

Strategy Meeting Notes

December 19, 2017 at Deerwood Country Club

Attendees: Dawn Conciatori, Mario Gonzalez, Greg Kinzer, Cindy Morgan, Phil Scarborough, Tripp Williams

Tagline for 2018: Growth

Education Ideas for the Year:

- Piggy-back on NARPM speakers that do the “Florida circuit” (i.e., Jim Roman in Tampa).
- “Culture Index” - How to hire right
- Artificial Intelligence - How to successfully interface with different communication styles
- Disaster Preparedness (May?) - speaker from JaxReady / City of Jacksonville Dept.
- Basic Business Practices for a Successful Business - Find a Speaker (SCORE?)

Committee Chair Suggestions

- Eric Boyd for Education Co-Chair
- Starlett Jackson for Membership

New Member Outreach & Retention:

- Assign board member to “shadow” new member/guest and introduce them around and show them how things work
- Mario will take point on this task as assistant to Membership Chair.

Operations Manual (Policy & Procedures): Our by-laws say “what” we should do but we need a manual for “how” in order to assure continuity and that nothing is missed.

- Mario will contact Joel Elliot of Atlanta to request that they share their P&P for a guide.

Chapter Success Guide: Available on NARPM.org. Sign in as member. Look under “Member” tab. Guide is toward the bottom under “Tools”.

January 12, 2017

NARPM Meeting

Call to order 9:10 am Ed Mercel Motioned Dawn Conciatori 2nd

Present: Dawn Conciatori, Greg Kinzer, Cindy Morgan, Erin (Alterman) Morgan, Philip Scarborough, Jackie Sullivan, Tiera Vincent, Ed Mercel, Shelby Heinemann, Mario Gonzales and Tripp Williams.

Introductions: why you joined and fact that no one knows about you. We have a well, rounded, interesting group... survivors, Olympians, movie stars, other business owners, athletes, authors, care takers,

Strategic Overview:

President and President Elect to go to Leadership in November in St Louis. Lots of NARPM info. NARPM mission- to provide recourse to learn and grow and build relationships. Vision- NARPM will be the recognized leader of Property Management. Think about a Mission and Vision for our Chapter. Committee's rule- bringing on new board members. Look at your Roles and Responsibilities in your binder.

President Report:

Mario was on a board with Bart, Brian, and Steve. They are ready to help and grow our Chapter. Nationals put training into place. Florida is put on a higher level- designation classes planned. Our State conference is measured by all others. State in Tampa and Nationals in Orlando. Strong leadership in Nationals. State and Regionals is well connected. Board should be set by September.

Treasurer Report:

2016- \$35,410.00

2017- \$35,337.32

Membership Report: Our Chapter membership is at 94.

Hospitality: Everything is ready for next week's chapter luncheon. Not space available in October or December. Will need to lock in December, if wanted. October Deerwood is not available. Make sure vendor tables are available. Increase of price of \$2 per plate.

Affiliates: \$6800 collected to date. A few affiliates are upgrading. New carpet affiliate A&C Carpet Cleaning approved.

REBar: all set for time slots. \$50 gift card for drawing. Tiera will be at the table next to us to help.

January 19th Luncheon:

Many PM topics, divide and concur. Chairs in a row up front.

- Jackie will host
- Auditing Phillip
- Vendor Relations Greg
- Tech and gadgets Shelby Propertyware,
- Social media Mario
- Risk mediation Tripp
- Legal updates Dawn
- Trends in PM Dawn
- Business development/Education Designation Mario and Tiea

Email to Dawn bullet your points for power point.

Education: Phillip and Dawn started list.

- Ideas are Stacey McKay CE Credits "When owners say sell" March.
- Four ½ about Yelp and social media reviews.
- Someone from FL Board.
- "Speed dating" in **February** meeting with affiliates- make sure affiliate paid.
- Todd Breen April or May Video workshop, Top 7 trends in PM, Outsourcing, etc.
- Designation class
- Designation class Personal Procedures Advanced then Harry and Tradeshow next day in **July**
- Common E&O mistakes
- Mock Trial
- EPA certification class
- Retirement accounts to buy investment properties
- Dale Westling Service animals

Survey on tables with questions about what PM's would like to learn this year.

General Discussion: Still owe Stacey for last year's presentation. National education just have Chapter Pres call, FL Conference group call. ALL UNITED!

