

2013

CHAPTER HANDBOOK





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REAA will provide and maintain a Chapter Handbook for the benefit of all Chapters. The Chapter Handbook will provide information regarding the REAA operations and other items of interest to the Chapters.

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1.0 Introduction and Chapter Formation

This Handbook provides guidelines and is a reference; it is not a rule book or a how to manual as each chapter will need to assemble and conduct itself with available resources in a manner that is beneficial to the local membership and compliant with the REAA by Laws.

The mission statement is at the core of Chapter structure. “Our mission is to promote the appraisal profession and our membership through education, networking and mentoring for professional development, with dedication to the highest ethical standards of appraisal practice.” There are solutions for each chapter functions regardless of size.

1.1 Use of the REAA name, Acronym, Logo, and other proprietary materials.

The name "Real Estate Appraisers Association" and the seals and logos used in connection therewith are the trademarks of the Corporation. The use of these trademarks by the Chapter is governed by the Trademark License Agreement executed by the Chapter and the Corporation, the terms of which are incorporated into the bylaws of the Association.

1.2 Resource

REAA Corporate has a single point of contact as a liaison between Chapters and Corporate.

1.3 Naming Your Chapter

The name of our organization is the Real Estate Appraisers Association (REAA). Each Chapter operates under the authority of the Real Estate Appraisers Association, Inc. (referred to as "the Corporation") the Association is a Not-For-Profit Corporation. The suggested name for a Chapter would be” The Real Estate Appraisers Association-(Your City) Chapter”

1.4 Phone Number and Address

It is important that each Chapter establish a Chapter address and phone number. Generally a post office box works well for an address as different Board members may have access to the PO Box. Some chapters have purchased an 800 phone number that can be assigned to a member to receive calls for that month or quarter or however long the Board may decree.

1.5 Marketing your Chapter

There are many ways to market your Chapter. A brochure mailed out to the appraisers and others you may want to invite into your Chapter has been successful to other chapters. A copy of brochures is located in the Addendum. These brochures can be mailed using the OREA mailing list, which can be purchased directly from OREA's website.

Meeting flyers announcing the current meeting topic and class is another marketing tool. A sample of meeting flyers is located in the addendum.

1.6 Resources for Networking and Communicating with Chapters and Corporate

The REAA website offers opportunities for the Chapters to network with the members of the local Chapters as well as the other Chapters. Each Chapter will develop their own web page and is responsible to maintain the content. Each Chapter will have representation with the Corporate Board and the Corporate Board has a Chapter Liaison Board member as a contact between the Chapter Board and the Corporate Board.

1.7 Dissolution of the Chapter

Dissolution of the Chapter will be in accordance with the by-laws Section 901.

2.0 Setting up the Legal and Financial Structure for a Chapter

2.1 What is a Chapter Charter?

A Chapter Charter is a written agreement between REAA Corporate and the individual Chapter that wants to join together to pursue their mutual interests under the auspices of the REAA. The Chapter Charter provides the basis of operation within the interests of the Association and the Association's purpose and provides the Chapter with a resource noting the support, assistance, and the communication available to the Chapter from Corporate. All Chapters are considered separate independent entities, with each Chapter structure determined by the needs of the members. Every Chapter will state its purpose is to be a not-for-profit organization. Incorporation of the Chapter is not required.

2.2 How is an REAA Chapter Formed?

The beginning process requires meetings with members of the Corporate Board. Chapters are formed when a group of Appraisers in good standing with their state regulatory agency present a written petition to the REAA Corporate Board of Directors requesting Chapter status. The Corporate Board will meet and discuss the petition. There will be a required minimum of 10 members' names on the petition, and that there are no conflicts with nearby Chapters, such as a geographical area already served by an existing Chapter. The Corporate Board will make the final decision on any new Chapter formation.

2.3 Chapter Liability

The Chapter shall be fully and solely responsible for its own legal and financial affairs, and shall hold harmless the Corporation, by reason of its affiliation, from any lawsuits, damages, other expenses or liabilities arising out of the activities of the Chapter.

2.4 Corporation Liability

The Chapter shall not be responsible or liable for any lawsuits, damages, other expenses, or liabilities arising out of the activities of the Corporation.

2.5 Non-liability of Directors; Indemnification

The Directors shall not be personally liable for the debts, liabilities, or other obligations of the Chapter. The Chapter Board of Directors and Officers of the Chapter shall be indemnified by the Chapter to the fullest extent permissible under the laws of this jurisdiction.

