Association Policies and Procedures Manual of the Raleigh Regional Association of REALTORS®



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POLICY MANUAL
RALEIGH REGIONAL ASSOCIATION OF REALTORS®

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SECTION 1: INTRODUCTION

The Raleigh Regional Association of REALTORS® (RRAR or the Association) is an association of volunteer members governed by Bylaws adopted in 1924 and as amended from time to time by the Board of Directors. Qualifications for and objectives of membership are found in the Bylaws, as approved by the National Association of REALTORS® (NAR). The governing body of the Association is a Board of Directors. The Association's activities are carried out through committees of volunteer members. The policies found in this manual are in addition to, not a replacement for, the Association's Bylaws.

SECTION 2: BOARD OF DIRECTORS

The Officers and Directors of the Association shall comprise the governing body of the Association of REALTORS®. Specific responsibilities and duties of the Board of Directors are as follows:

2.1: Directors' Responsibilities

- Serve as the governing body of the Association and control all the affairs of the Association, subject to the restrictions imposed by the Bylaws.
- Select the financial institution(s), by resolution, to deposit all Association monies.
- Employ such Chief Executive Officer (CEO) to manage the day-to-day operations of the Association.
- Contract with an outside independent accounting firm to be available for consultation per policy *5.3 Legal Counsel & CPA*, and to conduct audits of the Association's books, including the annual audit. Directors may refer any member of the Association to the Secretary-Treasurer and/or CEO if the member requests a report of the Association's audited income and balance sheet.
- Contract with outside legal counsel to attend monthly meetings and be available for such consults as deemed necessary per policy *5.3 Legal Counsel & CPA*.
- Review and approve a budget prepared by the Finance Committee reflecting projected income from all sources and projected costs and expenses of the Association for the next fiscal year. The budget shall be submitted to the Directors not less than thirty (30) days prior to the first day of the next fiscal year.
- Report regularly and promptly to the members of all actions of the Board of Directors.
- Review and act on committee requests. If financial requests exceed the approved budget by more than $10,000.00, such requests must first be reviewed by the Finance Committee.
- Review actions of the Executive Committee carried out in the interim between Board of Directors' meetings.
- Approve and amend such rules, regulations, and policies necessary to the operation of the Association.

- Attend all Board of Directors' meetings. Any Officer or Director of the Board who is absent from three (3) Board of Directors' meetings in one (1) calendar year shall, on their third absence, have automatically resigned from their position. There shall be no differentiation between "excused" or "unexcused" absences. One Board of Directors' meeting per year may be attended virtually with advanced notice to the President. Officers and Directors must be on camera during the entire meeting. Any absence from a Board of Directors' meeting should be reported to the President and CEO in advance, when possible. The attendance record, as included in all board packets, shall serve as the actual record of attendance. Any corrections must be made before its approval at the next meeting. Association staff will notify any Officer or Director after a second absence during the year.
- Serve without compensation.
- Represent the entire membership by:
    - Soliciting member input as much as possible.
    - Placing the welfare of the entire membership ahead of geographical or factional considerations.
    - Expressing their viewpoints and sharing their opinions on issues before the group.
- Be informed and knowledgeable in areas of particular interest, concern, and importance to the Association and the real estate industry.
- Volunteer for Association committees and councils as Director Liaisons. Committees or councils that do not have a Board of Director will have one appointed. The Pro Standards and Grievance Committees are excluded.
- Provide reasonable access to member guests. It is the policy of the Association to protect the interests of its members and employees in maintaining confidentiality. All guests and staff will be excused when the Board is called into Executive Session, at which time matters relating to confidential personnel matters, professional standards hearings, results and appeals, and attorney-client communications, among other possible matters, may be discussed. (As discussed in 9.3: Members' Access to Meetings and Materials)
- Attend the mandatory Leadership Orientation to be held annually before the first Board of Directors' meeting of the calendar year.
- Review all materials prior to the Board of Directors' meeting. Should any Director have a question regarding the materials provided, they are asked to direct their questions to the Executive Committee and/or Association staff at least twenty-four (24) hours prior to the meeting, when possible.
- Read and be familiar with the Association's Strategic Plan.
- Be familiar with the Association's Bylaws, Policies, procedures, and issue positions.

2.2: Information and Education of Directors

Both the national and state associations can provide the Board of Directors with many resources for obtaining information. In addition, Association staff can offer assistance in most areas.

Board of Directors are a vital link between the membership and the Association. Directors should bring from the membership specific problems or concerns and should take back information concerning the Association's activities and programs. Members'

access to meetings, the Rules of Decorum, and other materials are defined under *9.3 Members' Access to Meetings and Materials*.

Board of Directors' Minutes, notices, and other meeting materials shall be emailed to members of the Board of Directors at least six (6) days prior to the next regular scheduled Board of Directors' meeting.

Board of Directors should also be familiar with:

- Current bylaws, constitution, and policies of NAR and the North Carolina Association of REALTORS® (NCR).
- Legislative activity on both the state and national levels.
- Robert's Rules of Order, latest edition.

2.3 Nominating and Certifying of Directors & Officers

Nominations

The Leadership Identification and Development (LID) Committee may nominate candidates, or any member may nominate him or herself, or another Association member (with cooperation) for certification as a candidate. All nominations shall comply with the Candidate Information requirements and require certification by the LID Committee. No nominations will be accepted after the sixty (60) day deadline. Candidates will be informed of the final slate of candidates at the close of nominations and certification.

Candidate Information

All candidates wishing to run for an Officer or a Director position must submit the required completed questionnaire and personal statement no later than sixty (60) days before the first day that voting is to commence.

The personal statement shall be no more than (five hundred) 500 words and shall not include false allegations or libelous comments regarding other candidates, the REALTOR® Associations, the Board of Directors, or other individuals.

A web page will be created on the Association's website that will contain all candidate questionnaires, photos, and personal statements, as well as a personal statement and photo of the incoming President. Each candidate will receive a copy of their candidate questionnaires and personal statements at least ten (10) days prior to the posting on the website and shall have three (3) days to make any changes and submit them. No less than thirty (30) days prior to the commencement of voting, the candidate information shall be posted on the website. All candidate information received by the deadline shall be posted simultaneously.

Campaigning and Communications

Candidates are permitted to campaign for themselves in person at the Association office not more than forty (40) days prior to the beginning of the voting period. Candidates may circulate literature or campaign brochures, so long as they do not interfere with the Association's typically scheduled activities or those of its rental clients. Candidates may request an audience at scheduled meetings with approval from the Chair or meeting organizer.

Candidates must conduct themselves in a non-intrusive manner and may not utilize signs, balloons, or other distractions or post any campaign materials. Candidates are not permitted to distribute flyers or brochures on vehicles in the parking lot. Violations of these policies will result in a reprimand from the Chair of the LID Committee. Repeat offenses may result in disqualification from the election.

The Association shall send a mass email to the membership announcing the election dates and times, and list hyperlinks to the individual candidate information, which shall be on the Association's website or a site linked to the Association's website. All names of candidates will be listed in alphabetical order. This email shall be sent no less than thirty (30) days prior to the commencement of voting. A second email announcement containing the same information shall be sent on the last business day prior to the commencement of voting.

Voting Procedures

The following guidelines apply to all votes taken for the Board of Directors and/or Officers:

a. Online voting will commence on the first Monday of the first week in October or on another day as determined by the Board of Directors and will be available until 5:00 pm on the first Friday of the first week of October. This Friday will be known as Election Day.
b. To vote, members will provide their name and NRDS number.
c. Records will be secured to ensure only one (1) vote per member.
d. Electronic ballots will be secured by an authorized Association staff member and the Chair of the LID Committee.
e. Total results of the e-balloting will be tallied and swiftly reported to the Association President. Prior to reporting the results to the membership, the President will notify each candidate as to their individual election results. If asked, the CEO can provide the candidate with their individual vote total (percentage and number of votes received) and their standing relative to the lowest number of votes to achieve election. The general membership will be notified of the election results as soon as possible, but no later than 5:00 p.m. on the following business day. The winners will also be announced on the appropriate RRAR communications channels.
f. If an individual should win both an Officers' and a Directors' race, they shall automatically decline the position of Director. The next highest vote receiver will assume the declined position.

Term / Firm Limits

Two (2) or more active members associated with the same firm may be Directors, subject to the limitation that no more than twenty (20) percent of the Board of Directors may be from the same firm. After Board of Directors' elections, if the maximum number of members per firm is exceeded due to a merger of firms, or to a Director moving from one firm to another, no change in composition of the Board of Directors will be required until the next regularly scheduled election.

SECTION 3: OFFICERS

3.1 Executive Committee

The Executive Committee is composed of all Officers elected by the general membership, or their successors, and the Association's Immediate Past President. The CEO shall be a non-voting member of the Executive Committee. The Executive Committee shall meet at the call of the President.

The Executive Committee shall have the authority to act for the Board of Directors between Board of Directors meetings with the full authority of the entire Board of Directors on any matters on which the Directors could act in a formal meeting, except that the Executive Committee shall not, unless specifically authorized by the vote of the Directors, take any of the following actions in lieu of the Board of Directors:

a. Act to change the corporate status or amend the Association's Charter, Bylaws or its subsidiaries and affiliates.
b. Determine to institute, or resolve, any lawsuit involving the Association where the potential exposure to the Association exceeds $10,000.00.
c. Approve any item not set forth in the approved budget having a total exposure to the Association exceeding $10,000.00.
d. Fill any vacancies for Officers or Board of Directors that the Association would otherwise fill.
e. Terminate or employ the CEO.

3.2 President / Duties, Responsibilities & Authority

The President, as chief elected officer, represents the entire membership and the best interests of the Association; exercises personal leadership in the motivation of other Officers, Board of Directors, committee members, and Association staff; acts as spokesperson and inspirational leader, and takes an important part in monitoring and evaluating organizational performance and effectiveness. The office of the President is one of leadership and personal commitment to the Association's members.

Within the limits of the Association's Bylaws and Policies, the President's authority is to accomplish the duties set forth below and to perform such other duties as approved by the Board of Directors:

a. It is essential that the President be informed and knowledgeable in all areas of Association involvement and in the real estate industry.
b. Represent the Association and act in its name, subject to its declared policies.
c. Appoint such committees and designate their chairs as deemed advisable, with notification of the Board of Directors.
d. Before the Board of Directors' Orientation, appoint one (1) Director to the Board of Directors to serve a two (2) year term. Such appointee shall be a REALTOR® member in good standing.

e. Serve as a non-voting ex officio member of all committees of the Association except the LID Committee, Professional Standards Committee, and Grievance Committee.
f. Guides the business affairs and strategic vision of the Association with the assistance of the Board of Directors, Executive Committee, and Association staff.
g. Supports and defends policies and programs adopted by the Board of Directors.
h. Presides at and attends all meetings of the Board of Directors, Executive Committee, and the membership meetings.
i. The President, or their designee, serves as the Association's spokesperson and represents the interests and objectives of the Association in dealings with the news media, allied organizations and industries, local, state, and federal legislators, and the general public.
j. Ensures that the Board of Directors and Officers are kept fully informed about the Association's conditions and operations.
k. Sees that the organizational structure of the Association is reviewed annually.
l. The President, or their designee, acts as the voting member of the NAR Delegate Body.
a. Represents the Association in attendance at the NAR REALTORS® Legislative Meetings, and NAR NXT, in addition to the NC REALTORS® Winter Meetings, the NC REALTORS® Legislative Meetings, and the NC REALTORS® Convention.
m. Perform such other duties as approved by the Board of Directors.
n. Select the President's Award - This award is selected at the discretion of the current President to recognize a member who exemplifies dedication to the Association and the real estate industry.

3.3 President-elect / Duties, Responsibilities & Authority

It is the responsibility of the President-elect to perform the duties of the President in the event of the President's absence or disability. The office of the President-elect is one of leadership and personal commitment to the Association members.

Within the limits of the Association's Bylaws and Policies, the President-elect's authority is to accomplish the duties set forth below and to perform such other duties as approved by the Board of Directors:

a. It is essential that the President-elect be informed and knowledgeable in all areas of Association involvement and in the real estate industry.
b. Attends as a voting member, all meetings of the Board of Directors, Executive Committee, and membership meetings, and presides in the absence of the President.
c. Serves as a non-voting ex officio member of all committees of the Association except LID, Professional Standards, and Grievance Committees.
d. Serves as Chair of the Strategic Planning Committee.
e. Strongly encouraged to serve as RPAC chair.
f. Appoints or certifies the Vice Chair of all committees, with consideration from the committees and Association staff.

g. Attends the NAR REALTORS® Legislative Meetings, and NAR NXT, in addition to the NC REALTORS® Winter Meetings, the NC REALTORS® Legislative Meetings, the NC REALTORS® Convention, and the NAR Leadership Summit.

3.4 Secretary-Treasurer / Duties, Responsibilities & Authority

The office of the Secretary-Treasurer is one of leadership and personal commitment to the Association's members. The Secretary-Treasurer is responsible for overseeing the Association's funds and assets.

Within the limits of the Association's Bylaws and Policies, the Secretary-Treasurer is responsible and has commensurate authority to accomplish the duties set forth below and to perform such other duties as approved by the Board of Directors:

a. It is essential that the Secretary-Treasurer be informed and knowledgeable in all areas of the Association's involvement and in the real estate industry in general. It is particularly important that the Secretary-Treasurer be knowledgeable of Association's financial activities.
b. Serves as Chair of the Finance Committee, a member of the Executive Committee, and a member of the Board of Directors.
c. Shall be responsible for working with the CEO and Association staff to maintain and provide oversight of such books, documents, and papers as the Board of Directors may determine, and access to the Corporate Seal. Such books shall be opened for inspection as prescribed by law.
d. Is responsible for working with Association staff to ensure that minutes and attendance of all the meetings of the Board of Directors and general membership are properly kept.
e. May sign with the President, President-elect or the CEO, in name and on behalf of the Association, any contracts or agreements authorized by the Board of Directors, and when so authorized or ordered by the Board of Directors, may affix the seal of the Association.
f. Shall perform, in general, all duties incident to the office of Secretary-Treasurer, subject to the authority of the Board of Directors, and shall perform such other duties as may be assigned by the Board of Directors.
g. Has responsibility for all funds, property, and securities of the Association and all subsidiary corporations, subject to such regulations as may be imposed by the Board of Directors. When necessary or proper, the Secretary-Treasurer may endorse on behalf of the Association, checks, notes, and other obligations and shall deposit the same credit to the Association at such bank or banks or depository as the Board of Directors may designate.
h. Prepares with the Finance Committee and Association staff an annual budget for approval by the Board of Directors, and makes recommendations for amendments to the budget when necessary.
i. Presents financial reports at the regularly scheduled meetings of the Board of Directors.
j. Attends the NAR REALTORS® Legislative Meetings, and NAR NXT, in addition to the NC REALTORS® Winter Meetings, the NC REALTORS® Legislative Meetings, and the NC REALTORS® Convention, as budgeted.

