



**Institute of Real Estate Management
Oregon-Columbia River Chapter No. 29
Statement of Policy**

POLICY #1 – POLICY PURPOSE AND FORMULATION

Policy Statements serve the purpose of developing guidelines and standards for internal IREM-Oregon Columbia River Chapter No. 29 operations. Policy statements shall be approved by the Executive Council on a continuing basis as needed and must be re-approved each year by the new Executive Committee or Executive Council. Policy recommendations may be made by staff, committee chairpersons, the Executive Council or the Executive Committee. Approved policy statements shall remain in effect until modified or appealed by the Executive Council.

POLICY #2 – CANDIDATE AND CPM REQUIREMENTS

Criteria to Become a CPM® Candidate

To be eligible for CPM Candidacy, an individual must meet the following requirements:

- Complete the CPM® Candidate application, together with a nonrefundable application fee.
- Either hold a real estate license or validate that you are not required to have one.
- Pledge to uphold the IREM Code of Professional Ethics.

Vendors, suppliers and service providers to the real estate management industry are not eligible for CPM candidacy.

Becoming a CPM®

To earn the CPM designation, a candidate must meet one of four options:

Option 1: Complete seven required courses as listed on www.irem.org.

Option 2: Hold a CCIM, CSM, PCAM or RPA designation and submit the fast track approval fee.

Option 3: Have an undergraduate or graduate degree with a major, minor or concentration in real estate or property management and submit the fast track approval fee.

Option 4: Have 20 years of qualifying professional experience (as verified via experience reports and approved by the chapter) and submit the fast track approval fee.

Management Plan: Pass a management plan on an actual property (MPIND) (or) Pass management plan skills assessment (MPSA).

Pass the CPM Certification Exam

Attend ETH800 and pass the exam. Pledge to uphold the IREM Code of Professional Ethics


Submit 3 Confidential Letters of Recommendation (provided at the time of candidacy approval)

Have 3 years (36 months) of qualifying real estate management experience as defined by IREM

Fulfill the one year Candidacy period by being a CPM® Candidate Member, ARM Member or ACoM Member in good standing for the 12 months prior to CPM Approval. Submit a CPM application with the application fee

- Be current with annual national and chapter dues.
- Hold a real estate license or verify that you are not required to have one for your current position.
- Be affiliated with the NATIONAL ASSOCIATION OF REALTORS®
- Attend two IREM Chapter meetings or events during the 12 months immediately prior to CPM® approval.
- Be interviewed and approved by your IREM the chapter.

Policy #3 – USE AND ADVERTISING OF THE CPM DESIGNATION

Both “CPM” and “Certified Property Manager” are registered collective marks which, thus, are used to indicate membership in the organization owning the Mark – IREM. The CPM® Key Logo, “” has also been registered.

Because the terms “CERTIFIED PROPERTY MANAGER” and “CPM” are collective membership marks registered in the United States Patent and Trademark Office under the Lanham Act, they must be distinguished from other words of ordinary use. When the terms “CPM” or “CERTIFIED PROPERTY MANAGER” are displayed, they should always be capitalized and followed with the registration symbol “®”. On the rare occasion that the “®” is not used, it is good practice to place the marks within quotation marks.



The terms "CERTIFIED PROPERTY MANAGER" and "CPM" are to be used by designate individual members of IREM, the terms should never be used in any way that might imply that a firm or business organization is a "CPM". The terms should not be abbreviated, punctuated or in any way distorted.

Infringements and violations of the above-stated policy may be cause for legal action.

POLICY #4 – DUES ASSESSMENTS

1. Certified Property Manager. Chapter dues shall be \$190 annually or as otherwise approved by the Executive Council
2. CPM Candidates. Chapter dues shall be \$175 annually or as otherwise approved by the Executive Council.
3. Accredited Residential Manager. Chapter dues shall be \$65 annually or as otherwise approved by the Executive Council.
4. Accredited Commercial Manager. Chapter dues shall be \$75 annually or as otherwise approved by the Executive Council.
5. Accredited Management Organization and Associate membership dues are paid to IREM National.
6. Emeritus and Life Member – Gratis
7. In the event of a medical disability or hardship, an ARM or CPM may apply to IREM Chapter No. 29 for a one-time dues waiver. The application must be in writing, and must be accompanied by verification of the medical disability or hardship. Such request shall be reviewed by the Executive Council for approval at their sole discretion.

POLICY #5 – DUES REFUND

No dues refund of local paid Dues or Chapter Service Fees (if any) shall be made for any reason, except as approved by the Executive Council.

Policy #6 – NOTIFICATION POLICY

In any and all matters regarding committee decisions, policies or activities that have immediate or potential impact on the Institute, the IREM Association Executive should be notified and made fully aware of the impact and IREM's input requested.