2.6 Liability Insurance

The Corporation may procure liability insurance for the Chapter, and the Chapter agrees to pay all reasonable premiums for such insurance.

2.7 Disputes

In any disputes, the Corporation is the final authority

2.8 A Not-for-Profit Corporation

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A Not-for-Profit corporation is a corporation formed pursuant to the Not-for-Profit Corporation Law. Not-for-Profit Corporation Law Section 201 (Purposes) provides a list of general purposes for which a not-for-profit corporation may be formed. A nonprofit corporation is a corporation formed to carry out a charitable, educational, religious, literary or scientific purpose. A nonprofit can raise funds by receiving public and private grant money and donations from individuals and companies. Certain federal, state, and local income, property and sales tax exemptions are available to nonprofit corporations. The federal and state governments do not generally tax nonprofit corporations on money they make that is related to their nonprofit purpose, because of the benefits they contribute to society.

2.9 Internal Revenue Code Section 501(c) (6) status of a Chapter Performing Particular Services

An organization's performance of particular services for its members or others is not an exempt activity under Code section 501(c) (6). Although such activities do not alone preclude exemption, an organization engaged primarily in performing particular services is not exempt under section 501(c) (6).

Examples:

Advertising that carries the names of members may be performing particular services; but promoting the business of an industry by encouraging the use of its products is not. Furnishing particular information and specialized individual services to members through publishing and other means to affect economies in business operations may be performing particular services; but educating members on how to improve their business results is not.

Providing insurance coverage often involves performing particular services. Similarly, negotiating discounted healthcare or similar services for members and/or nonmembers and providing related services may be performing particular services.

To meet the requirements of IRC 501(c) (6), an organization must possess the following characteristics:

1. It must be an association of persons having some common business interest and its purpose must be to promote this common business interest;
2. It must be a membership organization and have a meaningful extent of membership support;
3. It must not be organized for profit;
4. No part of its net earnings may inure to the benefit of any private shareholder or individual;
5. Its activities must be directed to the improvement of business conditions of one or more lines of business as distinguished from the performance of particular services for individual persons;
6. Its primary activity does not consist of performing particular services for individual persons; and
7. Its purpose must not be to engage in a regular business of a kind ordinarily carried on for profit, even if the business is operated on a cooperative basis or produces only sufficient income to be self-sustaining.

2.10 Federal Tax Number (EIN) Information

Corporate holds the EIN number for the Association. This is the number that is used to file the corporate income tax. It is like a social security number for individuals. The EIN is required when the chapter establishes a local bank account to for a chapter.

2.11 Suggestions for setting up a bank/checking Account

Once a new chapter has its signed Chapter Charter, the new chapter will need a local account to deposit receipts and have a checking account to pay for expenses related to Chapter operations. The basic steps are:

1. Choose a bank and present to Chapter board for approval
2. Signatures authority: Treasurer; and/or President or Secretary
3. Call bank and set up an appointment to open up an account

Ask them what documentation they require.

Advise the bank that REAA is a Non-Profit California Corporation operated exclusively for charitable and educational purposes under Section 501(c) (6) of the Internal Revenue Code.

4. Typical documents required to open an account
 - a) Minutes from meeting stating (**treasurer name**) has been elected as Treasurer of the Chapter.
 - b) Chapter mailing address and phone number.
 - c) Approximate annual budget and initial deposit.

Treasurer's duties hand out, and a new bank account set up guide are part of the appendix.

2.12 Financial Management and Record Keeping Criteria

The chapter treasurer will be responsible for the maintenance of the Chapter bank account and compliance with REAA policies that are detailed in the Treasurer's duties. A treasurer's guide that provides more detail is in the Appendix.

1. REAA Cash Control Policy
2. REAA Standardized chart of accounts
3. REAA Quicken policy
4. REAA Chapter and Corporate reporting requirements

2.13 Management of Chapter Membership Funds

New members and members that wish to renew, are encouraged to sign up on line to accurately post to the Chapter roster and handle funds more efficiently.

On line membership and class sign ups at www.reaa.org, select the chapter.

Class sign ups should be on line, the use of the on line sign up function supports efficiencies in the generation of class rosters, certificate printing, class size and event service planning. The check in desk should be prepared for walk-ins.

