicit competitors' clients or to advertise for business in any way that is not false, deceptive or otherwise illegal.
4. 12:05 Allow Vendors an introduction:
Brent Calvin: DKS
5. 12:07 Allow new members an introduction:
6. Code of Ethics – Article 3

ARTICLE 3: RESPONSIBILITY TO CLIENT

The Property Manager shall serve the Client and act in the best interests of the Client.

STANDARDS OF PROFESSIONALISM

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

7. 12:15 Introduce Tanner

8. Adjourn



STATEMENT

Minutes are not available for the 2022 calendar year because there was not once a quorum of officers. Since we were not holding in-person meetings, I attempted to hold virtual meetings and, each time, only one other member would attend. No business could be conducted without a quorum so we were not able to hold any official board meetings. Now that we've held an in-person general meeting we should be able to hold board meetings again.

William Sterling
President

#91

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, February 08, 2023 4:41:35 PM
Last Modified: Wednesday, February 08, 2023 4:43:30 PM
Time Spent: 00:01:54
IP Address: 104.6.124.21

Page 1: Positions with a * are REQUIRED

Q1

Chapter Name

Monterey Bay

Q2

Chapter President*

William Sterling

Missing President Elect name! Not complete! William Sterling (23 President) cannot hold President and President-Elect position. Please submit a new name for President Elect.

Q3

President Elect*

William Sterling

Q4

Past President*

Rhonda Navarro

Q5

Respondent skipped this question

Vice President (if applicable)

Q6

Treasurer*

Fred Nohr

Q7

Secretary*

Audrey Wardwell

Audrey L. Wardwell (23 Secretary) is not an active member. Audrey must pay dues in order to be listed as an active member again. Audrey is unable to hold this position or vote on board matters until membership is active.

Q8

New Member Mentor* In June 2020, NARPM National adopted the motion that all chapters are required to identify a New Member Mentor for their chapter each year. It is not an elected position, but is a duty that a volunteer member or board member should be completing. The program is in the Chapter Success Guide, starting on page 148.

Carrie Appling

Q9

Education Chair

Carrie Appling-Lake (23 Membership Chair and 23 New Member Mentor) is not an active member. Carrie must pay dues in order to be listed as an active member again.

Q10

Membership Chair

Carrie Appling

Q11

Legislative Chair

Jan Leasure

Q12

Other position(s) not listed

Respondent skipped this question



STATEMENT

Elections were not officially conducted in 2022 because I couldn't get commitments from any of the existing officers. Three of the other officers attended our first in-person general meeting in April and I anticipate being able to get back on track in 2023.

William Sterling
President