If the Secretary-Treasurer is unable to fulfill the position, action shall be taken as prescribed by the Association's Bylaws, *Article XI, Section 5: Vacancies*.

3.5 Immediate Past President

a. The Immediate Past President shall serve on the Executive Committee, the LID Committee, and the Personnel Committee.
b. Attends the NAR REALTORS® Legislative Meetings, and NAR NXT, in addition to the NC REALTORS® Winter Meetings, the NC REALTORS® Legislative Meetings, and the NC REALTORS® Convention, as budgeted.

SECTION 4: COMMITTEES, TASK FORCES AND ADVISORY GROUPS

4.1 Committees of the Association

Committees serve to assist in the effective implementation of Association objectives and specific programs. There shall be an annual opportunity for members to express their interest in serving on particular committees. If a committee has a vacancy or does not have the specified number of members, a rolling committee appointment process is available to appoint members to committees on an ongoing basis. All committee appointments are at the discretion of the President. Member access to meetings or materials is defined under *9.3 Members' Access to Meetings and Materials*.

Prior to the first meeting, Committee Chairs shall set and communicate to all members an attendance policy, recommending that absences not exceed 25 percent of the meetings. This policy will be acknowledged by signature by all committee members at the first meeting. Chairs, Co-Chairs and Vice Chairs must attend the mandatory Leadership Orientation to be held annually before the first Board of Directors' meeting of the calendar year.

Anyone attending virtual committee meetings is expected to have operable, active video unless otherwise excused.

Quorum for the transaction of business shall be a majority of the committee.

The President, with the approval of the Executive Committee, may appoint such Committees and/or Special Committees and designate their Chairs and Vice Chairs as deemed advisable and where not otherwise specified in these policies. A member can only chair one committee annually, with the exception of the Past-President, who is designated as Chair of the LID Committee and Personnel Committees, and the President-elect, who shall chair the Strategic Planning Committee and may chair the

RPAC Committee. No member should serve on more than three committees as a voting member at the same time.

The President has the authority to fill committee vacancies after consultation with the applicable committee chair, Association staff liaison, and the Executive Committee, with consideration given to those members who have previously applied for committee positions for the current year.

The following are considered standing committees: *Bylaws; Diversity Equity and Inclusion (DEI); Finance; Global Advisory; Government Policies and Issues (GPIC), Grievance, Leadership Identification and Development (LID); Personnel; Professional Development; Professional Standards; Public Relations and Communications; RPAC; Strategic Planning; Sustainability; Young Professionals Network (YPN).*

Special committees of the association include: *Legal Action; Policy Rapid Response Priorities and Issues; Hall of Fame; REALTOR® of the Year; and Awards.*

4.1.a Bylaws Committee
Meetings. Open to all members.
Duties. Reviews the Association Bylaws and Policies and makes recommendations to the Association Board of Directors.
Composition. The committee shall be comprised of the appointed Chair and eight (8) additional members who shall serve a term of two (2) years (staggered). The committee will meet two (2) times per year, or at the call of the Chair. The Officers should be invited as non-voting members. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. President-elect will select/certify the Vice Chair.

4.1.b DEI Committee
Meetings. Open to all members.
Duties. Promotes equal opportunity in housing, inclusion, and diversity within the real estate industry and the association. Identifies the concerns and needs of minority members and assists in the development of actions to address those needs and concerns. Serves as ambassadors to minority real estate organizations.
Composition. The Committee shall comprise of Association members and will hold regular meetings. Members of the committee shall serve a term of one (1) year. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.c Finance Committee
Meetings. Open only to Committee members.
Duties. Works with the CEO and the Director of Finance to assist in developing the annual budget and in reviewing the Association's financial performance. The committee is responsible for creating, monitoring, and recommending revisions to the Association’s investment policies and reserve policies. The committee will make recommendations to the full Board of Directors regarding the Association’s

financial position. The committee will evaluate needs, consider bids, and make recommendations regarding owned real estate.
Composition. The committee will be comprised of eleven (11) voting members. The committee shall be comprised of the Secretary-Treasurer who will also serve as the Chair, the President-elect, the Immediate Past President, the CPA or a representative from their firm (non-voting), the CEO (non-voting), five (5) Presidential Appointees, and three (3) to be appointed by the Board of Directors from a slate of candidates produced by the Leadership Identification and Development (LID) Committee with consideration of the previous applicants for the Finance Committee. All eight (8) appointed members will serve in two-year staggered terms. The President may attend any meetings of the Finance Committee and serve in a non-voting capacity. After the association elections each fall, the new incoming Secretary-Treasurer will serve as a non-voting member of the committee through the balance of that year.

4.1.d Global Advisory Committee
Meetings. Open to all members. Events open to all members.
Duties. Identify and explore opportunities to expand the global footprint of the Association, both locally and abroad. The goal is to provide a forum for education and networking opportunities for REALTORS® looking to expand their inbound and outbound client base.
Composition. The committee shall be made up of no more than twenty-five (25) members appointed by the President serving a one (1) year term. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.e Government Policies and Issues Committee (GPIC)
Meetings. The Committee and the Government Forum are open to all members.
Duties. May generate, at its discretion, policy recommendations, grants, reports, studies, or internal recommendations regarding governmental issues and forums. Any such action must be in accordance with the Association's Policy Positions document and be approved by the Board of Directors.

Responsible for planning and inviting guest speakers, with the Association staff liaison, to the Government Affairs and Advocacy Forum, to be held periodically, and **open to all members**. This forum is to educate members on issues pertinent to the industry. Committee members will be familiar with, respond to, and/or promote RRAR, NCR, and NAR "Calls to Action".

The committee will be responsible for conducting and attending interviews of candidates running for office within the Association's jurisdiction, which includes drafting online and in-person questions for candidates to answer. Following interviews, the committee shall recommend a Candidate Report to the Board of Directors for approval and designate the RPAC Committee to determine funding levels.

The Chair and Vice Chair for GPIC are expected to attend the NAR REALTORS® Legislative Meetings, unless excused by the President. Travel shall be reimbursed

in accordance with the approved budget. The Committee shall meet monthly or as needed.

This committee will stay informed about reports and information being collected and shared by the LPCs, and will report anything pertinent to the Government Affairs Forum.

Composition. The Committee shall consist of a Chair and a Vice Chair and no more than twenty-one (21) members. No more than three (3) Committee members may be Affiliate members. Members shall serve a three (3) year staggered term, with seven (7) members rolling off each year. The Chair and Vice Chair of this committee shall also serve on the Strategic Planning Committee. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.f Grievance Committee
Meetings. Open only to Committee members.
Duties. Acts as a reviewing body for complaints referred to the Association, determining whether to dismiss or send forward to the Professional Standards Committee for a hearing.
Composition. The committee shall be comprised of no more than thirty-five (35) REALTOR® members. No member of this committee shall serve simultaneously on either the Professional Standards Committee or on the Association's Board of Directors. Members of the committee shall serve a term of two (2) years.
Other. Members of the Grievance Committee must attend an approved training session as soon as possible after appointment to the committee and at least every two (2) years thereafter.

4.1.g Independent Expenditure Committee
Meetings. Open only to Committee members.
Duties. Meets at the discretion of the President. Confidentially identifies potential races for independent expenditures and makes recommendations to the North Carolina Property Rights Fund Board (RPF).
Composition. The committee shall be comprised of five (5) members. Up to three (3) shall be appointed by the Executive Committee, with two (2) to be the Government Affairs Director and the CEO in a non-voting role. Any Association member selected to the North Carolina RPF will automatically serve as one (1) of the three (3) Executive Committee appointments. Members of the Committee shall serve a term of one (1) year.

4.1.h Leadership Identification and Development (LID) Committee
Meetings. Open only to Committee members.
Duties. Identifies, develops, and mentors association members to lead the Association's flexible, efficient, thoughtful, and strategic governance. The Committee has two separate and distinct duties: (1) to certify the qualifications of candidates for the Board of Directors and Officers; (2) to review the Association's leadership development activities and identify new activities and improvements.

The Candidate Qualification Subcommittee identifies, vets, and accepts nominations of one (1) or more candidates to run for each open position. The Subcommittee is made up of at least four (4) committee members who are not running for an officer or director position will review candidates' qualifications to certify they meet all the qualifications as described in the Association's Bylaws Article XI Sections 1 and 3, except that of President, if there is a sitting President-elect based on the criteria and process described in policy Section 2.3 Nominating and Certifying of Directors & Officers. The slate of candidates the Subcommittee has deemed "qualified" will be reported directly to the CEO for inclusion on the official ballot.

The Chair of the LID Committee ratifies the election results with the CEO. The Chair, and/or any other member who oversees the election process or serves on the Subcommittee, is not eligible to run for a Board of Directors or Officer position.

Members of the Committee who are not on the Subcommittee may run for a Board of Directors or Officer position without being removed from the LID Committee.

Composition. The Committee will be comprised of twelve (12) members (including up to four (4) Past Presidents, including the Chair and Past Chair, with the Immediate Past President serving as the Chair. The incoming President shall select members for open terms with the make-up of the committee, including four (4) at-large members and five (5) members from the councils and committees, with only one person representing any particular committee or council. Up to 4 past presidents, including the Immediate Past President (Chair), and the Immediate Past Chair of the committee (the Past President twice removed) may serve on the committee. The incoming Immediate Past President will select two (2) members to fill open terms. All terms, with the exception of the Chair (Past President), will be staggered two-year terms.

4.1.i Legal Action Committee
Meetings. Open only to Committee members.
Duties. *Administer the Legal Action Fund in accordance with the purposes and goals of the Fund as defined in Section 5.5 of this manual.*
Composition. The Committee shall be made up of eleven (11) members consisting of the Policy Rapid Response Committee, the current President, President-elect, Secretary-Treasurer, and Presidential appointee(s), as needed. The President shall serve as Chair of the Legal Action Committee, unless the President is involved in a request, in which case the committee shall be chaired by the next highest-ranking Officer.

4.1.j Personnel Committee
Meetings. Open only to Committee members.
Duties. The Personnel Committee is charged with managing all personnel decisions regarding the Association CEO, including: annual performance reviews, contract renewal and revisions, disciplinary actions or dismissal, and setting the CEO's salary and benefits.
In the event a search for a new CEO is needed, the Personnel Committee is responsible for forming a Search Committee. The Search Committee will consist

of: all members of the Personnel Committee and a minimum of two (2) additional Association Past Presidents appointed by the Chair of the Personnel Committee. The Search Committee will select a Chair at its first official meeting. Before incurring expenses, the Search Committee must obtain approval from the Board of Directors for all costs associated with the search process. The Search Committee will make its recommendation to the Board of Directors for final approval of a new CEO.

Composition. The Personnel Committee will include the current Officers of the Association, the Past President two (2) years removed, and the RRAR representative to the TMLS Board of Directors, with the Past President serving as Chairperson of the Committee. Members of the committee shall serve a term of one (1) year. The Committee shall invite the Association's Human Resources Consultant to participate in all meetings.

4.1.k Policy Rapid Response Committee

Meetings. Open only to Committee members.

Duties. If an urgent issue arises relating to private property rights or the real estate industry, the Committee will make recommendations to the Executive Committee to authorize Association staff or members to engage with elected officials on behalf of the association. Any action taken by the committee will be reviewed by the Government Policy and Issues committee and Board of Directors for informational purposes. The Committee will meet annually or as needed. Participates in candidate interviews. Participates in meetings of the Legal Action Committee (4.1.k).

Composition. The Committee shall be made up of no more than seven (7) members, consisting of the Past President who shall serve as Chair, the Chair of the Government Policy and Issues Committee, the Chair of the Government Policy and Issues Committee Vice Chair, current NCR Legislative Committee members, and up to three (3) Presidential appointments comprised of members serving on the GPIC Committee. Members of the committee shall serve a term of one (1) year.

4.1.l Professional Development Committee

Meetings. Open to all members.

Duties. Works with the Association staff to recommend and review course offerings and/or suggested topics for professional development and seminars.

Composition. The committee shall be made up of eleven (11) members appointed by the President serving a one (1) year term with one (1) member being a current Association Board of Director to serve as a Board liaison. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair. The committee shall meet as needed.

4.1.m Professional Standards Committee

Meetings. Open only to Committee members.

Duties. Responsible for the Judicial Body of the Association. Conducts due process hearings in accordance with the Association's Bylaws on alleged violations of the Code of Ethics, and Arbitration requests according to the Association's Bylaws.

Composition. The committee shall comprise no more than thirty-five (35) REALTOR® members. No member of this committee shall serve simultaneously on either the Grievance Committee or on the Board of Directors. Members of the committee must serve on the Grievance Committee prior to serving on the Professional Standards Committee. Members of the committee shall serve a term of one (1) year. Closed.
Other. All members of the Professional Standards Committee must attend an approved training session as soon as possible after appointment to the committee and at least every two (2) years thereafter.

4.1.n Public Relations & Communications Committee
Meetings. Open to all members.
Duties. Identifies and implements communications with members. Evaluates and monitors the effectiveness of public relations initiatives.
Composition. The committee shall comprise up to fifteen (15) members. No more than two (2) of the members appointed to the committee shall be Affiliate members. Members of the committee shall serve a term of one (1) year. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.o RPAC Committee
Meetings. Open to all members.
Duties. The committee shall actively support RPAC in compliance with North Carolina political fundraising guidelines. The committee's focus shall be on fundraising dollars and educating members about RPAC.

Members shall participate in candidate interviews. Members will evaluate the GPIC Committee "REALTOR® Champion" recommendations along with candidate score cards and candidate interviews to determine which REALTOR® Champions receive funding with RPAC dollars. REALTOR® Champions and their corresponding RPAC funding are sent to the Board of Directors for review, revision, and approval.

The Committee is also responsible for event planning, increasing member participation in RPAC through outreach, and RPAC Major Investor recruitment. The Committee will meet monthly or as directed by the Chair.
Composition. The Committee will be comprised of no more than twenty (20) members appointed by the President and approved by the Executive Committee.