The REAA cash control policy stipulates regular deposits should be made with a list of members, amount paid and forms of payment as a record retained by the Treasurer. All expenses should be supported by receipts and a reimbursement request approved by the board.

3.0 Benefits of Membership

3.1 Education

The mission of REAA is to provide a platform for educational enrichment to the members of the Association in the form of Continuing Education Classes provided at the meetings in a two (2) hour CE format as well as, providing other classes that would be of interest and/or those classes fulfilling the requirements



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for continuing educational licensing renewal. The educational classes are timely, and provide the members, as well as others, with a better understanding of issues in the appraisal industry to further enhance the memberships understanding of those issues and/or procedures that would allow better performance by the appraiser to produce a better product for the intended users of their services, thus providing a service to the public at large.

3.2 Designation

The designation associated with a professional association has long standing in the appraisal industry. It displays a commitment by the holder of the designation to excellence in the profession by going beyond the required for licensing to an in-depth understand of the basic nature of the appraisal and all the factors that go into the determination of a “value”. REAA is currently in the process of finalizing the REAA professional designation of “Master Appraiser” for those qualified members of REAA.

3.2 Newsletter

REAA has a newsletter that conveys the goals and developments within the Association. Chapters are represented within the newsletter with articles of interest to the Association members as well as others. This is an ongoing process of development to better the newsletter and Chapters are expected to offer submissions that may be of interest to their local membership as well as the membership at large.

3.3 Website

The REAA website projects all the Chapters events and calendars as well as the membership rosters, educational classes from Chapters as well as those classes offered by REAA Corporate. The newsletter is included in the website. This can be an additional marketing tool. Chapters will have the ability to control their input on their individual page(s).

3.4 Networking

One of the most valuable features of the Chapter meetings are the networking and resource sharing opportunities during meetings, classes and social time. We encourage members to communicate with each other to share experiences, catch up on local events that impact valuation and just check in with each other. Many referrals, resources and ideas are shared with peers during meetings. It’s our hope that solutions are found and successes shared for the benefit of all.



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Networking basics: Wear your name tag, bring your business cards, and let others know your specialties. If you get a referral, return the favor.

4.0 Chapter Membership

4.1 REAA Membership Requirements

Membership of an appraiser in REAA requires a good standing with the state regulatory agency. Applicants for membership in REAA must complete an application for membership form showing compliance with standards and requirements for that particular class of membership. An application with dues payment is submitted to the membership chairperson or other assigned Board member. That person checks with the state regulatory agency to determine appraiser's status with the agency. All membership applications shall be reviewed and a vote for approval taken in the executive session of the regular scheduled Board meeting. The new member should be announced at that general meeting.

4.2 Chapter Membership Classifications

1. Member

This classification is open to all licensed appraisers holding the AT, AL, AR, or AG, license status or their equivalent, that are in good standing with the regulatory body in their respective jurisdictions. Members shall have the full rights and privileges of membership, as determined by the Board of Directors. These rights and privileges shall include, but are not limited to, the following rights:

- 1) Vote for Directors of the Board to which they belong;
- 2) Be elected to a position on the Board;
- 3) Use the term "REAA Member" and;
- 4) Vote to approve or disapprove the bylaws or amendments and;
- 5) Occupy a position on the Corporate Board.

2. Affiliate Member

This classification is open to all persons who are interested in the real estate appraisal profession, but who do not hold an appraisal license. Affiliate members shall not have the right to vote or hold office.

4. Lifetime Member

This classification is awarded by the Chapter to a member who has demonstrated an outstanding, long-term commitment and/or measurable contribution to the



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goals and objectives of REAA. Lifetime membership shall be conferred only by unanimous vote of the Chapter Board. Lifetime members have the same rights

and privileges as a Member of REAA, however will not have an obligation to pay Chapter dues in recognition of service and contributions. The Chapter is obligated to pay Corporate the required membership dues for all Lifetime Members.

4.3 Membership Dues Schedule

The membership dues schedule is established by the Corporate Board of Directors. The dues shall be collected by the Corporate office. The dues minus the Corporate contribution for membership will then be forwarded to the Chapter. Payment of dues by members will be on the website or collected by check or cash by the Chapter and forwarded to the Corporate office. The dues are due at the first of the year and on an annual basis. Chapters may decide to pro-rate dues paid later in the year. Experience has shown that only a reduction of one-half the dues after July is workable. Any pro-rate would only apply to a new member—a one-time event, not a person that has ever been a member before. The current dues are \$ 125.00 for members; \$75.00 for Associate members; \$ 50.00 for Affiliate members. Corporate assesses out of these amounts a \$ 25.00 per member charge for the Corporation dues. The Corporate amount is the same regardless of the membership classification or if dues are pro-rated.