GOALS 2017:

Bring 3 non NARPM PM's

Adjournment: First by Cindy Morgan, seconded by Mario Gonzalez, the Board adjourned at 11:27 am.

Shelby Heinemann, Secretary

President Cindy Morgan

President-Elect Philip Scarborough

Secretary Shelby Heineman

Treasurer Tripp Williams

Past President Mario Gonzales

February 9, 2017

NARPM Meeting

Call to order 9:04 am Ed Mercel Motioned Cindy Morgan 2nd

Present: Greg Kinzer, Cindy Morgan, Erin (Alterman) Morgan, Philip Scarborough, Jackie Sullivan, Tiera Vincent, Ed Mercel, Shelby Heinemann, Mario Gonzales and Tripp Williams.

Committees:

We do not have -

Designation committee - only small amount of members have designation - help NARPM members go to convention

Marketing and Publications - similar to Membership - more with social media - we will need to share posts - videos - Phil and Erin look at ways to broaden this.

Recognitions - recognizing new members and vendors via Facebook and a mtg

Tradeshow - small committee for planning - think of a theme - start discussion in

March - Designation class July 20th Harry Heist Tradeshow July 21st

Joel Elliot will visit - confirmed for April mtg

Florida State chapter conference call will start discussing planning the conference - Mario will be on call. Think about co-chairing - one call per month

Calendar to share with board - can be added to the Google Drive that Phil just emailed.

Treasurer Report:

Current balance approx. \$44,000

We purchased new swippers

Mario went to teach at Daytona. Place business card in fishbowl at every luncheon meeting. Cindy motioned to create a yearly drawing for attendees that attend the NARPM luncheon. A business card will be drawn later in the year to pay NARPM membership, registration for National Conference and credit toward a CE class up to \$200. Phil second the motion. All yes- motion carried.

Membership Report: Our Chapter membership is at 93.

Encourage meeting attendance. Erin will be emailing a list of members to split and each board member will call and/or text their list and personally invite them to next week's meeting.

Hospitality: All good

Affiliates: Flooring, Garage Door, pool service, Property management payment tracking did not renew. Three new affiliates 2 pest companies and roofing company to vote on. All in favor- all went through.

February 16 Luncheon:

Speed Dating-
Dawn announcing

Education: Phillip discussed Google Doc.

March Stacy McKay- owner decides to sell- can we change it to Trust Liability?

April Joel Elliot

June Open

July Harry Heist

August Open

September Open Also FL State

October No mtg - Conference

November Open

PM Growth summit in Palm Beach- Phil said it was awesome!

General Discussion: Video- post monthly for our meetings – reading flip paper video about property – target Real Estate companies – Mario and Phil are going to brainstorm ideas.

Adjournment: First by Phil, seconded by Cindy, the Board adjourned at 10:22 am.

Shelby Heinemann, Secretary



The board will be selecting new boards members for 2018 at our board meeting on August 11th 2017. If you have any interest in participating, please contact Mario Gonzales about becoming a board member or chair!

Thank you,

Sincerely,

Northeast Florida Association of Residential Property Managers
904-777-4526

10450 San Jose Blvd. Suite 1
Jacksonville, FL 32257

See what's happening on our social sites



Northeast Florida Association of Residential Property Managers | 1059 Beach Blvd. , Jacksonville
Beach, FL 32250

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Sent by mario@navytonavy.com in collaboration with

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Department of the Treasury
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2017

Open to Public Inspection

A For the **2017** Calendar year, or tax year beginning **2017-01-01** and ending **2017-12-31****B** Check if available☐ Terminated for Business☒ Gross receipts are normally \$50,000 or less**C** Name of Organization: **FLORIDA ASSOCIATION OF
RESIDENTIAL PROPERTY MANAGERS INC****10450 San Jose Blvd.
Jacksonville, FL, US, 32257****D** Employee Identification
Number **59-3512309****E** Website:**F** Name of Principal Officer: **Walter L Williams****10450 San Jose Blvd.
Jacksonville, FL, US, 32257**

Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

3:00 PM
02/06/18
Cash Basis

NEFARPM Profit & Loss Budget Overview

Ordinary Income/Expense	
Income	
600 · NEFARPM Dues	
602 · Affiliate Member Dues	16,455.21
600 · NEFARPM Dues - Other	-1,701.26
Total 600 · NEFARPM Dues	14,753.95
625 · Chapter Grants	
626 · NARPM Grants	1,220.00
Total 625 · Chapter Grants	1,220.00
630 · Monthly Luncheon Revenue	
50-50 Revenue	255.00
631 · Meal Revenue	1,058.22
630 · Monthly Luncheon Revenue - Other	5,945.98
Total 630 · Monthly Luncheon Revenue	7,259.20
635 · Program Revenue	8,500.00
Total Income	31,733.15
Expense	
700 · Monthly Program Expenses	
701 · Meeting Room	10,822.94
703 · Printing Costs	233.77
704 · Travel and Hotel and Food	190.97
707 · Speakers Gifts	149.15
711 · Equipment	12.84
Total 700 · Monthly Program Expenses	11,409.67
725 · Special Programs	
726 · Meeting Room	353.07
730 · Special Program Food costs	9,329.04
731 · Speaker Fees	251.64
732 · Speaker Gifts	240.75
733 · Equipment	69.54
725 · Special Programs - Other	-250.00
Total 725 · Special Programs	9,994.04
750 · Aff Appreciation Trade Show	
753 · Gift Baskets	105.21
Total 750 · Aff Appreciation Trade Show	105.21
855 · Advertising expenses	3,417.16
882 · Education	511.70
899 · Licenses and Annual Returns	61.25
Total Expense	25,499.03
Net Ordinary Income	6,234.12
Net Income	6,234.12



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

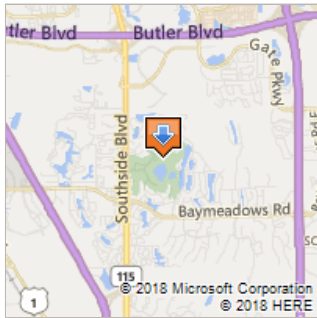
When

Thursday, January 19, 2017 from 11:30 AM to 1:30 PM
EST

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Mario Gonzalez
NARPM of Northeast Florida
mario@navytonavy.com

Top 10 topics to Kick Off a Successful 2017!

Join us for the top 10 important topics and trends for 2017 including Technology, Gadgets, Audit Proofing, Education, Social Media, Risk Management and more!

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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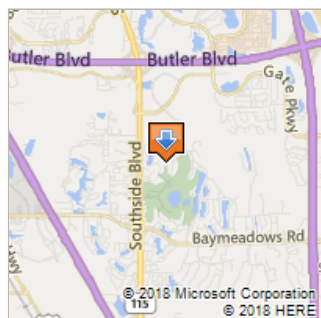
When

Thursday, December 7, 2017 from 11:30 AM to 1:30 PM
EST

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Dawn Conciatori, NARPM Northeast FL
NARPM of Northeast Florida
dawnc@rdcres.com

Holiday Celebration Lunch & End of Year Wrap Up!

You are cordially invited as our guest for lunch to join your NARPM Board for a Holiday Celebration and End of TheYear Wrap Up. Please join us for good fun, good company and Holiday cheer!
Donations appreciated for the 5-Star Veterans Center.

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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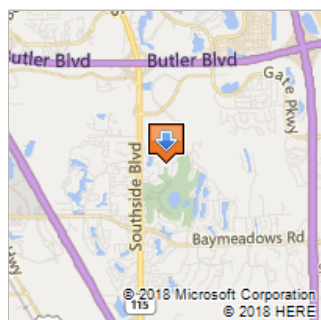
When

Tuesday, November 7, 2017 from 9:00 AM to 4:30 PM
EST

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Dawn Conciatori, NARPM Northeast FL
NARPM of Northeast Florida
dawnc@rdcres.com

NARPM Northeast FL Annual Trade Show with Featured Speakers

Don't miss the NARPM Northeast FL Annual Trade Show with featured guest speakers Stacey McKay and Wally Conway. Visit and mingle with our NARPM Affiliates throughout the day with a chance to win a \$500 cash prize and many other give-aways. See you there!

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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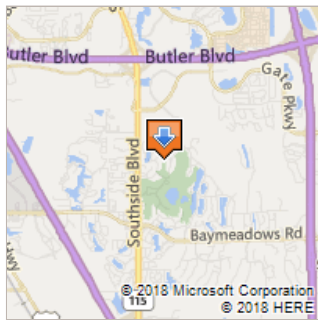
When

Thursday, August 17, 2017 from 11:30 AM to 1:30 PM
EDT

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL
NARPM of Northeast Florida
philip@eliterealtygroup.com

When DBPR calls, Are You Ready?