The Committee will consist of the Chair, any current NCR RPAC Trustees, and no more than twenty (20) appointed members. Members of the committee shall serve a term of one (1) year. The President-elect shall serve as a member of the RPAC Committee to gain essential experience in advocacy, fundraising, state PAC compliance, and related matters. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.p Strategic Planning
Meetings. Open only to Committee members.
Duties. No later than March 31st of each year, the Strategic Planning Committee shall meet to create a strategic plan or suggest revisions to the current strategic plan. The plan shall be presented to the Board of Directors no later than the April Board of Directors' meeting. At the discretion of the Executive Committee, one (1) or more facilitators may be employed to assist the committee.
Composition. The committee shall be chaired by the President-elect. The committee shall be made up of no more than thirty-two (32) members, with a minimum of ten (10) current Association Directors and the balance being a diverse cross-section of membership. Members of the committee shall serve a term of one (1) year.

Association staff shall provide the Executive Committee with monthly updates regarding the current status of the Strategic Plan.

4.1.q Sustainability Committee
Meetings. Open to all members. Events open to all members.
Duties. To educate and provide resources for our REALTOR® members. The mission is to benefit clients and communities through education, resources, and advocacy for energy efficiency, utilities, and environmental responsibility.
Composition. The committee shall be made up of twenty (20) members appointed by the President serving a one (1) year term. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.1.r Young Professionals Network (YPN) Advisory Committee
Meetings. Open to all members. Events open to all members.
Duties. To be the voice of young professionals who are focused on personal growth, networking, and association involvement, with a primary focus on helping other young professionals engage in Association activities.
Composition. The Chair and Vice Chair will select other committee members for approval by the Executive Committee. Members of the committee shall serve staggered terms of two (2) years. By the end of September each year, the committee will recommend one or more members for consideration as Vice Chair in the following year. The President-elect will select/certify the Vice Chair.

4.2 Awards Committees and Qualification Criteria

4.2.a Awards Committee
Meetings. Open only to Committee members.
Duties. Review nomination forms and select the Good Neighbor Award and REALTORS® Choice Award recipients based on the criteria on the nomination forms.
Composition. REALTOR® members of the most immediate past REALTOR® of the Year winner, most immediate past Hall of Fame winner(s), most immediate past Presidential Award winner, one (1) Presidential appointee, and one (1) current Association Board of Director. If an Awards Committee Member is nominated for the Good Neighbor Award or the REALTORS® Choice Award, they must either

decline the nomination or accept the nomination and recuse themselves from the Committee. If needed, the President will appoint a replacement.
Qualifications. The Good Neighbor Award is a recognition program that honors Association members who have made significant contributions to their communities through volunteer work and charitable activities. This award acknowledges the efforts of individuals who go above and beyond in serving their communities and who meet the criteria as defined on the nomination form.
The REALTORS® Choice Award highlights individuals who are respected and admired by their colleagues for their professionalism, integrity, and contributions to the industry and who meet the criteria as defined on the nomination form.

4.2.b Hall of Fame Committee
Meetings. Open only to Committee members.
The Hall of Fame Award is intended to honor members who have enhanced our profession by their personal and professional conduct. This award allows for recognition of either current or former members of the Association who have been a REALTOR® member for at least fifteen (15) years. There shall be no more than three (3) inducted per year. Nominees may be submitted by any member of the Association.
Duties. Identifies and honors up to three (3) REALTOR® members who have contributed consistent, outstanding service to the real estate profession.
Composition: One (1) member to be appointed to serve as Chair, two (2) past Hall of Fame Inductees, one (1) current Director, and one (1) at-large member, all appointed by the President. Members of the committee shall serve a term of one (1) year.

4.2.c President's Award
Selection. This award is selected at the discretion of the President to recognize a member who exemplifies dedication to the Association and the real estate industry.

4.2.d REALTOR®-of-the-Year Committee
Meetings. Open only to Committee members.
The nomination form for REALTOR® of the Year will be made available to the membership on or before October 1st of each year. Any member may nominate any other Association member who meets the qualifications by completing the required REALTOR® of the Year Nomination Form and submitting it to the Association staff liaison no later than October 31st each year. Nominations will not be accepted after this date.
Qualifications: The REALTOR® of the Year must be a current member and is an individual who exemplifies the finest attributes of being a REALTOR®, combining service to the profession and to our community, professional competency, fairness, and integrity, and who meets the criteria as defined on the nomination form.
Duties. Identifies a REALTOR® member who, based on the nomination form, exemplifies those who excel in their profession and make a significant impact on their clients, community, association, and the industry.
Composition. The committee shall consist of no more than four (4) REALTOR® members, including the immediate past award winner, who will serve as Chair, and three (3) Presidential appointees, one (1) of which will be a current member of the Board of Directors. Members of the committee shall serve a term of one (1) year.

4.3 Additional Committees, Advisory Groups, and Standing Task Forces

4.3.a Local Political Coordinators (LPC):
Meetings. Open to all members.
Members of the LPC will be assigned to one of the following municipalities: City of Raleigh, Town of Apex, Town of Cary, Town of Fuquay Varina, Town of Garner, Town of Holly Springs, Town of Knightdale, Town of Morrisville, Town of Rolesville, Town of Wake Forest, Town of Wendell, Town of Zebulon, Harnett County and Wake County.

In their role as LPC, committee members are expected to:

a. Have monthly communication(s) with one or more officials from their assigned municipality. This can include, but is not limited to, in-person meetings with Elected Officials, email correspondence with Elected Officials, and attending committee, board, or council meetings.
b. Clearly and directly communicate the Association's position and reasoning for any Calls for Action to Elected Officials.
c. Speak to the needs of REALTORS® and the real estate industry in their assigned municipality.
d. Attend, along with Association staff, any necessary meetings with Elected Officials from their municipality.
e. Communicate information to GPIC regarding their assigned municipality.

Openings for LPC positions will be by application. These applicants will be reviewed by the GPIC Chair and Vice Chair, with input by Association staff, and appointed by the Executive Committee.

4.3.b TMLS Stakeholder Council:
Meetings. Open only to Council members.
Each year, The Association's Executive Committee appoints three individuals to serve on an advisory board for TMLS called the Stakeholders Council. This group provides valuable input to the TMLS Board and helps shape MLS policy and services.
Composition. The Council representatives shall be selected in accordance with the following process: the standard procedure will be to discuss the appointment to the Council at the Executive Committee, with the first option to be to appoint the Incoming President, President-elect, and Past President to serve on the TMLS Stakeholder Council. If any of those officers declines the position, the Executive Committee may appoint any other member to represent the Association.

4.3.c Triangle REALTORS® Leadership Academy (TRLA) Advisory Group:
Meetings. Open only to TRLA members.
TRLA is a year-long program through which REALTORS® and Affiliate members learn essential skills to take on leadership roles in their industry and in the community. The Association will conduct this ongoing program annually or at the discretion of the Board of Directors. Officers, Directors, and Association staff are encouraged to nominate members to apply to participate in TRLA.

An advisory group shall review the applications and determine the participants. The advisory group shall remain confidential in composition and its deliberations.

TRLA meetings shall be held throughout the calendar year and designed to familiarize future Association leaders with all aspects of the REALTOR® family, including NCR and NAR.

4.4 Committee Chair's Responsibilities

Committee Chairs are responsible to the Board of Directors. It is the responsibility of the Committee Chair to ensure that the Committee's recommendations, decisions, and actions are reported to the Board of Directors. Chairs are charged with working closely with their Association Staff Liaison to organize committee members and implement the specific goals and objectives of the committee as established annually by the Board of Directors.

Chair's responsibilities:

a. Preside at committee meetings.
b. Ensures their committees' actions support the objectives of the Association's Strategic Plan.
c. Prepare and approve agendas at least one (1) week before the committee meeting.
d. Prior to the first meeting, set and communicate to all members an attendance policy, recommending that absences not exceed 25 percent of meetings. This policy will be acknowledged by signature by all committee members at the first meeting.
e. Maintain, with assistance from the Association Staff Liaison, accurate and precise committee minutes, member attendance records, and/or reports to be archived at the association. Meeting minutes must be created and reviewed by Association Staff Liaison, Chair, Co-Chair, and/or Vice Chair within ten (10) business days.
f. Consult with the Association Staff Liaison regarding any budgetary needs of the committee.
g. Responsible for actively involving each committee member to ensure their retention and developing their leadership potential. It is essential that Committee Chairs be informed and knowledgeable in areas of the Association that affect their committees.
h. Be familiar with and communicate with committee members the importance of Association Bylaws, Policies, procedures, and Robert's Rules of Order, latest edition.
i. Be educated on Antitrust and Fair Housing laws and communicate or have them communicated at every meeting.
j. Make recommendations for future committee membership to the President.

4.5 Association Staff Liaisons to Committees

Association Staff Liaisons are responsible for assisting Committee Chairs with communications and correspondence, taking attendance, meeting preparation, and keeping detailed records of the revenues and expenses for their respective committees.

SECTION 5: LEGAL

5.1 Errors and Omission Insurance Coverage

The Association is covered by Professional Liability and Errors and Omissions Insurance as prescribed by NAR. Coverage is based on the Association's compliance with NAR's policies and recommendations. Failure to comply will result in loss of coverage. It shall be the policy of the Board of Directors to take required actions to remain in compliance with NAR policies and recommendations.

5.2 Contracts

With the consent of the Executive Committee, the CEO and President may sign contracts that are binding upon the Association. The CEO may also designate pre-approved individuals of the Association Staff Team the ability to sign contracts, with review and written approval by the CEO. The names of any individual permitted to sign contracts, as deemed by the CEO, must be provided to the Board of Directors upon implementation of this policy and any time a change or addition is made during the year.

5.3 Legal Counsel & CPA

The Association shall engage the services of Legal Counsel to counsel the Association relative to matters of interest to the Association that have legal implications. Legal Counsel shall initiate action only after approval of the President or the CEO.

The Association shall engage the services of a CPA to perform annual audit and other matters of financial interest.

The only persons authorized to contact the attorney and/or the CPA, at the Association's expense, are the elected Officers, the CEO, and/or authorized Association staff.

If an individual member contacts the attorney and/or the CPA, they should be told that the attorney and/or CPA will only spend time on their inquiry if the individual member involved is willing to pay for that time. Furthermore, the attorney and/or CPA may discuss only those matters that the Board of Directors authorizes them to discuss.

Legal Counsel and the CPA are employed on a fee basis and are to be reviewed annually by the Executive Committee.

5.4 Antitrust Compliance

The Association does not fix, control, recommend, suggest, or maintain commission rates or fees for services to be rendered by members or any percentage of division of commissions or fees between cooperating members or non-members.

Therefore, there shall be no discussion at any time by the Board of Directors, committees, councils or Association staff concerning these matters as described. It is recommended to Association members that no discussion of these matters take place in any group meetings of Association members, even when such a meeting is not connected, in any manner, with the Raleigh Regional Association of REALTORS®, Inc.

To ensure continued compliance with federal and state antitrust laws and the National Association of REALTORS®' guidance on antitrust compliance:

- The Association's approved Antitrust Statement shall be read at the beginning of every meeting, including virtual meetings, of the Board of Directors, each committee, and the councils of the Raleigh Regional Association of REALTORS®.
- Meeting agendas shall include the Antitrust Statement as a standing agenda item.
- Any discussion that could reasonably be interpreted as violating antitrust laws shall immediately cease, and the President, Chair, Vice-Chair or professional team shall immediately redirect the discussion to an appropriate topic and if any improper discussions continue the President, Chair, Vice-Chair or professional team shall end the meeting and report the matter to either the RRAR CEO or RRAR legal counsel.
- Meeting minutes shall reflect that the Antitrust Statement was presented.

5.5 Legal Action Fund

A program of the Association known as the Legal Action Fund is hereby established.

5.5.1 Purpose and Function

a. The principal function of the Legal Action Fund shall be to establish and administer the Fund, so as to best achieve the purposes and goals of the Fund. These purposes and goals are:
    i. Promote amongst the Association’s members an understanding of their rights and duties under federal, state, and municipal law, and to defray the expense of legal advice to that end.
    ii. Provide financial resources and other assistance to parties, including but not limited to the Association and its collective Officers, Directors and other persons acting in an official capacity on their behalf and the members of the Association, engaged in litigation, actual or proposed, or administrative action which may result in the determination of the relevant legal issues in a manner that may have important precedential significance to members, real estate licensees, real estate associations, private property owners or the real estate industry generally. Assistance may be provided only to cases that meet the Criteria for Case Support set forth in 5.5.3.

iii. Preparation and filing of amicus curiae briefs in appropriate cases as recommended by the Legal Action Committee.
iv. Defray the administrative costs and fees of the Association in connection with its involvement and participation in the Legal Action Fund in furtherance of the above- enumerated objectives.

b. The Legal Action Fund shall be funded in accordance with the Reserve Policy.
c. The Legal Action Fund shall be administered by the Legal Action Committee and the Board of Directors.
    i. The Committee shall be made up of eleven (11) members consisting of the Policy Rapid Response Committee, the current President, President-elect, Secretary-Treasurer, and Presidential appointee(s), as needed.
    ii. The President shall serve as Chair of the Legal Action Committee, unless the President is involved in a request, in which case the committee shall be chaired by the next highest-ranking Officer.
    iii. Meetings shall be held at the call of the Chair.
d. The Legal Action Committee shall have the authority to authorize expenditures from the Legal Action Fund. All decisions, recommendations, expenditures, and disbursements of the Legal Action Committee and all disbursements from the Legal Action Fund shall be approved by the Board of Directors at the next scheduled meeting.
    i. All disbursements from the Legal Action Fund shall be submitted to the Secretary-Treasurer and the Association's finance department and paid by Association staff as directed by the Legal Action Committee upon the satisfaction of all contingencies, conditions, or prerequisites imposed by the Committee.
e. Any changes to the Legal Action Committee's purposes, goals, and responsibilities must be approved by the Board of Directors.