4.4 Maintaining a Membership Roster

Maintaining a Roster is an important aspect and benefit of membership in REAA. An informational application form should include information for production of a membership roster, whether it is on the web or if your Chapter produces a membership roster. The information in addition to the usual phone numbers and address would be specialties and areas served. Production of a paper roster is a good resource for members to use when requests for assignments come in that the appraiser cannot do. The roster becomes a referral tool.

4.5 General Membership Classification

REAA Corporate has established a classification for those wishing membership in REAA in locations that are not represented by a local REAA Chapter. Once a Chapter has been established these members will become part of that Chapter's membership.

5.0 Organization and Structure of the Chapter Board of Directors and Officers

5.1 Elections

Only members of the REAA in good standing may hold office or vote in elections of officers or vote to change bylaws. Elections will be held in accordance with the current by-laws of the Association.

5.2 Terms of Office

The elected members of the Board shall serve a two-year term and, upon the expiration of each term, be eligible for re-election to the same or any other vacant position on the Board. Each year one-half (or close to that number) of the Directors terms shall expire.

5.3 Boards of Directors

The business of each Chapter of REAA shall be managed by a Chapter Board of Directors. The Chapter Boards' authority shall, in all respects, be subject to the authority of the Corporate Board. The Chapter Boards will operate in compliance with the bylaws and the goals of REAA.

The Chapter Boards are charged with the following responsibilities:

- a) Promote the goals and objectives of the Association;
- b) Provide guidance, instructional programs, and other pertinent information to their membership;
- c) Recruit and screen applicants for membership;
- d) Provide opportunities for their members to participate in REAA activities;
- e) Nominate one (1) member to the Corporate Board of Directors; and
- f) Other requirements as may be made to the Chapter Board by the Corporate Board to achieve the goals and objectives of the Association.

5.4 Officers' Duties and Responsibilities

a) President (elected by Chapter Board)

Description: Responsibility of managing all chapter business, running meetings and classes and making sure that the chapter is run consistently within the bylaws of REAA.



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Duties: The President presides and conducts the Board meeting according to Robert's Rules of Order, as well as, the membership meetings; oversees the various Chapter positions : develops an agenda for the business meetings, establishes a regular meeting place, develops committees as required by the needs of the Chapter; delegates work and assignments to Board or other REAA members in running the chapter; and reports to the Corporate Board.

Suggestions for the position: The position of Chapter President is a recognizable honor and should be held by an REAA member that has served on the Board of Directors, has held an Officer level commitment, and has served in at least one of the Chapter committees. Attendance to all meetings, classes and workshops provided by the chapter is expected.

b) Vice President (elected by Chapter Board)

Description: The primary responsibility is to assist the president in managing chapter business, running meetings and assumes the duties of the president when required by absence or other cause, as well as any other duties assigned by the President.

Duties: Supports the various Chapter positions and assist and advise the President on Association matters.

Suggestions for the position: The Vice President should have served on at least one of the chapter committees. Attendance to all meetings, classes and workshops provided by the chapter is expected.

c) Secretary (elected by Chapter Board)

Description: The Secretary has the primary responsibility of keeping the records for the chapter, recording the minutes of the chapter board meetings, keeping the chapter calendar, and typing the minutes of the previous meeting prior to each board meeting, as well as other duties assigned by the President.

Duties: Maintain the minutes, maintain a copy of the Board resolutions developed in the business meetings, provide a copy of the previous meeting minutes to the Board.

Suggestions for the position: The secretary may have served on one of the chapter committees. Attendance to meetings, classes and workshops provided by the chapter is expected.



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d) **Treasurer** (elected by Chapter Board)

Description: The Treasurer has the primary responsibility of all financial matters concerning the Chapter's receipt of dues, meeting/class reservations, payment of bills for the Chapter's financial obligations, bank deposits, and compiling quarterly data to be submitted to Corporate for tax purposes, as well as any other duties assigned by the President of the Board.