POLICY #7 – ENDORSEMENT OF POLITICAL CANDIDATES

Prior to political candidate recommendations or endorsements being final and made public, said recommendations or endorsements must be recommended

by the Legislative Committee and approved by the Executive Council.

POLICY #8 – OFFICERS AND EXECUTIVE COUNCIL

The elected officers of the chapter shall be a President, President-Elect, Vice President of Member Services, Vice President of Finance and Vice President of Communications who shall be elected by the active membership of the chapter. Job descriptions for Officers and Executive Council members are available on file.

The Executive Council is comprised of the Officers of the Chapter, plus three Members at Large, and the Chair of the ARM Committee. Any Executive Council member who misses three or more meetings of the Executive Council shall be considered to have resigned from office.

For purposes of this policy, absences will be viewed as "excused" and "unexcused". An Executive Council member who has three unexcused absences shall be considered to have resigned. To be considered as an excused absence, the member must notify the President in advance of his/her inability to attend. Reasons for excused absences include: (1) illness (members must call the IREM President during the date of the meeting to indicate an illness); (2) prior scheduled business meetings/travel; (3) vacation or absence from the City; (4) other reasons deemed valid by the President.

POLICY #9 – IREM [COMMITTEE] MEETINGS

Unless approved in advance by the President and posted accordingly, all IREM committee meetings, including the Executive Council, shall be open to any members who wish to attend.

Attendance at IREM membership meetings, excluding the Forecast Breakfast, are limited to CPM members, CPM Candidates, ARM members, Associate Members, Student & Academic members, ACoM members, Friends of IREM in good standing, and their guests, and non-members who pay the non-member rate.

POLICY #10 – COMMITTEE CORRESPONDENCE

Any and all correspondence from a committee to other individuals regarding that committee's functions, responsibilities and program shall come from the chair only or at the direction of the chair of that committee. Further, all such communications shall originate from or be coordinated with the Chapter office with copies to elected leadership, when appropriate.

POLICY #11 – COMMITTEE REPORTS



Committee Chairs shall file reports with the Executive Council through the appropriate Vice President. Said reports may be given at the monthly Executive Council meeting or filed with the IREM Association Executive prior to the Executive Council Meeting.

POLICY #12 – AUTHORIZED SPOKESPERSON

The President, President Elect and the IREM Association Executive shall be the authorized spokesperson for the Chapter. No other individuals shall speak for the Chapter or its membership as a whole without prior approval of the President or IREM Association Executive. Officers, Executive Council and staff shall not respond to any verbal or phone surveys but will respond only to written surveys. The IREM Association Executive or Legislative Committee Chairperson or Chapter Lobbyist shall be the authorized spokesperson for the Institute regarding governmental affairs issues.

POLICY #13 – SOLICITATION

All solicitation of funds, financing of projects and endorsements must be submitted to the Executive Council for approval or recommendation before implementation. In addition, a budget must be submitted for approval or recommendation before implementation. In addition, a budget must be submitted for approval wherein IREM finances will be pledged against losses or advance payments of costs.

POLICY #14 – DONATIONS

No expenditure or donation of IREM funds whatsoever shall be made to religious, philanthropic, political (including candidates and ballot measures or issues) or civic organizations without the approval of the Executive Council.

POLICY #15 – AMENDMENTS TO INCREASE ANNUAL PROPOSED OR APPROVED BUDGET

Any amendments or proposals to increase expenditures in the IREM Proposed or Approved Annual Budget in any budget line item, must be approved by the Executive Council, or in an emergency by the Officers of the Chapter.

POLICY #16 – REFERRALS AND RECOMMENDATIONS

Requests from members and the general public, written or verbal, for recommendations of individual members or Friends of IREM shall be referred through the IREM Association Executive, who shall direct them to the most current Membership Directory. The IREM IAE shall not make recommendations of any one person or firm.

POLICY #17 – CONTRACTS AND ENCUMBRANCES

The President and IREM Association Executive, with input from any appropriate committee(s) and the approval of the Executive Council and legal counsel, when needed, shall be the only individuals authorized to enter into contracts or agreements which incur financial or other liabilities to the Chapter.

POLICY #18 – TRAVEL PROCEDURES & REIMBURSEMENTS

IREM feels involvement by its Officers and Executive Council in IREM National conferences and conventions is important and reimburses that involvement as follows:

Both the President and President Elect are reimbursed an amount as indicated in that years budget to attend the National Education Conference held in the fall of each year. Reimbursement for submitted receipts includes hotel, airfare, shuttle, cab or gas, registration expenses only, and attendance at one main conference function as noted below and an amount up to \$50, per day, for meals if indicated in that years budget.

Both the President and President Elect are reimbursed an amount as indicated in that years budget to attend the Mid-Year Legislative conference held in April of each year. Reimbursable items are as noted above.

Travel expenses for other Chapter committee members are at the discretion of the Executive Council, as approved in that years' budget.