5.5.2 Requests for Assistance

a. All requests for assistance from the Legal Action Fund must be (1) in writing on the form prescribed by the Legal Action Committee; and (2) filed with the CEO. Upon receipt of a written request for assistance as set forth herein, the CEO shall notify the Legal Action Committee of the request.
b. The Legal Action Committee, in collaboration with the Legal Counsel to the Association, or other counsel as deemed necessary, shall study the merits and implications of each request for assistance. Factors to be considered by the Legal Action Committee in acting upon requests for assistance shall include: whether the requesting parties are subject to threatened or actual litigation or administrative action by federal or state agencies; whether the requesting parties are the subject of threatened or pending litigation where the subject matter thereof could have statewide significance; the method and manner in which the requesting parties intend to handle the matter; and any other factors which the Legal Action Committee deems proper to consider.
c. The requesting parties and/or their representatives may appear before the Legal Action Committee in support of their request and answer any questions posed by the Legal Action Committee. The Legal Action Committee will make its decision in Executive Session. The deliberations are confidential; the decision is not. A

written notification of the Legal Action Committee's decision will be furnished to the requesting parties within 1-2 weeks following the conclusion of the meeting.

d. Any reconsideration of requests for assistance shall be based on information not presented at the time of the original presentation of the request to the Legal Action Committee.

5.5.3 Criteria for Case Support

a. A case is eligible for consideration by the Legal Action Committee if it:
    i. Relates to governmental agency action or investigation or to litigation, actual or proposed, which presents an opportunity for clarifying precedent on issues of significance to the Association, or the Association's membership; OR
    ii. Involves issues designed to promote or defend the private property rights of members, the public, or others concerned with the protection of private property.
b. Cases supported must clearly evidence the potential for industry-wide and local, and even statewide, impact on real estate-related matters, the operation of the REALTOR® association, its MLS, or other private property rights.
c. Support is not available for cases that will affect only the particular litigants or affect only the law of a particular local jurisdiction, unless it can be shown that the cases nevertheless have such industry and local-wide significance.
d. Financial support must be used for legal fees and expenses of the party supported. It may not, in any case, be used to pay judgments, damages, fines, or settlements, or to pay the legal fees of opposing counsel or costs of any other party.
e. It is not a prerequisite of support that the litigants' Broker in Charge and/or Company provide financial support to the case, but the Legal Action Committee may make its support of a case conditional on the Broker in Charge and/or Company also providing funding.
f. The Legal Action Committee reserves the right to impose contingencies, conditions and/or prerequisites on support as it deems necessary or desirable, in its sole discretion, including, but not limited to, requiring verified statements of expenses at least equal to authorized disbursements from the Legal Action Fund for any supported case, and that the Association be consulted on a current and continuing basis concerning decisions relating to the litigation which is being supported. Failure to satisfy such contingencies, conditions, and/or prerequisites may result in the immediate suspension of all support of the litigation and the termination of such support if the recipient of support fails to justify such failures or otherwise satisfy the Legal Action Committee that support should be continued.

5.6 Harassment Policy

The Association is committed to maintaining a professional environment free from discrimination, and in which members and Association staff at all levels can devote their full attention and best efforts to the Association activities. The Association does not authorize and will not tolerate any form of harassment on the following factors:
Race, color, religion, sex, disability, familial status, national origin, sexual orientation, gender identity, or any other characteristic that is protected by law.

Examples of "harassment" that are covered by this policy include offensive language, jokes or other physical, verbal, written or pictorial conduct relating to the individual's race, color, religion, sex, disability, familial status, national origin, sexual orientation, gender identity or any other characteristic that is protected by law would make a reasonable person experiencing such behavior feel uncomfortable or harassed.

It is impossible to list every type of behavior that can be considered harassment in violation of this policy. In general, any conduct that could create an offensive environment will be considered harassment in violation of this policy. This is the case even if the offending party did not mean to be offensive. It is essential that all members and staff be sensitive to the feelings of others.

Sexual Harassment

Individuals (including vendors, customers, and visitors) are prohibited from harassing employees, Individuals, and other covered persons based on that individual's sex or gender (including pregnancy and status as a transgender or transsexual individual) and regardless of the harasser's sex or gender.

Sexual harassment means any harassment based on someone's sex or gender. It includes harassment that is not sexual in nature (for example, offensive remarks about an individual's sex or gender), as well as any unwelcome sexual advances or requests for sexual favors or any other conduct of a sexual nature.

The Association will not tolerate any form of sexual harassment, regardless of whether it is verbal (for example, epithets, derogatory statements, slurs, sexually-related comments or jokes, unwelcome sexual advances, or requests for sexual favors), physical (for example, assault or inappropriate physical contact), visual (for example, displaying sexually suggestive posters cartoons or drawings, sending inappropriate adult-themed gifts, leering, or making sexual gestures), or online (for example, derogatory statements or sexually suggestive postings in any social media platform including Facebook, Twitter, Instagram, Snapchat, etc.). This list is illustrative only and not exhaustive. No form of sexual harassment will be tolerated.

Harassment is prohibited both at the Association workplace and at Association-sponsored events off premises.

Reporting Harassment

The Association can only resolve matters of which it is aware. Any individual who feels they have been harassed or has witnessed harassment has a duty to immediately report the alleged harassment so that it may be investigated, and appropriate action taken. This is true whether the alleged harasser is an Association staff member, association member, Officer, or Director.

To report alleged harassment, contact the President. In the case that he or she is the subject of the allegation, contact the next highest-ranking Officer.

Once received, a prompt and thorough investigation will be conducted.

Complaint Procedure: Any member or employee who believes that they have suffered harassment by any member or Association staff must bring the problem to the attention of the President or CEO and communicate it to other members of the Executive Committee. The initial complaint does not have to be filed in writing; however, at some point, the details of dates, times, places, and witnesses, if any, to the alleged harassment may be required to be documented in writing.

All complaints will be investigated promptly and with strictest confidentiality by an investigatory team comprised of the President, President-elect, and one (1) member of the Board of Directors selected by the highest-ranking officer not named in the complaint after consultation with the Association's legal counsel. If the complaint involves the President or President-elect, they shall be replaced on the investigatory team by the Immediate Past President or, alternatively, by another member of the Board of Directors selected by the highest-ranking officer not named in the complaint.

Both the complainant and the accused will be provided with a full opportunity to present their cases. Witnesses interviewed will be provided only with the information necessary to elicit from them their observations and other relevant information.

The investigatory team shall impose disciplinary action against any member found to have harassed another member or Association staff, which may consist of any sanction authorized in the National Association of REALTORS® *Code of Ethics and Arbitration Manual*, such as verbal or written warning, required education, probation, suspension, or expulsion, depending on the gravity of the incident. Prior incidents of similar behavior shall be considered when determining the appropriate disciplinary action. The decision shall be made by the investigatory team.
A preponderance of evidence shall be the standard of proof by which alleged allegations of harassment are determined. Preponderance of the evidence shall be defined as evidence which is of greater weight or more convincing than the evidence which is offered in opposition to it; that is, evidence which, as a whole, shows that the facts sought to be proved are more probable than not.

It is contrary to Association Policy for a member to retaliate against anyone who files a harassment charge. All possible steps will be taken to eliminate the possibility of retaliation resulting from the filing of a complaint.

If either party wishes to appeal the decision, they may do so, but only on the grounds of a lack of due process or procedural irregularity. The decision of the investigative team is final and not subject to appeal, but may be reconsidered if it is determined that a procedural irregularity or lack of due process occurred. Appeals must be made in writing to the CEO, who will review with the Association's legal counsel the basis for the appeal and either uphold the decision or refer the matter back to the investigative team for further review and consideration.

5.7 Whistleblower Policy

Whistleblower Policy Purpose.
The purpose of this Whistleblower Policy is to: (1) encourage Association staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the Association; (2) specify that the Association will protect the person from retaliation; and (3) identify where such information can be reported.

Encouragement of reporting.
The Association encourages complaints, reports, or inquiries regarding illegal practices or serious violations of the Association's policies, including illegal or improper conduct by the Association itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy include violations of law, financial improprieties, accounting or audit irregularities, harm to public health or safety, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which the Association has existing complaint mechanisms or policies should be addressed through channels described in those mechanisms or policies, such as raising matters of alleged discrimination or harassment, unless those channels are themselves implicated in the wrongdoing. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

Protection from retaliation.
The Association prohibits retaliation by or on behalf of the Association against Association staff or volunteers for making good faith complaints, reports, or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The Association prohibits retaliation against staff and volunteers for refusal to participate in an activity that would result in a violation of local, state, or federal law. The Association will not retaliate against a staff member or volunteer who discloses or threatens to disclose to a supervisor, director, vice-president, the chief executive officer, or law enforcement agency or other governmental agency, any activity, policy, or practice of the Association that the person reasonably believes is in violation of a local, state, or federal law. The Association reserves the right to discipline Association staff or volunteers who make bad faith, knowingly false, or vexatious complaints, reports, or inquiries, or who otherwise abuse this policy.

Where to report.
A complaint, report, or inquiry may be made under this policy on a confidential or anonymous basis. It will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation. The complaint, report, or inquiry should describe in detail the specific facts demonstrating its basis. A complaint, report, or inquiry by Association staff should be directed to a direct supervisor and ultimately the CEO; if this person is implicated in the complaint, report, or inquiry, it should be directed to the President. A complaint, report, or inquiry by a volunteer member should be directed to the President and, if the President is implicated in the complaint, report, or inquiry, it should be directed to the President-elect or CEO. In both cases, the Association's legal counsel should be made aware of the report.

The Association will conduct a prompt, discreet, and objective review or investigation. Association staff or volunteers must recognize that the Association may be unable to fully evaluate a vague or general complaint, report or inquiry that is made anonymously.

5.8 Record Retention Policy

Accident Reports and Claims (settled cases)	10 years
Audit Reports	Permanently
Bank Reconciliations	1 year
Capital Stock and Bond Records (ledgers, transfer register, stubs showing, issues, record of interest coupons, options and so forth)	Permanently
Cash Receipt Records	3 years
Charts of Accounts	Permanently
Checks (Canceled; See Exceptions Below)	3 years
Checks (Canceled for Important Payments) *Such as: taxes, purchases of property, special contracts and so forth. Checks should be filed with the papers pertaining to the underlying transaction	Permanently
Compliance Rules/Regs (TMLS)	1 year
Continuing Education Documents	3 years
Contracts and Leases (Expired)	7 years
Contracts and Leases (Still in Effect)	Permanently
Corporate Documents (including Bylaws, Charter and Governing Documents)	Permanently
Correspondence (General)	3 years
Correspondence (Legal and Important Matters)	Permanently
Deeds, Mortgages and Bills of Sale	Permanently
Deposit Slips	1 year
Depreciation Schedules	Permanently
Employee Personnel Records	4 years
Employment Applications	4 years
Financial Statements (End-of-Year)	Permanently
General and Private Ledgers (and end-of-year trial balance)	Permanently
Grievance/Professional Standards Documents *At minimum, all professional standards records should be retained until the appeal or procedural review period has expired. Ethics proceedings will be retained permanently in the respondent's membership file	21 days
Insurance Policies (Expired)	3 years
Insurance Policies (Current) (accident reports, claims, policies and so forth)	Permanently
Inventories (Products, Materials & Supplies)	3 years
Invoices From Vendors	3 years
Membership Records	Active Only
Minute Book of Director (Including stockholders, Bylaws and Charter)	Permanently

NAR/NCR Payment Records	2 years
Occupational Inquiry and Illness Records	5 years
Payroll Records and Summaries (Including payments to pensioners)	4 years
Petty Cash Vouchers	3 years
Postage Records	1 year
Property Records (Including costs, depreciation reserves, end-of-year trial balances, blueprints and plans)	Permanently
Publications (REALTOR® Review)	Permanently
Purchase Orders	3 years
Reorganization Records	Permanently
Rosters	Permanently
Sales Records	3 years
Tax Returns and Worksheets	Permanently
Termination Records	Permanently

5.9 Leadership/Conflict of Interest Policy

Service as a leader for the Association gives rise to certain legal obligations to the Association. One obligation is the fiduciary duty owed by the leader to the Association. It requires the exercise of reasonable care in performing duties to the Association, exhibiting honesty and good faith, and encompasses the responsibilities of both care and loyalty. The duty of loyalty requires Association leaders to avoid conflicts of interest and look out for the Association's best interests, not their own.

A conflict of interest may exist when one participates in the decision-making process on an Association issue, while concurrently having other business, professional, or personal interests that could tend one toward bias or predisposition on the issue. The fiduciary duty of a leader also requires avoiding the appropriation of programs and activities, particularly business prospects that properly belong to the Association. **RRAR leaders must also maintain the confidentiality of** Association **information.**

Even where the Association leader might be appointed or elected regionally or by virtue of the leader's professional position within a particular organization or practice area, **the obligations of the leader are to the Association as an organization, not to the leader's constituency.** The following policies apply to all Association leaders, including but not limited to Officers, Directors, and members of all Association decision-making bodies, such as the Board of Directors or the Executive Committee.

Conflict of Interest Policy
According to *Black's Law Dictionary*, a conflict of interest is defined as "A term used in connection with public officials and fiduciaries and their relationship to matters of private interest or gain to them." Any Association leader will be considered to have a conflict of interest whenever that leader:

a. Is a principal, partner, officer, director, member, manager, or greater than one percent (1%) owner of a business providing products or services to or competing with the Association;

b. Is a principal, partner, officer, director, member, manager, or greater than one percent (1%) owner of a business being considered as a provider of products or services to or competing with the Association; or
c. Holds any unique and substantial interest in a business, financial, or otherwise, such as a familial, personal, employer-employee, contractor-contracted, shareholder, or governance relationship with the business.

Any Association leader with a potential conflict of interest must immediately disclose their interest at the outset of any discussions by a decision-making body pertaining to the potential conflict.

Such Association leaders shall be excused from such discussion unless otherwise requested by the board of directors and shall respond to any questions asked of them. Furthermore, no Association leader with a conflict of interest may vote on any matter in which the leader has a conflict of interest, including votes to block or alter the actions of the decision-making body to benefit the business in which they have an interest. Minutes of appropriate meetings shall reflect that such disclosure was made, and that the leader excused himself or herself from the discussion of the pros and cons and vote on the matter.

Financial/Ownership Disclosure Policy
If the Association leader has personal knowledge that the Association is considering doing business with an entity in which the leader has any financial or ownership interest, then such leader must disclose his or her financial or ownership interest.

If the Association leader has a financial or ownership interest in an entity that the leader knows is offering competing products and services as those provided by the Association, then such leader must disclose the existence of his or her financial or ownership interest.

Association leaders with a financial or ownership interest must disclose their interest at the outset of any discussions by a decision-making body pertaining to the business or any of its products or services. The leader shall be excused from such discussion unless otherwise requested by the Board of Directors and shall respond to any questions asked of him or her. Furthermore, no leader has a financial or ownership interest, including the ability to block or alter the actions of the decision-making body in order to benefit the Business in which he or she has an interest. Minutes of appropriate meetings shall reflect that such disclosure was made, and that the leader excused himself or herself from the discussion of the pros and cons and vote on the matter.