Duties: The Treasurer will present a written report at each meeting, or at another time as called for by the Board President, which will become a part of the minutes. The Treasurer is also responsible for the timely delivery of quarterly reports to the Corporate Treasurer. The reporting standard and the accounting will be within the guidelines established by the Corporate Board. The approved accounting program is Intuit's "Quicken" program. REAA's cash control policy, the use of the Quicken program and the standardized chart of accounts will be provided under separate cover.

Suggestions for the position: Attendance to meetings provided by the chapter is required. Attendance to classes and workshops is recommended.

5.5 **Vacancies**

Vacancies in the Board can be filled without an election. The new applicant can be chosen by the Board to serve out the term of the vacant Board member. This allows the Board to function with the least amount of time lost filling the vacancy.

5.6 **Compensation or Inurement**

The members of the Board of Directors will not receive compensation for attendance of the meetings of the Board of Directors or for committee activities of the Board. Nothing precludes any director or member of the Board from being reimbursed for expenses paid by a member of the Board to others on behalf of the Association, provided such expenses have had prior approval by the Board. Any return of dues or contributions must be in proportion to dues paid or contributions made. Rev. Rul. 81-60, 1981-1 C.B. 335. The inurement prohibition does preclude furnishing benefits for some members at special rates, at the expense of other members. Nevertheless, an IRC 501(c)(6) organization may make cash distributions to its members without loss of exemption where such distributions represent no more than a reduction in dues or contributions previously paid to the organization to support its activities. Please contact Corporate on any issues of compensation to individual members.

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5.7 Removal from Office

Board members may be removed from office in accordance with the bylaws.

6.0 Chapter Committees

Chapter committees may include any of the following. Current Board members may hold multiple positions. The President of the Board of Directors for the Chapter should appoint a chairperson to head a committee. The president may appoint ad hoc committees to perform whatever functions he/she, the executive committee, or the Board deem necessary or desirable. The president may appoint ad hoc committees to perform whatever functions he/she, the executive committee, or the Board deem necessary or desirable.

6.1 Executive

There shall be an **Executive Committee** composed of all elected officers of the Board. The Executive Committee shall determine the time and place of meetings; plan programs for the Board; fill offices vacated by resignations, dismissals, or deaths; carry out routine business. The executive committee shall meet prior to the regular Board meeting to discuss issues of a confidential nature and only executive committee members may be present.

6.2 Membership

The **Membership Committee** will be chaired by the membership chairperson and should include at least two other members who volunteer upon request, with the approval of the Board by majority vote. This committee has the duty of selecting as members those candidates who meet the requirements for membership. The committee is to receive nominations from the members and self-nominations. It may seek out candidates in the area normally served by the Association who have achieved a measure of success in the profession and who show promise of a successful career in appraising. Before selecting a candidate for membership, the committee shall ensure that the individual satisfies the membership requirements outlined in the Bylaws. The membership committee chairperson will be responsible for notification of acceptance or rejection of membership.

6.3 Facilities

The **Facilities Committee** shall organize and work with the Location Manager where the meetings are held to arrange the food and other incidentals including collection of payments, and arrangement of the facilities, for the regular general membership meeting and the Board of Directors meeting, as well as outside events throughout the year. This is a volunteer position, if no volunteer's; the president may appoint a Board member to head this committee.

6.4 Programs and Education

The **Programs and Education Committee** is probably one of the most important committees for the Chapter. Your success as a Chapter will rise or fall on the educational benefit you offer to your membership. These positions should be filled by a highly motivated, dedicated individual willing to put in the time required to magnify this position. The chairperson shall organize and select meeting speakers as well as other educational events. This is a volunteer position; however the president may appoint the head of this committee if so needed.

6.5 Web Site

Web Site Committee shall be responsible to maintain the Chapter web page with current information for the membership as well as maintaining the roster of members, and other items on the page with the assistance from the membership committee. The web site shall be [www. REAA.ORG](http://www.REAA.ORG)

6.6 Bylaws/long Range Planning

The **bylaws and/or long range planning** committee will consider directions of the local Chapter and ways to improve service to members as well as other issues affecting membership. Bylaws changes or additions/deletions require written notice to the Corporate Board. The Corporate Board will consider the proposal and write a response to the Chapter with their results.