Reimbursement for the IREM Association Executive travel will be as follows: All expenses, as indicated in that years budget for attendance at the Mid Year Legislative and National Education Conferences. Reimbursement includes registration, airfare, hotel, taxi's, etc. and an amount up to \$50, per day, for meals as indicated in that years budget.

IREM-Oregon Columbia River Chapter will reimburse upon receipt of a Reimbursement Request and receipts. Said Request should be submitted within 30 days of travel. All expenditures must be accompanied by a receipt.

Event

The Cost of registration for the event (conference/meeting/convention) is reimbursed by the Chapter. The cost of one main conference function (i.e. Awards Banquet, Inaugural Banquet, dinner event) for the member only, is covered by the Chapter.

Airline Reservations/Transportation

Travelers should make their own airline reservations and should arrange for the most economical airfare available, consistent with circumstances. Airline travel will be



reimbursed at coach class only, with super saver and advance booking discounts, where available. The Chapter does not reimburse the cost of parking at Portland International Airport.

If the traveler chooses to travel by personal automobile, reimbursement, including any tolls, parking, etc. will be at the current rate allowed by the IRS, up to the cost of coach class airfare.

Hotel/Lodging

Lodging expenses are reimbursable. Chapter members are encouraged to stay at the conference hotel. If other arrangements are made, the Chapter will pay up to the rate of single occupancy at the headquarters hotel. Hotel/motels are authorized for one night before and one night after the meeting, as travel conditions require. In completing the Reimbursement Request, show only room charges and taxes under hotel living expenses. Personal expenses should be paid for separately when possible and not included as part of any documentation. However, when included in the hotel bill, personal expenses such as toiletries, movies, magazines, health club expenses, etc., must be indicated as personal on the hotel bill and deducted from the overall reimbursable expense.

Transportation Between Airport and Hotel

Travelers are encouraged to take the least costly transportation between the airport and hotel. However, time and degree of inconvenience should be considered. A rental car will be reimbursed only if other transportation between airport and conference hotel is not available, or the cost of the rental is less than the cost of travel by cab or other less expensive mode of transportation. If necessary, rental car auto reimbursement will be covered at the economy car level. Additional insurance is not reimbursed.

Telephone

No telephone expenses are reimbursed.

Meal Expense

Meals will be reimbursed up to \$50 per day for meals as indicated in that years budget

Tips

Tips are reimbursable expenses with receipt given to individuals for service, i.e. for luggage, material handling, skycaps, etc.

Spouse Travel

Due to increased restrictions placed on non-profit organizations by the IRS, spousal travel will not be covered by the Chapter.

POLICY #19 – COMMITTEE BUDGET REVIEW

All committees shall be responsible for the monitoring of their income and expenses and compared to the approved budget. When any significant variance is identified in either income or expense, the committee chair, through staff, shall be responsible for reporting such variance to the Vice President of Finance with any appropriate explanations or recommendations for action.

POLICY #20 – DUE NOTICE

In all instances where advance notice to the membership is required to conduct the official business of the Chapter, such notice shall be deemed given as printed and mailed to all members in good standing on file at the time of distribution.

POLICY #21 – ANNUAL MEETING

The annual meeting of the Chapter shall be held in November of each year.

POLICY #22 – BANK ACCOUNT SIGNATORY

The following shall be authorized to sign checks: President, President-Elect, Vice President of Finance and IREM Association Executive. However, IREM Association Executive is authorized to sign checks up to \$1,000.00 in an emergency situation.

Any Assistant, at the IREM office shall be authorized to make deposits, request balance information, issue stop payment requests and transfer funds between accounts.

POLICY #23 – COMMUNICATIONS

Because communication between IREM and its members is of critical importance the following publications will be distributed to members as follows:

1. InFocus – Quarterly
2. Membership Directory – Yearly
3. News Updates – Regularly

POLICY #24 – CONVENTION AND MEETING PLANNING

The IREM Association Executive shall be responsible for all communications, correspondence and logistics between the Chapter and meeting facilities and hotel properties relative to Chapter meetings, functions and conferences unless otherwise directed by the Executive Council.

POLICY #25 – USER FEE PROGRAMS, PRODUCTS AND SERVICES

The propriety and value of all user fees (non-dues related income) programs, products and services shall be measured against the following criteria:



1. Does the program or product fall within the scope of the strategic plan?
2. Does the program or product address a member need?
3. What are the legal liabilities involved with the program or product?
4. Will the program or product increase expenses of the Institute?
5. Is the potential market for the program or product adequate?
6. What are the benefits of the program or product to the member and to the Institute?

All such programs, products and services shall be submitted to the Vice President of Finance for review prior to presentation to the Executive Council.

Updates: 4/98, 5/99, 1/00, 3/02, 9/11, 6/14