Come learn tips directly from DBPR Investigator(s) Are you compliant? What happens during an office inspection? Living through a DBPR audit. How to protect your license! All followed by Question and Answer period.

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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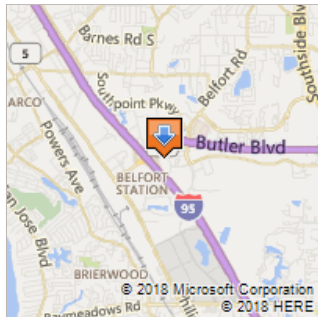
When

Friday, July 21, 2017 from 9:00 AM to 4:00 PM EDT

[Add to Calendar](#)

Where

Jacksonville Marriott
4670 Salisbury Road
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL
NARPM of Northeast Florida
philip@eliterealtygroup.com

6 Hours Property Management Law by Harry Heist

This comprehensive class will give you 6 CE Credits and will provide you with over 200 pages of free handouts, as well as information from Application to Eviction and everything in between.

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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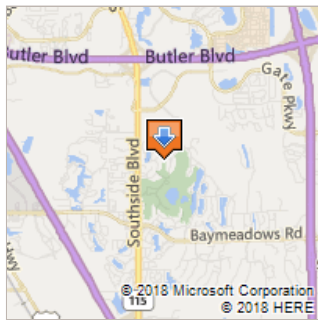
When

Thursday, June 15, 2017 from 11:30 AM to 1:30 PM
EDT

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL
NARPM of Northeast Florida
philip@eliterealtygroup.com

Maximizing Your Profits in Property Management

Come hear from a PANEL OF EXPERTS on Maximizing your Profits from both large and small companies. Learn from their real life experiences on how they started their companies to how they achieved their current successes and deal with failures. Find out how to "make it happen" and how to avoid or remove the obstacles and pitfalls.

Registration is closed. This event has already been held.



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

When

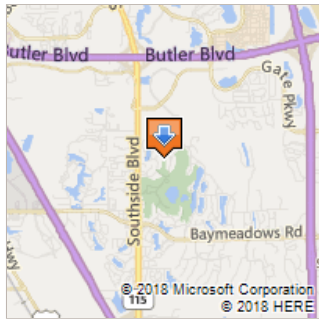
Thursday, May 18, 2017 from 11:30 AM to 1:30 PM EDT

[Add to Calendar](#)

Where

Deerwood Country Club

10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL

NARPM of Northeast Florida

philip@eliterealtygroup.com

Top 7 Emerging Trends in Property Management

Top 7 Emerging Trends in Property Management - Get an advance look at the latest industry trends shaping the future of our industry, complete with examples of how forward-thinking agencies are setting the pace in the USA and Australia. Learn how new technology and innovation are changing our customer's expectations.

Registration is closed. This event has already been held.



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

When

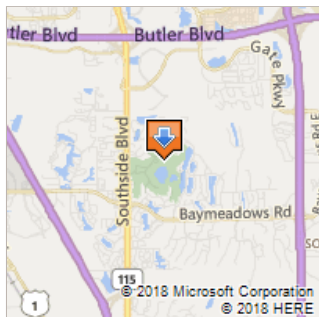
Thursday, April 20, 2017 from 11:30 AM to 1:30 PM EDT

[Add to Calendar](#)

Where

Deerwood Country Club

10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL

NARPM of Northeast Florida
philip@eliterealtygroup.com

NARPM Northeast FL - Using NARPM to Stay Competitive!

Come hear from Joel Elliott, our NARPM Regional Vice President / CEO and Sr. Property Manager of one of the top Property Management Companies in Georgia. As CEO, Joel oversees the operations of all Brokerage and Property Management services for EW Capital Management, known as one of Atlanta's major Property Management Companies.

Registration is closed. This event has already been held.