7.0 Chapter Board Meeting

Chapter Board meetings should be held on a regular basis, usually monthly, or as the Board decides, but not less than quarterly. They could be held before the general meeting. The President of the Board is the presiding and conduction officer at the meetings. An Agenda (see appendix for an example), should be provided the attending members and others by the President. The Board meeting, with exception of an **Executive Session**, is open to the general membership as well as others (however, others attending are by invitation only). You should allow 2 hours for the meeting.

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7.1 Parliamentary procedure shall follow Robert's Rule of Order

The President should conduct in accordance with Robert's Rule of Order. Maintaining control of the meeting is paramount to meeting time requirements to complete the business at hand. Some members have a habit of expounding on every issue with "war stories" or "personal histories" an effective leader can shut this activity down without offending the member by enforcing Robert's Rules. The normal order of business is as follows:

- a. Approval of minutes of previous meeting
- b. Treasurer's report
- c. Reports of standing committees
- d. Reports of ad hoc committees
- e. Unfinished (Old) business
- f. New Business
- g. Closing

The normal order of business may be altered by the presiding officer. The Board votes by majority vote by those present at the meeting.

7.2 Executive Session

The Executive Session is a session held before the regularly scheduled meeting to discuss issues that are not issues open to the general membership. This may include issues about a standing Board member. These meetings may be included in the Secretaries notes; however the meeting and results are not included in the Secretaries Minutes which are presented at every meeting.

7.3 Board Meeting Procedure

The President officially opens the meeting when a quorum of the Board is present. A Quorum is generally considered one-half plus one of the number of standing Board

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members. If a quorum is not present the attending Board members are authorized to meet and handle routine business, subject to later ratification by a duly constituted Board. A quorum of the general membership meeting consists of the number of members present. The Agenda, Minutes (these may be emailed before hand), financial report, and any other materials are handed out at the beginning of the meeting. Note: when leaving the meeting have someone pick up any of the documents left on the table.

The President adds any issues to be discussed to the agenda prior to the meeting, as well as bringing forth the new business into the old business category and adding any new business to be brought up at the meeting.

The President follows the agenda by directing his comments to the chairperson of the committee. This procedure is continued until all the items are covered or are held off for future meetings. The Board should allow enough time to meet and greet the members as well as the speakers who are attending the general meeting. It is also suggested that Board members spread themselves out among the tables at the meeting to get the “feel and attitude” of the members as the meeting goes on. You can learn a lot about the membership’s response to speakers, the topic, the facility and/or the meals.

7.4 Suggestions on Meeting Times and Location

There are a number of ways to conduct the meetings. Some Chapters favor the luncheon meeting with the Board meeting prior to the general membership meeting. The general membership meeting is usually two and a half hours long with the meal prior to the meeting. There are other Chapters that have afternoon meetings.

Locations are generally set a location central to the membership. Registrations and Facilities committee usually handles this at the direction of the Board. Be aware of Hotel policies on rooms/food rates as well as facilities allowing you to use your own equipment. Generally, most Chapters maintain their own equipment: 7’ Screen (cost \$200-\$ 250), Projector (cost \$400-\$800 min 2000 lumens), Microphone and hook-up to hotel system (\$ 100-\$300 may want to have speakers). Class speakers usually bring their own computer.

7.5 Planning Meeting

The last meeting usually held in December, for some Chapters this is their Planning and Election of Officers meeting. After the elections in November for new Board members it is time for the new Board to elect their officers. December has generally not been a good month to hold a general meeting. It seems to conflict with many member events. It is also the most expensive time of the year to reserve a room for

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an event and reservations must be made well in advance. It is up to the Chapter to determine what their procedure will be. Either way, general meeting or not, the Chapter Board needs to elect officers and the new Board needs to plan the beginning of the next years events so that the Chapter will be up and running in January with a speaker and topic that will bring in membership. Some Chapters hold this meeting, which usually takes 3 or more hours, in December at about the same time as the regular meetings and provides snacks or cold cuts for the Board.

7.6 Standing Rules

Consider having the Chapter Secretary maintaining a record of “Standing Rules”. Standing rules are those items voted on by the Board that become the operating procedure for your Chapter. Examples could be what kind of gifts to be given the speakers, possible pro-rations of dues to new members, or any other items that you would want to have recorded so that you are not voting on the same items time after time.

8.0 General Meetings

The General meeting is open to all members as well as others of interest in the Association.