Corporate Opportunities Policy
Any leader who learns of a business opening, investment, project, or program through his or her service to the Association may not pursue that opportunity outside of the Association without first offering it to the Association. Only if the Association decides not to proceed (i.e., abandons the corporate opportunity) may he or she proceed independently of the Association.

NOTE: No leader is prohibited from engaging in conduct in the same general line of commerce as the Association, but he or she must conduct his or her own activities in good faith and without injury to the Association. For example, assume that part of your

service on a committee entails the development of an educational course to be delivered to Association members. It would be a violation of this policy to take the work of the committee and use it to create an educational course for your personal financial gain.

Confidential Information Policy
All leaders must (a) maintain in confidence and not disclose or cause to be disclosed to anyone, other than the Association, any information designated as confidential at the Association's sole discretion; prior to or during deliberation by the Association; (b) keep any materials containing confidential information in a safe and secure place to protect against inadvertent disclosure; and (c) preserve confidential information indefinitely, even after expiration of the leader's service. Upon expiration of the leader's service, the leader must promptly return to the Association staff, upon request, any materials containing confidential information sent to or acquired by the leader relating to the leader's work for the Association. For example, assume that the executive committee, during its search for a CEO, designates the deliberations as "confidential" to preserve the integrity of the search. It would be a violation of this policy for members of the committee to disclose such deliberations to anyone outside the committee except as may be required to conduct the committee's business or as required by law.

Service Statement
Any person serving the Association in an elected or appointed position must sign a service statement in a form designated by the Association prior to serving.

SECTION 6: FINANCE

6.1 Authorized Signatures

The Secretary-Treasurer, President, CEO, and an additional Association staff member shall have the authority to sign checks, initiate electronic payments, and financial documents for the Association.

Signature authorization cards will be updated annually to add the Secretary-Treasurer to the Association's operating account, and a resolution will be filed annually by Association staff with all banks and savings institutions in which the Association maintains accounts.

6.2 Financial Information Disclosure to Members

Member access to financial information of the Association is defined under *9.3 Members' Access to Meetings and Materials*.

6.3 Annual Operating Budget (Amended 8/2013)

The Secretary-Treasurer shall prepare the Association's Annual Operating Budget with the assistance of the CEO and the Finance Committee. The Annual Operating Budget shall be a zero-based budget. The Secretary-Treasurer shall present the annual budget to

the Board of Directors at the October or the November Board of Directors' meeting. Approval of said budget shall occur no later than the December Board of Directors meeting as required in the Association's Bylaws.

The CEO may expend up to $25,000 annually, which would exceed the approved budget without the Secretary-Treasurer's review and approval by the Executive Committee.

When planning the annual budget, the Secretary/Treasurer shall evaluate and consider any economic factors that may affect the income from membership dues. The budget should align with the current strategic plan, specific goals or programs projected for implementation during the coming year, and the evaluation of the Association's existing programs and services.

6.4 Financial Reserve Policy

a. The **General Operating Reserve Fund** of the Association is to be an amount not less than twenty-five percent (25%) and not to exceed seventy-five percent (75%) of the Association's annual Operating Expenses, averaged using the previous two (2) years of annual operational expenses. Funds in excess of the established General Operating Reserves and other dedicated reserves will be expended at the recommendation of the Finance Committee and by approval of the Board of Directors for the reduction of long-term debt, to offset an unapproved deficit budget or for the betterment of the Association and its members through providing for the operations and initiatives of the Association.

b. In addition to the General Operating Reserve Fund, the following reserve funds may be funded exceeding the requirements set forth in section A above, as recommended by the Finance Committee and approved by the Board of Directors:

    1. **Capital Assets Fund** not to exceed $500,000.00 – these reserves will be expended for the acquisition of capital assets or asset improvements and will be expended at the recommendation of the Finance Committee and by approval of the Board of Directors.

    2. **Legal Action Fund** not to exceed $100,000.00 – these reserves will be expended to defray the costs associated with legal action involving the Association or one of the Association's members in matters of legal precedence related to private property rights and/or the practice of real estate. This fund will be administered by the Legal Action Committee in accordance with the policies in Section 5.5 of this Manual.

    3. **Ray Larcher Opportunity Fund** not to exceed $50,000.00 – these reserves will be expended to allow the Association to capitalize on opportunities presented to it and will be expended by approval of the Executive Committee.

c. All Association reserves will be invested by a professional money manager approved by the Board of Directors and in accordance with the approved investment policies. The Finance Committee will be responsible for monitoring

the performance of the invested reserves at least semi-annually and recommending changes to the investment policy. (See Investment Policy in Section 18.)

Note: General Operating Reserves shall be calculated as of December 31st as:
Total Cash and investments – (Total Current Liabilities - Prepaid Dues)

To maximize earnings, the brokerage account shall maintain an amount of operating reserves as suggested by the Finance Committee, with a required mid-year review to assess the current needs of the Association.

The Finance Committee should consider the Association*'s budgeted projections before voting on any additional investments or withdrawals from the account, which, if passed, would proceed to the Board of Directors for approval.*

Operating Expenses shall be calculated for the period ending December 31st based on the unaudited financial report.

6.5 Capitalization

This policy establishes the minimum cost (capitalization amount) that shall be used to determine the capital assets that are to be recorded in the Association's annual financial statements.

A Capital Asset is defined as a unit of property that: (1) has an economic useful life that extends beyond 12 months; and (2) was acquired or produced for a cost of $2,500 or more, and will be the threshold for minimum capitalization. Any items costing below this amount should be expensed in the Association's financial statements.

All Capital Assets are recorded at historical cost as of the date acquired. Tangible assets costing below the threshold amount are recorded as an expense in the Association's annual financial statements. Assets with an economic useful life of 12 months or less are required to be expensed for financial statement purposes, regardless of the acquisition or production cost.

Invoices substantiating an acquisition cost of each unit of property shall be retained for a minimum of 4 years.

6.6 Petty Cash

The Association shall maintain a petty cash fund in an amount necessary for minor miscellaneous expenses of the Association. The CEO or Department Manager shall authorize disbursements from petty cash.

6.7 Dues Refunds

a. The Association will issue refunds only in cases of overpayment. The Association will consider refunds for cancellation of membership, prior to the upcoming fiscal year, if received by December 31st.

b. Upon request by a member, or on behalf of a member, who experiences extreme hardships, which can be documented, may request a waiver of the local portion of their dues to be considered by the Executive Committee.

6.8 Non-Payment, Reactivation Fees, and Insufficient Funds

The Association reserves the right to charge a reactivation fee in the amount of $100 for dues not paid by the specified due date. For members whose payments are returned by their bank for insufficient funds, a penalty of $25 will be charged to the member.

Any Association dues payments not paid by the due date will result in the membership being placed in inactive status. However, no action shall be taken to suspend or expel a member for nonpayment of disputed amounts until the accuracy of the amount owed has been confirmed by the Board of Directors.

A former member who has had his/her membership terminated for nonpayment of dues, fees, fines, or other assessments duly levied in accordance with the provisions of these Bylaws or the provisions of other rules and regulations of the association or any of its services, departments, divisions, or subsidiaries may apply for reinstatement in a manner prescribed for new applicants for membership, after making payment in full of all accounts due as of the date of termination.

6.9 Annual Audit

An annual audit of the Association's bookkeeping, accounts, and financial records shall be conducted by a Certified Public Accountant after the close of the fiscal year, or upon approval of the Board of Directors at such other times as may be required. The results of the Audit shall be presented to the Board of Directors and the membership as required by the bylaws.

6.10 Contributions

Association contributions to various charitable causes, 501c3 organizations, or individuals shall not be taken from the Association's financial reserves. The current operating income in any fiscal year shall be the only source for such contributions, unless a fund-raising drive is conducted for a stated purpose.

There shall be a limit to the total amount of Association contributions each year, not to exceed two and a half percent (2.5%) of the Association's budgeted revenues. The general purpose for all contributions shall be related to the real estate industry and community enrichment**,** in some manner.

6.11 Travel Reimbursement

Any reasonable travel expenses incurred on behalf of the Association shall be reimbursed in accordance with the **approved budget**. If there is a question about an expense, the Executive Committee will determine reimbursement. All travel reimbursement requests shall be submitted within forty-five (45) days after the end of the event. If a member is

also being reimbursed or compensated by another organization, such as TMLS, NAR, or NCR, they are eligible for RRAR reimbursement only for expenses not covered by other organizations.

6.11a Officer Travel Reimbursement
Association Officers are expected to attend the NC REALTORS® Winter Meetings, NC REALTORS® Legislative Meetings, and NCR Convention in addition to the NAR REALTORS® Legislative Meetings, and NAR NXT. The President-elect will attend the annual NAR Leadership Summit in August.

6.11b NCR Director Travel Reimbursement
NCR Directors are expected to attend the NC REALTORS® Winter Meetings, the NCR Legislative Meetings, and the NC REALTORS® Convention. Travel shall be reimbursed in accordance with the approved budget. To be eligible for reimbursement of reasonable expenses following the meeting, NCR Directors must attend the Regional Caucus and the Board of Directors Meetings. Directors may be excused from attending the Regional Caucus if they serve on an NCR Committee or Task Force that has a conflicting meeting time.

6.11c NAR Director Travel Reimbursement
NAR Directors are expected to attend the NAR REALTORS® Legislative Meetings and NAR NXT. Travel shall be reimbursed in accordance with the approved budget. To be eligible for reimbursement of reasonable expenses following the meeting, NAR Directors must attend the NAR Region Caucus and the NAR Board of Directors meeting.

6.11d Additional Travel Reimbursement
If not eligible for reimbursement by NAR or NCR, the following members may be reimbursed for travel on behalf of the Association.

a. The Chair and the Vice Chair of GPIC shall be reimbursed for reasonable expenses for attendance at the NAR REALTORS® Legislative Meetings and NAR NXT in accordance with the approved budget.

b. The Chair and the Vice Chair of the Young Professionals Network Committee (YPN) shall be reimbursed for reasonable expenses for attendance at the NAR YPN Leadership Retreat in accordance with the approved budget.

SECTION 7: VIOLATIONS OF POLICIES

Any violation of these policies by a Member may result in discipline by the Board of Directors after a hearing, as described in the Code of Ethics and Arbitration Manual of the National Association of REALTORS®, provided that the discipline imposed is consistent with the discipline authorized by the Professional Standards Committee of the National Association of REALTORS® as set forth in the Code of Ethics and Arbitration Manual of the National Association of REALTORS®.

Any violation of these policies by Association staff may result in appropriate discipline as determined by the CEO or otherwise pursuant to the Association's employee handbook or any other policy, procedure, or agreement applicable to any member of the Association staff.

SECTION 8: COMMUNICATIONS

8.1 Association Staff Communications with the Public

PHONE CALLS REGARDING COMMISSION RATES OR BROKERAGE RECOMMENDATIONS

a. When a phone call is received at the Association requesting information on commission rates in the area, Association staff shall advise the caller that there is no fixed commission rate and that the compensation for services rendered in respect to any listing is solely a matter of negotiation between the broker and the clients. It is not fixed, controlled, recommended, or maintained by anyone who is not a party to the listing agreement.

PHONE CALLS RELATIVE TO AGENT PROFILE INFORMATION

b. Should the Association receive a phone call pertaining to an agent's profile or contact information, that information will not be conveyed to the caller. The caller will be directed to the Association's website, where they may look up individual REALTOR® Members.
c. Under no circumstances are staff allowed to distribute in any format or quantity the confidential contact information of any Association member.

REQUEST FOR COMPANY RECOMMENDATIONS

d. When a call is received asking for a recommendation for a company, Association staff will follow these procedures:

    i. Advise the caller that the Association cannot recommend one member over another.
    ii. If the caller has a company in mind, Association staff may advise whether the company is a REALTOR® Member and/or a participant of MLS.
    iii. Association staff will not give statistics on who sells the most property or who is the largest firm.
    iv. Association staff will refer the caller to an Internet search if they are interested in companies that specialize in certain facets of the industry.

8.2 Association Social Pages and Groups

a. Social media pages and groups administered by the Association are places for Association staff to interact with Members, consumers, the media, and other key constituencies, and share information about real estate and the Association.

b. The information provided on these pages is for educational and informational purposes only. The information should not be construed as a recommendation by the Association for any course of action regarding financial, legal, or accounting matters. It is not meant as a substitute for professional advice from a qualified legal, accounting, or financial professional.
c. The Association does not represent, warrant, or endorse the accuracy or reliability of any information displayed, uploaded, downloaded, or distributed through this page by any user, or any other person or entity. The Association disclaims liability for any damages or losses, direct or indirect, that may result from use of or reliance on information contained on the page.
d. Social media pages and groups used by the Association are for member and consumer communications only, and will not be used for other purposes under any circumstances unless otherwise expressly written. Association staff reserves the right to remove any content that does not adhere to this policy.

8.3 Responsible Use of Social Media

a. The Association respects the rights of individuals using social media to voice their views and opinions. However, on the Association's social media channels, Association staff reserves the right to remove comments that are considered inappropriate, off-topic, abusive, or are being used to promote listings or solicit for third-party sites, initiatives, or products.
b. Apart from personal use of social media in accordance with this policy, the Association encourages its staff and members to participate responsibly in these media as a means of generating interest in the Association's services and creating business opportunities, so long as all of the Association's rules and guidelines regarding social media usage, particularly in a business context, are adhered to.
c. Social media should never be used in a way that violates any other Association policies or employee obligations. If social media activity violates any of the Association's policies in another forum, it will also violate them in an online forum.
d. Circulating or posting commercial, personal, religious, or political solicitations, chain letters, spam, or promotion of outside organizations unrelated to Association business are also prohibited during working time unless otherwise protected or required by law.

8.4 Disclosures and Conflicts

a. Association staff should also never provide references or recommendations for stakeholders on social or professional networking sites, as such references or recommendations can be attributed to the Association and create legal liability for employees and the Association (such as interference with prospective business contracts and allegations of wrongful termination).
b. Association staff should always disclose that they are Association employees when promoting our products/services on social media platforms.