National Association of Residential Property Managers
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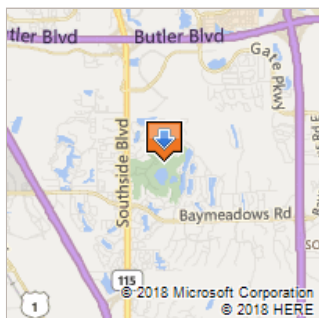
When

Thursday, March 16, 2017 from 11:30 AM to 1:30 PM
EDT

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL
NARPM of Northeast Florida
philip@eliterealtygroup.com

Collections 101 - What Every Property Manager Should Know

Do you really know the "right thing to do" when it comes to Collections? Come learn from two local experts, Nancy Maggiore, Broker REALTY SELECT SERVICES, LLC and Jeffery M. Wilkins, Esq. Wilkins Law Firm, on all aspects of late paying or dead beat tenants. Should you report them to the credit bureaus?

Registration is closed. This event has already been held.



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

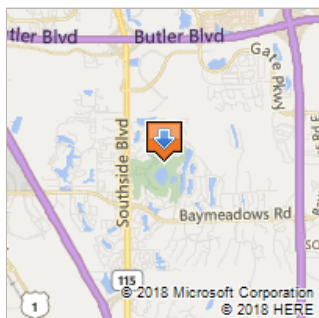
When

Thursday, February 16, 2017 from 11:30 AM to 1:30 PM
EST

[Add to Calendar](#)

Where

Deerwood Country Club
10239 Golf Club Dr
Jacksonville, FL 32256



[Driving Directions](#)

Contact

Phil Scarborough, NARPM Northeast FL
NARPM of Northeast Florida
philip@eliterealtygroup.com

Speed Dating for Property Managers Feb 2017 Meeting

While our vendor affiliates “woo” you with what they have to offer, you’ll get the chance to ask them how they intend to satisfy your “needs!” Okay, relax everybody this is property management after all. The vendors will go to each table for a 2 minute commercial and then you get to pepper them with questions and let them know what you need.

Registration is closed. This event has already been held.

**National Association of Residential Property Managers
of
Northeast Florida
Jacksonville, Florida**

MINUTES OF THE BOARD

July 10, 2017

Call to Order: President Mario Gonzalez called the meeting to order at 12:44 pm at the offices of First Place Property Management, 10365 Hood Road South, Jacksonville, Florida.

Present: Dawn Conciatori, Michael Hodges, Mario Gonzalez, Cynthia Morgan, Philip Scarborough, Jackie Sullivan, Tiea Vincent and Tripp Williams.

Update on Committees:

- Legislative - Michael Hodges reported that he is preparing for next year's Day on the Hill agenda and urged attendees to reach out to their local state representative and introduce themselves as an expert in property management. Also, Michael is looking for a co-chair to train.
- Designation - Tiea Vincent will contact those in the upcoming designation class to see if anyone needs help achieving their designation.
- Trade Show - Cindy Morgan will chair the trade show committee with the assistance of Jackie and Dawn.

New Board Members: The board discussed the importance of bringing in new co-committee chairs and committee chairs to groom them for future board positions. Lisa Schunemann and Debbie Jones have indicated an interest in volunteering.

President's Remarks: Our chapter's RVP, Joel Elliot, has asked Mario to prepare a written update of where the chapter is and what the chapter is planning for the future. Joel would also like to see a slate of the 2018 board.

Treasurer's Report: Tripp shared that we are in good shape with enough funds in the bank to cover the cost of the designation class, Harry Heist and the trade show.

Minutes: Tabled until the next meeting.

Education: Dawn is working on a speaker for August -- hoping for Dale Westling but he may be in trial. As an alternate, a speaker from DBPR. Dawn is also working with Stacey McKay to help her get CE certified in order to do a CE class in Trust Accounting for the trade show. In addition, afternoon speakers could be Preston Oughton, an HOA attorney, and a speaker on lead based paint.

Trade Show: Trade show wish list: September 21 at Deerwood Park. Stacey McKay for 3 hour CE class in the morning, lunch & mix/mingle with affiliates for an hour, then two exciting speakers followed up by the wrap-up and prize give-aways. Jackie will contact Deerwood about the availability of the venue. Dawn is working with Stacey and the speaker slate.

No October Meeting: Due to Nationals being in Orlando (YAY!), there will be no regular lunch meeting of the Chapter.

Designation Class: We have enough for the class to go forward. Jackie will confirm number of attendees with Mario and inform Michael Fleet of the Marriott. Coffee service to last throughout the day; box lunch. The instructor is making his own lodging arrangements.