8.1 General Meeting Format and Notification

The evening Board meeting would start at 4:30pm ending at 6:00pm or 6:15pm. The Board meets with the speakers and members. The general membership meeting is conducted at 6:30 by the President, first introducing any special guests, the speaker (by name only-the full bio is presented when the speaker takes the stand), any other persons as the President sees fit. Next the President directs comments to any issues of interest to the membership. The President announces upcoming events or can have the Chairpersons discuss coming events such as the next meeting class or new members or other issues. The President then releases the members to dinner by starting with the speaker and the speakers table. At 7:00pm the speaker is announced and presented with a bio and the class begins, ending at 9:00pm. The President has signed the certificates, if it is a CE class, and the certificates are available at a table or location near the exit. CE requires a sign in-sign out sheet.

Notification for the meetings is through emails. There is also a place for educational or meeting offerings on the Chapter website.

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8.2 Program Ideas and Other General Interest Items

The programs should address those issues affecting the membership in your location. Local experts could be brought in to make a presentation on their areas of specialty. Once every two years USPAP is required. It is suggested that you offer a reduced rate USPAP class as your first or second class for the year as a membership incentive. One Chapter offers the USPAP for under \$ 100 which includes the USPAP book, instruction, and lunch. The Chapter absorbs any loss. REAA has many USPAP Appraisal Qualification Board Certified Instructors as members. Now it's a 4 year requirement prior to renewal of your 4 year license for the "Laws and Regs" class. This is another class that should be offered every 4 years or more by the Chapter. In the past OREA has presented a 2 hour Fraud seminar. Liability Administrators (an appraisers E & O company) offers a 2 hour and a 4 hour "Fraud" class that can be presented to your members. REAA maintains a list of REAA owned OREA approved classes that are available to the Chapters for use. You may also produce your own classes. Please contact REAA first when developing a class as this may be a class of general interest to all Chapters. Chapters have offered river boat dinners, baseball game, casino night events.

8.3 How To Get Approval of Your Own Educational Classes

OREA offers a handbook for educational providers on class procedures. If you are going to do your own classes, you will first have to become an educational provider in accordance with OREA rules. You can then submit classes. There is a recurring charge for course provider and for any classes you may have. Contact REAA Corporate Board before undertaking such a project.

8.4 Database Requirements when a CE Credited Course is Presented

OREA is specific in the requirements for class presentation. The best way to accomplish correct procedure is to have a data base program such as Access or Excel. See Appendix for more information.

8.5 Continuing Educational Offering Procedure

The procedure for offering a class is as follows: Flyers (see Appendix) must have a refund policy, cost, class name (as registered with OREA), class hours, location, and time.

Registration and payment will be made on the REAA website. You will receive a list of attendees and payment. You will need a sign in-sign out sheet headed with the class-date-location.



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You will need to make up the certificates (unless the presenter has the class approval and the certificates) (See Appendix) usually the President signs the certificates. These are made available only after the class and after they sign the sign out sheet. Generally the presenter has handouts that they provide.

8.6 Planning Your Educational Calendar

Planning the calendar is a very important aspect of the Chapter business. All members of the Board should be involved in this process with suggestions of classes and instructors recommendation. This should be held at the planning meeting at the end of the year.

8.7 Annual Jim Trusass Award

Jim Trusass was an ardent founding member of REAA. He was instrumental in the beginning stages of the Association to provide quality meetings for the membership. He was tireless in his effort to promote professionalism in REAA and the Appraisal Industry at large. REAA honors his memory by awarding the “Jim Trusass Award” for meritorious effort on behalf of a practicing appraisal member of REAA. Chapters are to submit those they feel are worthy of this award to the Corporate office prior to the end of the year.

9.0 The Corporate Board

9.1 Electing a Chapter Representative to the Corporate Board

9.2 Corporate Board Committee

9.3 Financial Reporting

9.4 Corporate Board Contact Information

10. Website use

10.1 Submission of calendar events and other entries

10.2 management of your website

10.3 your cost of the website



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APPENDIX

Treasurer's Guide including: Cash control policy, chart of accounts, Quicken policy, reporting guidelines, and annual Chapter report template (sent under separate cover)

Meeting Flyer Examples

Continuing Education Classes Currently Approved and Owned by REAA Corporate

Brochure and Mailer Examples

Meeting Agenda Example

Election Ballot Example

Enrollment Example

Course Evaluation Example

Expense Reimbursement Request

Speaker Agreement Example.

Speaker Requirements Example

OREA Educational Offerings Information

Continuing Education Class Attendance Certificate