8.5 No expectation of privacy; Association ownership of data

a. All contents of the Association's IT resources and communications systems are the property of the Association. Therefore, users of the Association's IT resources and communications systems should have no expectation of privacy in any message, files, data, document, facsimile, telephone conversation, social media post, conversation or message, or any other kind of information or communications transmitted to, received or printed from, or stored or recorded on the Association's electronic information and communications systems.
b. Users of the Association's IT resources and communications systems are expressly advised that in order to prevent misuse, and maintain production and discipline, the Association reserves the right to monitor, intercept, and review, without further notice, all activities using the Association's IT resources and communications systems, including but not limited to social media postings and activities, and each such user consents to such monitoring by using of such resources and systems. This might include, without limitation, the monitoring, interception, accessing, recording, disclosing, inspecting, reviewing, retrieving, and printing of transactions, messages, communications, postings, logins, recordings, and other uses of the systems as well as keystroke capturing and other network monitoring technologies.
c. The Association may also store copies of such data or communications for a period of time after they are created and may delete such copies from time to time without notice. Do not use the Association's IT resources and communications systems for any matter that you desire to be kept private or confidential from the Association. Note that the Association owns all social media accounts used on behalf of the Association or otherwise for business purposes, including any login information, passwords, and content associated with each account, such as followers and contacts.

8.6 Website and Email Policy

a. The Association will maintain an up-to-date and professional website to educate the public on the value of using a REALTOR®, facilitating connection of members of the public to a REALTOR® for their use, and displaying regularly updated and relevant blog posts on homeownership and market statistics for the use of website visitors.
b. The Association will maintain an up-to-date list of current Association staff and contacts, and provide access to all appropriate Association governance documents.
c. Email will be used by Association staff as the primary method for member communications. Members should make every reasonable effort to ensure that contact information found in their profiles is accurate and up to date. Emails will be sent to all members to update them on events happening at the Association, relevant and timely news items, and updates on important items as deemed necessary.
a. The Association abides by all federal and state laws when it comes to communications via electronic mail. If a member wishes to no longer receive these communications, the Association staff will remove them immediately upon

request. If a member wishes to be added back to the email communications list, it is the member's sole responsibility to request this.

d. Access to email lists and website communications is strictly given to Association staff. Association staff reserve the right not to distribute any content they feel violates the trust placed in them by Association members. Therefore, communications about events and other activities are limited to Association-sponsored and promoted events only. Any additions to this must be approved first by the CEO and/or the President, if deemed necessary by the CEO, before their inclusion in any membership-wide communications.

8.7 Association Publications

Any Association print or digital publication that contains paid advertising shall adhere to the policy *14 Association's Advertising/Sponsorship*. The Vice President of Communications shall have the responsibility for proofreading and editing all articles before publication. The CEO shall have the authority to accept or reject articles submitted for publication in the e-newsletter.

8.8 Prohibition of Recording of the Association's Board of Directors and Committee Meetings

1. Purpose:

   No recordings or broadcasting of Board of Directors meetings/committee meetings as defined below. This policy establishes guidelines for visitors and members attending Association Board of Directors' meetings, and/or committee meetings in person or virtually, ensuring transparency while respecting the rights of directors, committee members, and Association staff.

2. Definitions:
   a. Guest/Visitor: Any individual attending a non-profit board meeting who is not a member of the board or staff.
   b. Member: An official member of the group, such as a committee member, Officer, or Board of Director.
   c. Chair or President: Any person who is in charge of running the meeting or event as the leader, facilitator, or official.
   d. Association staff: Any RRAR employee or paid consultant.
   e. Recording: Any method of capturing audio, video, or visual content during the board meeting, including but not limited to artificial intelligence bots, photography, video recording, or audio recording.
   f. Broadcast: Any transfer of content from an Association meeting or event to another source that can be accessed by others. This includes posting on social media, blog, or other internet sites, or other technology, live or recorded, so that others can access or view.

3. Compliance with Applicable Laws:

   Visitors and members are responsible for complying with all relevant laws and regulations governing the recording/broadcasting of meetings, including but not limited to data protection laws and intellectual property rights.

4. Enforcement:
    a. Violation of this policy may result in expulsion from the meeting premises.
    b. The Association reserves the right to take legal action against individuals who violate this policy or engage in unauthorized recording/broadcasting activities.

5. Disclaimer:
    The Association assumes no liability for any unauthorized recording activities conducted by visitors, members, or Association staff. Visitors, members and/or Association staff who engage in recording activities at their own risk and are solely responsible for any consequences arising from such activities.

SECTION 9: MEMBERSHIP

9.1 Dues / Assessments / Fees

Where Designated REALTORS® have paid a non-member assessment for a salesperson, there is no refund when said salesperson joins the Board.

If dues are not paid by the specified due date, membership will be inactivated on the following business day. Membership may be reinstated at any time during the calendar year if a reactivation fee of $100.00 is paid along with the full annual dues amount.

There shall be a $150 transfer fee to those transferring as a member in good standing to RRAR from another association, or becoming a secondary member, with the exception of the Durham Regional Association of REALTORS® (DRAR) or the Triangle Commercial Association of REALTORS® (TCAR), as defined in section 9.2 Reciprocity Agreements.

9.2 Reciprocity Agreements

If an active member of DRAR or TCAR changes association affiliation to RRAR, the application fee will be waived, and no orientation will be required. A pro rata share of the local dues remitted to RRAR will be required to offset any costs involved for the remainder of the year for member services.

If an active member of RRAR changes association affiliation to the DRAR or TCAR, the application fee will be waived, and no orientation will be required.

A pro rata share of the local dues remitted to DRAR or TCAR will be required to offset any costs involved for the remainder of the year for member services.

9.3 Members' Access to Meetings & Materials

a. It is Association policy to welcome the attendance of members to the Board of Directors' meetings. Members may find the procedures and rules of decorum on the Association's website or by contacting the CEO. The Association reserves the right to protect the interests of its members and employees in maintaining confidentiality. All guests will be excused when the Board of Directors is called into Executive Session, at which time matters relating to confidential personnel matters, professional standards hearings, results and appeals, and attorney-client communications, among other possible matters, may be discussed.
b. Member guests who wish to virtually attend Board of Directors' meetings or any open committee meetings should request a link from the CEO a minimum of 48 hours prior to the meeting, and will be required to identify themselves for the purpose of roll call. No recording of meetings is allowed per Section 8.8 Prohibition of Recording of the Association's Board of Directors and Committee Meetings.
c. Minutes of the Board of Directors' Meetings shall be available to Association members for review upon request. Minutes of the Board of Directors' meetings are available to all members except those actions pertaining to Association staff. For that exception, review shall be authorized with the permission, and at a time scheduled by the Secretary-Treasurer or the President at the Association.
d. Refer to the committee list in Section 4.1 regarding open and closed committee meetings.
e. At the request of a member, the Association will make available for inspection all books and records of the corporation's accounts and all minutes of the proceedings of its members, Board of Directors, and committees. Such requests shall be fielded by the CEO and coordinated with the President. If requested, a copy of the most recent 990 filing will be provided. This statement of policy shall not constitute a waiver of the Association's right, at its discretion, to maintain as privileged any other documents in its files which it is not required by law to disclose. For any member examining the Association's books and records, the CEO may request that the member submit any questions they have in writing to the Board of Directors.

9.4 Life Members

The requirements of Life Membership as defined in the Association Bylaws shall be communicated to association members on an annual basis.

This required communication will be effective January 1, 2016. All current Life Members will be grandfathered along with all members who have qualified and applied for Life Membership by August 31, 2015.

Membership fees for this class of membership are one-half of the local association membership fees, as determined by the Board of Directors.

9.5 REALTOR® Emeritus

REALTOR® Emeritus status is granted by NAR to members who have had forty (40) years of continuous membership, and their national dues are waived. To apply and for more information, members should consult the NAR website.

RRAR Dues shall be waived for individuals who have been designated by NAR as REALTOR® Emeritus Members beginning with the dues cycle immediately following such designation if they meet the following criteria:

1. Proof of 1 year of service at RRAR
2. Must have been a member in good standing of RRAR for a minimum of 10 years
    a. "Service" is defined as serving as an RRAR officer, director, or committee member.

9.6 Past and Current Presidents of the Association

Past and current Association Presidents may attend up to two (2) regularly scheduled Association continuing education courses per year, subject to availability, at no cost. Past Presidents and one (1) guest of their choice may attend the Inaugural Gala and the Holiday Party with no registration fee.

9.7 Reapplication for Membership

Any person wishing to reapply for membership shall be subject to the NAR Dues Formula as addressed in the Association Bylaws.
Any person reapplying for membership also must take the New Member Orientation Course if it has been more than two (2) years since the last time taken. If New Member Orientation has been taken at a different association in North Carolina, it shall be recognized if taken within the last two (2) years.

9.8 Military Service

Upon request by a member or firm, local association dues will be waived for any member serving on “active duty” in any branch of the military. The CEO will make appropriate requests to NCR and NAR for respective dues waivers.

9.9 REALTOR® Affiliate Program (RAP)

a. RAP members are permitted to serve on Committees or Councils as defined in the individual committee or council makeups; however, they cannot be a Committee Chair or Vice Chair.
b. Are permitted to take classes at the same fee structure as REALTOR® members
c. Can be event sponsors and place advertising within the association at discounted rates according to policy guidelines.
d. No REALTOR® members may participate in RAP except:
    i. New Home Sales Associates who are permitted to promote only their new home subdivisions
    ii. Property Managers

e. Please refer to policy *14 Association's Advertising/Sponsorship* regarding RAP sponsorship guidelines.

SECTION 10: GOVERNMENT AFFAIRS

10.1 Candidate Interview Policy

The Board of Directors, Government Policy and Issues Committee (GPIC), Policy Rapid Response Committee, and RPAC Committee are expected to participate in candidate interviews. TRLA participants and GPIC regular attendees may be invited to attend as guest observers.

a. Any member who participates in the interview process must sign a disclosure statement to acknowledge any personal political involvement, opinions or agendas.
b. A session leader will be appointed for each interviewing session.
c. A prepared statement will be read by the session leader before any candidate enters the room. The statement shall reflect that the Association has zero tolerance for interviewers who pose personal questions or statements to candidates that are not pertinent to the real estate industry issues as defined by the GPIC and Board of Directors.
d. A GPIC regular attendee is defined as any Association member who attends at least half of all GPIC meetings in a calendar year prior to the start of candidate interviews for the election cycle.

10.2 Candidate Funding Policy

Financial support from the Association does not constitute an endorsement of a candidate. It indicates that the candidate being provided support has indicated their support of and commitment to policies that are important to consumers, the Association, and its members, and for private property rights.

In each race, REALTORS® PAC does not contribute to more than one candidate in a single election cycle, except that in a situation where the REALTORS® PAC-supported candidate loses his or her bid for that seat, a contribution may be made to another candidate in that race. In races where more than one seat is open for the positions available, REALTORS® PAC donations may be made for more than one candidate in the race up to the number of open positions. For example, if there are three seats open in the race for city council and five people are running, up to three may be funded in this race.

All decisions on candidate support will be finalized by the Board of Directors.

10.3 Fair Housing Policy

a. Fair Housing is the responsibility of all REALTOR® and other members of the Association.
b. NAR and RRAR oppose discrimination in housing based on race, color, religion, sex, handicap, familial status, sexual orientation, gender identity, and national origin. This policy is embodied in NAR's Code of Ethics. NAR also authorizes sanctions in response to a finding that a member has violated any fair housing law, including local and state laws that prohibit discrimination based on sexual orientation or gender identity. NAR policy is to support equal opportunity on the basis of sexual orientation and gender identity, and the NAR Code of Ethics was amended in 2010 and 2013 to include this updated policy in the Code of Ethics.
c. Members are encouraged to review the National Association of REALTORS® Fair Housing Declaration found on the NAR website.

SECTION 11: COUNCILS OF RRAR

Formation of Councils

Councils may be formed with the Board of Directors approval to serve the needs of the Association and its members. Every Council must have an assigned Association Staff Liaison who must be copied on all Council communiques (i.e. meeting notices, agendas, and minutes). Council Presidents, Presidents-elect, Chairs, Co-Chairs and Vice Chairs must attend the mandatory Leadership Orientation, held annually before the first Board of Directors' meeting of the calendar year.

Any council that collects, receives, holds, spends, or manages Association funds shall be subject to the financial oversight of the CEO and Board of Directors annually.
Unless otherwise authorized by the CEO and/or Board of Directors:

a. All revenues and expenditures shall be processed through the Association's accounting system and administered by Association staff.
b. Councils that establish independent bank accounts, investment accounts, payment applications, or other financial accounts must submit those documents to the CEO and/or Board of Directors within thirty (30) days.
c. Any council authorized to maintain separate financial records shall submit a financial report, including current account balances, income, expenses, and any outstanding obligations, to the CEO and Board of Directors no less than quarterly, and whenever requested by the CEO and/or Board of Directors to be delivered within ten (10) calendar days.
d. Meeting agendas, approved minutes, attendance records, and financial reports shall be maintained in accordance with the Association's records retention policies and provided to Association staff for official recordkeeping.
e. Councils may not commit Association funds or sign contracts without prior approval under the Association's legal and finance policies.

The Association must approve the Councils' new or amended:

a. Name
b. Mission/Vision Statement
c. Membership Criteria
d. Policies

The Association will provide the Councils:

a. Meeting space for monthly or quarterly meetings at Association facilities only, with the approval of the Association's Staff Liaison. Consideration of the Association's rental operations takes priority for non-regularly scheduled meetings. Such use of the Association's facilities by Councils outside of normal business hours stated on the Association's website must adhere to and acknowledge the 111 Place contract.
b. Funding, as budgeted during the initial start-up phase, is available upon request; however, it is not to exceed two (2) years.
c. Basic information about the Council, its criteria and upcoming meeting schedule as provided by the Council will be provided on the association's website subject to the right of the Association to remove content or refuse to post content that is deemed to be contrary to Association policy by the professional team of the Association.
d. Limited Association staff resources provided will be available solely for events at the Association. Resources may include:
    - Reserving meeting facilities at the Association
    - Council meeting notifications and RSVPs tally
    - Coordinating meal functions
    - Income/expenses and Statement of Activities, if processed through the Association accounts, provided upon request
    - Assisting with meeting setup
    - Assisting with agenda preparation and any copying needs
    - Event and speaker coordination assistance for events open to the general membership

The Councils' Responsibilities include:

a. With Association staff, create and maintain a policy manual to include at a minimum, financial policies with controls designed to safeguard assets, prevent fraud, and ensure regulatory compliance; sponsorship and membership criteria; statement of fees; and that parliamentary procedure will be followed for Council voting.
b. Meeting minutes must be created and reviewed by Association Staff Liaison, Council President, Chair, Co-Chair, President-elect and/or Vice Chair within ten (10) business days.
c. Reporting activities monthly to the Board of Directors on their monthly programs, speakers, topics, attendance, and future agendas on the form provided or one of their choosing. The Chair will assign this.
d. Collection of any/all fees beyond the collection of annual Council dues.
e. Reporting regularly and an end-of-year Statement of Activities on income and expenses to the Council membership.

f. Reading of the Statement of Anti-Trust Compliance at every meeting. The reading of the Fair Housing Statement to all members at their first annual meeting each year.
g. Providing Association staff at least two (2) months' notice of any events that will be made available to the general membership, including speakers, events, and national designation programs.
h. Any member-facing communication should be submitted to the Association communications staff for review prior to dissemination.
i. Not creating separate branding, websites, or social media accounts without CEO approval.
j. The ability to conduct designation courses; however, they may not hold continuing education classes in adherence with the Association's policy *12 Building & Rental Operations.*
k. Seeking their own sponsors, which must adhere to the Association's Policy *14: Association's Advertising/Sponsorship.*

SECTION 12: BUILDING & RENTAL OPERATIONS

The public side of 111 Realtors Way is available for rental by members and the general public. Members may receive a discount off the published fees, provided the intended use is in compliance with the facilities contract. The Association will maintain a current copy of the facilities contract and fee structure.