Harry Heist Class: All is in place --

- Jackie will
 - Inform Marriott of number attendees and Classroom style seating
 - Three (3) registration tables in front
 - Two (2) handout tables in front
 - One (1) table for breakfast items
 - She will discuss an upgrade of lunch options with Michael Fleet
 - Confirm coffee service throughout the day and ask for plates, utensils and napkins for breakfast and tubs of ice for yogurt & bananas
 - Reach out to PuroClean for lanyards; reach out to MasterCraft for bags (but do we need bags for this class?)
- Tiea will
 - Inquire of Harry about donation to his foundation
 - Procure breakfast items from Sam's
- Cindy will
 - Print name tags and registration sheets (in alpha order!)

We need to wrangle volunteers: three (3) for registration and two (2) for hand-outs.

Adjournment: First by Mike, seconded by Tripp, the board adjourned at 1:50 pm.

Respectfully submitted,
Cynthia Morgan

April 13, 2017

NARPM Meeting

Call to order 9:29 am Phillip Scarborough Motioned Cindy Morgan 2nd

Present: Greg Kinzer, Cindy Morgan, Philip Scarborough, Jackie Sullivan, Tiea Vincent, Ed Mercel, Shelby Heinemann, Mario Gonzales and Tripp Williams.

Legislative Chair- Michael Hodges offered to hold the position. Cindy Morgan motioned to have Michael hold the chair and Tripp 2nd and everyone agreed.

Committees:

Designation committee -NARPM members go to convention

Marketing and Publications – similar to Membership – more with social media – we will need to share posts – videos – Phil and Erin look at ways to broaden this.

Recognitions – recognizing new members and vendors via Facebook and a mtg

Tradeshow – Designation class day before, Mixer that night.

March - Designation class July 20th Harry Heist Tradeshow July 21st. Add Save the Date for Designation and Tradeshow.

Treasurer Report:

Current balance approx. \$45,900

Helped having Harry and Trade Show together which was \$7-8k

Membership Report: Erin was not in attendance- Mario filled in, membership in the 90's. Member at Large issue and NARPM

Hospitality: Speaker set for next week- ask about dinner the night before Wednesday, April 19th. Will email where dinner will be.

Affiliates: Turn-key construction and specialize in roofing. All in favor- all went through.

Education:

April Joel Elliot

May Todd Breen

June Open

July Harry Heist

August Open- DBPR?

September Open Also FL State
October No mtg - Conference
November Open
December NARPM Party- Casa Marina

General Discussion:

Adjournment: First by Cindy, seconded by Dawn, the Board adjourned at 10:18 am.

Shelby Heinemann, Secretary

March 9, 2017

NARPM Meeting

Call to order 9:05 am Cindy Morgan Motioned Philip Scarborough 2nd

Present: Greg Kinzer, Cindy Morgan, Erin (Alterman) Morgan, Philip Scarborough, Tiea Vincent, Shelby Heinemann, Mario Gonzales and Tripp Williams.

New Board member possibilities-

Lisa Schunaman

Who would you know?

Look at other PM companies to invite to our meetings

Committees-

Chapter Excellence ---

Earn extra points for chairs and sub chairs for

Cindy will work on this with Tiea V and find some helpers to gather information

-Designation Chair: Tiea Vincent will start

Presidents Report-

Nationals report will be today

Treasurer Report:

Current balance approx. \$47,000

Looking good. We have more sponsorships coming in.

Look at a check and balance person to double check the account. An admin user to the account.

Membership Report: Our Chapter membership is at 95.

Reach out to the At Large members.

Fishbowl – put card in at every meeting attended and pull for Nationals and Membership

Hospitality: All good

Affiliates: 2 new apps- Junk King and Jax Home Maintenance – Cindy Morgan motioned for both sponsors and Philip S 2nd, all approved.

Lunch sponsorships are set for the rest of the year meetings.

Education: Phillip discussed Google Drive again

March Jeff Wilkins & Nancy Maggoirie

April Joel Elliot and Todd Breen
June Open
July Harry Heist
August Open
September Open Also FL State
October No mtg - Conference
November Open

Adjournment: First by Phil, seconded by Cindy, the Board adjourned at 10:20 am.

Shelby Heinemann, Secretary