The Association and 111 Place do not permit seminars, presentations, programs, etc., that are of "recruitment" nature (programs that attempt to recruit agents, managers, and/or franchisees). The Association insists upon maintaining neutrality in such programs. Member companies and agents are invited to utilize facilities, provided they adhere to the non-recruitment policy for Association Events described in *15 Association Events*. Members or companies violating this policy may lose rental privileges at the discretion of the Executive Committee.

Any use of the facility may be subject to Executive Committee review to maintain the integrity of Association policies.

Any member or firm's use of the facility for programs or services in competition with the Association is not permitted.

SECTION 13: NAR & NCR

13.1 NAR Directors & NCR Directors

National Association of REALTORS® (NAR) Director

Directors will be allocated by NAR to each local association with at least 2,000 members as of July 31st the year before service pursuant to the following formula: the number of primary members in the local association as of July 31st of the year before service divided by the number of primary members in local associations with 2,000 or more members as of the same date multiplied by 425.

These NAR Directors will serve three (3) year staggered terms, with no term limits.

a. These Directors must meet any NAR requirements for this office and must actively seek to serve on NAR Committees or be involved in leadership roles at NAR or any of its Institutes, Societies, or Councils.

b. The Association Board of Directors will elect the NAR Directors. The Association's NAR Directors may also serve as Directors to NCR.

c. NAR Directors are required to attend the NAR REALTORS® Legislative Meetings, as well as NAR NXT in November.

North Carolina Association of REALTORS® (NCR) Director
The Association is entitled to one (1) NCR Director and additional NCR Directors based on the NCR allotment policy. The incoming President, with the consent of the incoming Executive Committee, will appoint the incoming NCR Directors. These Directors will be appointed to a one (1) year term and will consist of the current NAR Directors and current RRAR Directors. In the event an insufficient number of members fail to qualify, the incoming President, with the consent of the incoming Executive Committee, shall appoint the remaining NCR Directors from a pool of members who have served as RRAR Directors or NCR Directors within the past three (3) years.

a. All appointed NCR Directors, who are not currently RRAR Directors, are encouraged to attend the Association Board of Directors meetings.
b. Association Directors wishing to serve as an NCR Director must have served at least one (1) year on the RRAR Board of Directors before serving as an NCR Director.
c. Travel for NAR Directors and NCR Directors will be reimbursed per the *6.11 Travel Reimbursement* policy.

13.2 REALTOR® Director/Officer Candidate Approval Policy

Any REALTOR® seeking candidacy for a NAR or NCR office and requesting an audience with the RRAR Board of Directors shall be granted permission. Scheduling should be coordinated with the President.

Consideration of support, if any, shall be considered by the Board of Directors in an executive session.

Only the President and President-elect are authorized to communicate approved support to candidates on behalf of the Association and speak about the Association's policy positions.

After notification to the candidate, any support approved by the Board of Directors will be communicated to the Association membership.

13.3 REALTOR® Director/Officer Candidate Funding Policy

The Board of Directors reserves the right to approve funding for a supported candidate's campaign. Any requests for funding will be submitted to and reviewed by the Executive Committee and voted on by the Board of Directors.

13.4 National Association of REALTORS® (NAR) and NC REALTORS® (NCR) First-time Attendee Scholarship

The Association encourages its members to be actively involved in their industry and the three levels of the association. To support this, the association has created a scholarship fund to support RRAR first-time attendees to the NAR REALTORS® Legislative Meetings or the NC REALTORS® Convention. The Association may budget up to six (6) scholarships annually to cover registration, travel, lodging, and food (if applicable) in accordance with the Association's reimbursement policies. The Association may offer up to two (2) scholarships of $1,000 each for an Association member to attend the NAR Mid-Year Legislative Meetings and up to 4 scholarships of $750 each for an RRAR member to attend the NC REALTORS® Convention. Eligibility is limited to one scholarship per year.
CRITERIA: 1. Must have been a REALTOR® member of RRAR in good standing for the previous two (2) years at the time of application. 2. Scholarship recipients are required to complete any orientation/meeting(s) prior to the event with RRAR Leadership or a member of the RRAR Association staff. 3. To assist the recipient in making the most of their trip, a mentor will be assigned to each individual. In addition, a list of RRAR members and Association staff attending the conference will be available. 4. The following are the expectations and recommendations of the recipient: a. For the NAR REALTORS® Legislative Meetings in Washington D.C., attendees would be expected to participate in the NC REALTORS® and RRAR Hill Visit Meetings and encouraged to attend: • NAR Committee Meetings as a guest • Federal Priority Issues Briefing b. For the NC REALTORS® Convention, attendees would be expected to attend the General Membership Meeting and encouraged to participate in the following: • NC REALTORS® Legislative Forum • NC REALTORS® Region 10 Caucus Meeting • NC REALTORS® Committee Meetings as a guest • NC REALTORS® Treasurer's Forum 5. Recipients will be expected to share their experience with the RRAR Board of Directors.
SELECTION PROCESS: Applications for the NAR REALTORS® Legislative Meetings and the NC REALTORS® Convention must be received at least two (2) weeks prior to the opening of respective conference registrations. All applications will be reviewed and approved by the RRAR Executive Committee.

SECTION 14. ADVERTISING / SPONSORSHIP

Sponsorship is any form of advertising in connection with an Association event, program, publication or function by which an individual, firm or other legal entity is paying money or providing goods or services beyond a nominal value in exchange for name recognition.

Sponsorship does not include monetary or in-kind gifts to the Association, that are not provided with an expectation of name recognition for the purpose of advertising, as determined by the Executive Committee.

Sponsorship opportunities, including for Committees and Councils of the Association as defined above, shall be offered to any business, firm or organization wishing to sponsor except for:

a. REALTOR® members, new home agents, and new home marketing companies may sponsor association events to the extent that they are permitted only to promote their new home subdivisions, products or builders. There shall be no discussion of commission or bonus offers
b. Businesses in direct competition with Association events, programs, and functions (including RAP members)
c. Any business, organization or content that is determined in the sole discretion of Executive Committee to be contrary to the Association's mission/vision statements or the interests of RRAR membership as a whole
d. No advertisements soliciting agent recruitment or the offering of their real estate services to other members will be allowed

SECTION 15. ASSOCIATION EVENTS

This policy shall apply to all Association events sponsored by RRAR, whether at the Association offices or off-site.

The Association does not permit firms to recruit at Association events. The Association insists upon maintaining neutrality. Members are encouraged to participate in any Association events provided they adhere to this policy regarding recruiting. Members violating this policy may lose attendance privileges at the discretion of the Executive Committee.

SECTION 16. SOCIAL MEDIA CRISIS COMMUNICATIONS PLAN

This crisis communications plan defines the responsibilities and procedures for communicating with internal and external stakeholders in the event of a significant, unforeseen business disruption or threat to the company's reputation.

What's the definition of a crisis?

We're defining a crisis as any significant event that creates uncertainty and could have a long-lasting negative effect on our reputation and/or mission. It may dramatically impact our ability to operate if it isn't handled appropriately.

We've created a framework to further define these crises and ensure swift action and an appropriate response to match it and provided some examples alongside them. These examples may not always match the level listed here; for example, we may have a Level 3 crisis of executive misconduct. These examples are used simply to illustrate the gravity of the "level" and ensure that all parties understand the seriousness of the situation at hand.

Level	Description
1	This is the highest level of crisis escalation and involves an all-hands-on-deck approach. The situation is immediate and could potentially result in some sort of calamity, or another massive threat to the company. The problem may linger for years and require long-term intervention. Examples: Executive or member misconduct, data breaches or cyberattacks, social media hacker, or other sudden and unforeseen circumstances.
2	There is a significant potential risk or long-term impact to business operations, customer success, and/or the company reputation. Examples: Code of Ethics violation by a member or staff or any other situations that could seriously impact the public's perception of RRAR.
3	It doesn't yet pose a long-term or immediate risk to the business, but the team should still be on the same page for responding. This level is well-suited for an emerging crisis, or any situation that can potentially be anticipated or addressed early in its development to minimize the impact. Examples: Rumors, misinformation, personnel issues aired on social media, issues with company culture, member postings that are inappropriate and are detrimental to either the association, NCR or NAR.

4	This is where most “crises” will fall into. They are typically bigger versions of day-to-day issues that may need extra effort to be fully resolved and/or addressed. Examples: Negative Glassdoor reviews, negative tweets from a member.

The crisis communications team

The Point Person

The point person for any and all of these crises is our VP of Membership & Communications.

*If you believe the crisis has a potential to be a Level 1 or a Level 2 (or you are unsure), please contact him **directly** and **immediately**.*

The First Line

The following individuals make up our ‘first line of defense,’ and will also be informed once the company is aware of a crisis at Levels 1-3.

Name	Title	Email	Phone Number
Joanne Werstlein	VP of Membership & Communications	joannew@rrar.com	561-234-0077
Danielle Clermont	CEO	daniellec@rrar.com	954-559-1673
Cara Mottershead	VP of Operations	caram@rrar.com	919-272-2959
Frank DeRonja	Current President	Frank@drefirm.com	919-669-7993
Derrick Thornton	Current President-elect	dthorntonrealty@gmail.com	919-426-5683
Kevin Starkey	Current BOD Secretary/Treasurer	kevin@soldbystarkey.com	919-685-6266

The Greater Response Team

If specific (or all) departments need to be brought in as part of the crisis response and/or a larger response team is needed, these are the designated individuals and their contact information.

Name	Title	Email	Phone Number
Joanne Werstlein	VP of Membership & Communications		

Danielle Clermont	CEO		
Cara Mottershead	VP of Operations		
	Current President		
	Current President Elect		
	Current Secretary/Treasurer		
	Current Past President		

The Communications Team

In an unknown crisis, we have outlined a generic set of roles and responsibilities to help outline our communications to key stakeholders.

Task	Name & Title	Email
Crisis-specific key messages and updates		
Internal FAQs		
External FAQs		
Crisis response center set-up and management		
Spokesperson preparation		
Email, voicemail monitoring and response		
Social media response		
Spokesperson		
Media communications		
Board communications	President	
Employee communications	CEO	
Vendor communications	VP of Membership & Communications	

Community outreach	VP of Membership & Communications	

Procedure & process

During a crisis, we will follow these steps to fully craft our response statement and to align communications team. (These steps are adapted from a similar crisis response plan from the Association.

1. Determine a location for the crisis response center and begin setup. The crisis response center needs to include:
    i. Copies of the response plan, prepared statements, and crisis & communication team contact information
    ii. Computers and phones
    iii. Internet and phone/cell phone access with multiple phone lines available
    iv. Scanner and copier access
    v. Media and social media monitoring software
    vi. Media contact lists (print and digital versions)
    vii. Social media, monitoring sites and web login information
    viii. Emergency supplies
    ix. Anything else we might need to handle the crisis effectively
2. Convene the communications team to act on communications-related strategic objectives issued by the first line of response team.
3. Develop a specific communication plan relevant to the actual circumstances of the crisis. It will include:
    a. Identifying and prioritizing our audiences.
    b. Communication mechanisms for each audience (email, phone call, etc.).
    c. Responsibilities and timelines for each task.
4. Assign a team member to create a timeline of the actual events related to the crisis, and any and all responses given and actions taken.
5. Notify other department heads/the Greater Response Team to help manage the crisis.
6. Fill out the Crisis Factsheet (listed below) with as much information as you have available.
7. Craft key messages related to the actual circumstances (and refine/adapt them as needed).
8. Identify and prepare the spokesperson most appropriate for the situation.
9. Prepare possible response statements for telephone, email, text messages, website, social media and crisis site inquiries using key messages.
10. Make sure your crisis response center is set up accurately and with copies of the crisis communications response plan, the response statement and contact

information for all members of the crisis management team and communications team.

11. Assign responsibility to create and maintain phone and email logs of news organizations/reporters/bloggers/websites covering the crisis and any other key personnel, client, vendor partner, etc., who may be inquiring about the situation.
12. Notify staff.
    a. Use available communication vehicles (phone, email, Zoon, etc.) to call staff to action as needed.
    b. Hold a short briefing meeting onsite, or at a predetermined offsite location or via conference call, to reassure staff members and prepare them for crisis management.
    c. Remind staff of existing media (social and traditional) policies.
    d. Set predetermined times for staff members to reconvene to receive regular updates and guidance.
    e. Provide staff with key messages to communicate to members, constituents, and vendors as appropriate.
13. Begin contacting those affected by the crisis. Identify best mechanisms to reach each person, including phone, face-to-face meetings, conference calls, email, media briefings, press releases, instant alerts, etc. Make specific assignments and include them on the timeline.
14. If crisis warrants, develop an additional web page on the RRAR website to include press releases, photos, etc. Update all as needed.
15. Set regular times for communicating updates as needed.
16. Contact local emergency officials and government officials as necessary.
17. Make sure those affected by the crisis are being kept informed through regular phone updates, email updates , text messages, etc.
18. Keep your timeline updated, documenting all actions taken and team members responsible and make accessible to all crisis management team members to review.
19. Keep clear records of all the crisis content from social media in the Communications folder called Social Media Crisis Records.

Crisis Factsheet

Event name	
Crisis level	
Communication goal	

DETAILS:

What happened?	
When did it happen?	
Who is involved?	
Who is affected?	
How did it happen?	
Do we have credible sources of information?	
What additional facts are needed to put the event into perspective?	
What is currently being done?	

Information that has been confirmed	***Source, date, & time***

Information that is still unknown	*Primary contact*

Messaging templates

The following templates will be used by the communications team in the event of a crisis we have not prepared for. Only include definitive facts and not speculative details; verify *everything* you say. Make sure that the statement is authentic and appropriate for the situation at hand.

The holding statement should always include:

- A factual headline
- The date and time
- The location of the incident (what social platform)
- Basic details that have been confirmed
- When the RRAR was made aware of the issue
- Actions your organization is taking that you are willing to make public
- An expression of compassion or empathy (if appropriate)
- Contact details OR details on when further updates may occur

It should never include:

- Details that are unconfirmed or uncertain
- Any kind of speculation

- A response to unsubstantiated rumors
- Statements of blame or finger-pointing
- Names of victims in the case of death

HOLDING STATEMENT - GENERIC

We have recently been informed that a [what happened] on[location] involving [who] occurred today at [time]. The incident is under investigation and more information is forthcoming.

HOLDING STATEMENT - OFFENSIVE STATEMENT OR ACTION BY EMPLOYEE ON SOCIAL MEDIA

Accusation only:
We are saddened by the recent allegations surrounding the [incident/accusation] with/against [employee]. [Company] is committed to being a safe and inclusive workplace for all. We're still assessing the situation and these accusations. We want to understand what happened, and our next step will be to work with our [people operations/human resources/executive/legal] team(s) to determine the best course of action. In the meantime, we would like to offer our sincerest apologies to all of those affected or upset by these accusations.

Confirmed evidence:
The viewpoints expressed by this employee do not represent Raleigh Regional Association of REALTORS® values at all, and we empathize with those hurt, upset, and disturbed by the employee's [words/actions]. We emphatically denounce what [employee] has [said/done], and as a result, have made the decision that we can no longer [represent/employ/collaborate/partner with] [employee]. We are determined to provide a safe and inclusive work environment at RRAR and are working with our [people operations/human resources/executive/legal] team(s) to determine the best course of action. Again, we wholeheartedly apologize to [person/people] affected.

HOLDING STATEMENT - LAWSUIT

We cannot comment on ongoing litigation, but Raleigh Regional Association of REALTORS® is committed to [statement that does not divulge information or opinion about lawsuit].

Key messages

TARGET AUDIENCE	MESSAGE

Customers	
Employees	
General public/community	
Media	
Board	

FAQs

Consistent messaging is needed for all of these questions when responding to a crisis. Though we should anticipate and address specific questions as part of our crisis response planning, this provides a place to start.

Target audience	FAQs
Member	● How is this problem going to be resolved? ● How does this affect me?

	● What are you going to do to prevent this from happening again?
Employees	● What is my response if I am asked what happened? ● Who do I contact if the press wants to speak to someone about the issue? ● What are we going to do to prevent this from happening again?
Management/leadership	● What happened? ● When did it happen? ● What should I do next? ● What's the estimated impact to the business? ● What are we going to do to prevent this from happening again?
News/media	● What happened? ● When did it happen? ● What caused it? ● Who is responsible? ● What's the estimated impact?

Crisis debrief

Approximately one to two weeks after the crisis event is substantially or completely handled, run a full debrief of the event with the communications team and the Executive Team. Evaluate both the short- and long-term impact of the crisis, and how they will be addressed.

What did we do well?	
What did we not do well?	
What are our key learnings for next time?	

What are the short-term impacts?	
What are the long-term impacts?	
What are our next steps to address all of the above?	

SECTION 17. Disaster Response Plan

Priority:
First and foremost, the safety of people is of utmost importance. It is essential in the event of a threatening situation (fire, storm, accident, etc.), whether at 111 Place or off-site.
The response in any situation should include:

1. Alert people of the danger and direct them to safety.
2. Call 911 for emergency help (if needed).
3. Immediately contact the CEO or Vice President of Operations, as detailed in the Calling Tree in this document. If neither of the previous has been spoken to, continue through the chain of command, leaving voicemail messages at each number and moving to the next contact until one-on-one communication is made.
4. The CEO will initiate the Calling Tree process by contacting the President, President-elect, Immediate Past President, and Secretary-Treasurer.
5. The CEO or his/her designee will provide appropriate notifications and communications within the organization and to any stakeholders.

DISASTER RESPONSE SITUATIONS FOR ASSOCIATION HEADQUARTERS
1. FIRES

1. CALL 911 for help.
2. Sound the alarm, make a broadcast announcement, and evacuate all people from the building or site.
3. Follow the established communication protocols in the Calling Tree. The Association evacuation process should be followed.

2. STORMS

1. Association staff should take steps to protect themselves, members, and consumers during and immediately following the storm. The RRAR evacuation process should be followed.
2. In the event of threatening weather, move all people to safety, paying special attention to protecting people from potential threats such as lightning and high winds.

ASSOCIATION HEADQUARTERS - PROCEDURES WHILE OCCUPIED

1. When the Disaster Response Plan is enacted, the Association staff must immediately broadcast a message to warn all persons and attempt to guide all occupants in the facility in accordance with the evacuation plan.
2. To note, the Association Headquarters is equipped with three emergency panic buttons: within the RRAR store, the front desk, and the membership department. Once activated, the police are dispatched immediately to Association Headquarters.
3. Staff should take flashlights, cell phones, and first aid kits with them to the designated shelter-in-place location (Room 119), if possible.
4. Notify the CEO & Vice President of Operations about the evacuation location and the number of persons in the shelter.
5. Call 911 to report emergency needs in the shelter or following the storm.
6. If the event happens during the evening or weekends, notify the CEO and continue through the Calling Tree until someone is notified.
7. The Vice President of Operations will initiate documentation of the damage to the Association headquarters for insurance claims.

ASSOCIATION HEADQUARTERS – PROCEDURES WHILE VACANT

1. The Vice President of Operations will monitor for storms/damage to the Association headquarters and notify the CEO of any damage.
2. The Vice President of Operations will initiate documentation of any damages to the Association headquarters for insurance claims.

INFORMATION SYSTEMS

1. Any technology-based equipment damage should immediately be reported to the IT Director, who will coordinate and expedite recovery of those systems with the vendor.
2. All computer data and configurations are backed up at a remote off-site storage to provide systems redundancy if the building and/or on-site computer systems are destroyed.

EMERGENCY CALLING TREE (for internal use only)

The VP of Membership & Communications is responsible for updating the Calling Tree.

Association Staff and Executive Committee Contact List

a. CEO
b. President
c. President-elect
d. Secretary-Treasurer
e. Immediate Past President
f. Vice President of Operations

The Vice President of each department will be responsible for each of their direct reports and will then call the CEO when all employees have been successfully contacted.

Staff and Board Executive Responsibilities
In the event of a disaster, the CEO will alert the President, who will alert the Executive Committee and Board of Directors as deemed necessary. The CEO shall remain focused on the disaster situation at hand, and notify other Association staff, as needed. After initial phone alerts, status updates will be sent via email when possible. After the immediate danger has subsided, an email will be sent providing a summary of the situation and resolution details to the Association staff and Board of Directors.

SECTION 18. Investment Policy

Raleigh Regional Association of REALTORS®
Investment Policy Statement
August 2024

- **Scope and purpose**

  This statement of investment policy and spending guidelines is set forth by the Board of Directors of the Raleigh Regional Association of REALTORS® (the "Organization" "Association") in order to:

  1. Define and assign the responsibilities of all involved parties.
  2. Establish a clear understanding for all involved parties of the investment goals and objectives of the assets (the "Fund" or "Portfolio") of the Organization.
  3. Offer guidance and limitations to all Investment Managers regarding the investment of Fund assets.
  4. Establish a basis for evaluating investment results.
  5. Manage assets according to the prudent person standards as established in common trust law.
  6. Establish the relevant investment horizon(s) for management of the Fund assets.
  7. Establish clear spending guidelines.

  In general, the purpose of this statement is to outline a philosophy and attitude that will guide the investment management of the assets toward the desired results. It is designed to be sufficiently specific to be meaningful, yet flexible enough to be practical.

- **Governance: Role of the Board of Directors, the Finance Committee, and the Investment Manager**

  Role of the Finance Committee

  The Board of Directors has delegated the responsibility for the operations and investment activities of the assets to the Finance Committee (the "Committee") of the Association. This Committee carries out the mandates of the Board by establishing investment objectives and policies, and monitoring the implementation and the performance of the investments, including the following duties:

  1. Create an Investment Policy Statement that sets forth appropriate risk and return objectives, including asset allocation guidelines. Review the IPS on at least an annual basis for possible updates. Attain signature approval and acceptance by the CEO and the Investment Manager on an annual basis.

  2. Projecting the Fund's financial needs and communicating such needs to the Investment Manager(s) on a timely basis.

  3. Determining the risk tolerance and time horizons for each of the various investment funds and communicating these to the appropriate parties.

  4. Establishing reasonable and consistent investment objectives, policies and guidelines that will direct the investment of the Fund's assets.

  5. Prudently and diligently selecting and monitoring qualified investment professionals, including Investment Manager(s), Investment Consultant(s), and Custodian(s).

  6. Semiannual evaluation of the performance and risk metrics of the Fund investments to assure adherence to policy guidelines, costs of investment management and monitor investment objective progress.

  7. Developing and enacting proper controls procedures: For example, replacing Investment Manager(s) due to poor performance, cost, malfeasance, failure to communicate with the Board or its representative, failure to conform to written policies, and any other act(s) with which the Board may find cause.

  8. Consider investment strategy change recommendations made by the Investment Manager and vote to approve or disapprove.

  9. Report to the Board of Directors on a regular basis.

  Role of the Investment Manager

The Investment Manager will be responsible for advising the Finance Committee regarding:

1. Investment Policy and Strategy

2. Asset allocation recommendations

3. Performance evaluation of securities, including comparison with appropriate benchmarks and peer groups. Provide risk metrics. Review market and economic outlook.

4. Use authorized discretion to implement security selection and timing within the stated Investment Policy Statement.

5. Rebalance accounts as needed to stay within the agreed-upon tolerance range of the current asset allocation strategy.

6. Host comprehensive investment review meetings with the Committee on a semiannual basis, with additional meetings on an as-needed basis.

7. Provide quarterly reporting of performance evaluation and risk metrics.

8. The Finance Committee requests that the Investment Manager report when the value of the assets, net of contributions and distributions, falls 20% below the initial market value.

● Investment, Return, and Risk Objectives

Target Rate of Return

The Portfolio should provide sufficient income to meet current and future distribution needs, with the primary Investment Objective for the Portfolio's assets being to maintain purchasing power and to seek a total rate of return exceeding the Consumer Price Index (CPI) by five percent (5%) over a rolling five-year time horizon. The overall goal is for the Portfolio to earn the highest return possible without exposing the Portfolio to undue risk.

Underlying Accounts

The investment assets of the Association may be divided into underlying accounts that may have differing investment objectives. The overall investment policy of the Association's assets will take into account the individual objectives of these underlying accounts.

Portfolio Composition and Asset Allocation

The Association's Fund will invest in a broadly diversified portfolio with assets

allocated in a manner that will provide investment returns in line with the performance objective. The Investment Manager will be given authority to invest the portfolio within allowable asset class ranges at its discretion. The Investment Manager will keep the Finance Committee apprised of changes in asset class and sub asset class changes.

To achieve its long-term goal, the Association has adopted a strategic asset allocation plan that envisions a reasonably stable distribution of assets among major asset classes and has adopted the following asset allocation objectives (all figures represent a percentage of total assets):

Asset Class	Strategic Asset Allocation %	Allowable Range
Equities	55 %	40%-70%
Fixed Income	35 %	25%-50%
Real Assets	5%	0%-10%
Alternative Assets	3%	0%-10%
Cash & Equivalents	2%	2%-15%

Prohibited Assets:

Prohibited investments include, but are not limited to the following:

Futures Contracts
Assets that may produce UBTI
Private Placements with limited liquidity
Cryptocurrency

Prohibited Transactions

Prohibited transactions include, but are not limited to the following:

Short Selling
Margin Transactions

- ## Liquidity and distribution requirements

A certain amount of cash equivalents will be held in order to provide for tactical investment decisions, rebalancing, accrued income, and for disbursements as directed by the Finance Committee for operational or other needs of the Association. Should expenditures be anticipated on a regular or ad hoc basis, sufficient liquidity should be maintained to provide for such needs.

To minimize the possibility of a loss occasioned by the sale of a security forced by the need to meet a required payment, the Association will periodically provide the Investment Manager with an estimate of expected net cash flow. The Association will notify the Investment Manager in a timely manner, to allow

sufficient time to build up necessary liquid reserves.

- ## Legal, tax, and regulatory constraints

Assets that may produce unrelated business taxable income (UBTI) are to be avoided unless the Investment Manager recommends such investments and obtains the approval of the Committee to utilize them.

The Association is a non-profit corporation controlled by its Board of Directors and CEO.

Transactions between the Association and certain insiders, known as disqualified persons, are prohibited.

- ## Miscellaneous items

Financial Reserve Policy (as amended August 2024)

General Operating Reserve Fund

The **General Operating Reserve Fund** of the Association is to be an amount not less than twenty-five percent (25%) and not to exceed seventy-five percent (75%) of the Association's annual Operating Expenses, averaged using the previous two (2) years of annual operational expenses. Funds in excess of the established General Operating Reserves and other dedicated reserves will be expended at the recommendation of the Committee and by approval of the Board of Directors for the reduction of long-term debt, to offset an unapproved deficit budget, or for the betterment of the Association and its members through providing for the operations and initiatives of the Association.

In addition to the General Operating Reserve Fund, the following reserve funds may be funded exceeding the requirements outlined in section A above, as recommended by the Committee and approved by the Board of Directors:

Capital Assets Fund

Not to exceed $500,000.00 – these reserves will be expended for the acquisition of capital assets or asset improvements. They will be expended at the recommendation of the Committee and by approval of the Board of Directors.

Legal Action Fund

Not to exceed $100,000.00 – these reserves will be expended to defray the costs associated with legal action involving the Association or one of the Association's members in matters of legal precedence related to private property rights and/or the practice of real estate. This fund will be administered by the Legal Action Committee in accordance with the policies in Section 5.5 of this Manual.

Ray Larcher Opportunity Fund

Not to exceed $50,000.00 – these reserves will be expended in order to allow the Association to capitalize on opportunities presented to it. They will be expended by approval of the Executive Committee.

All reserves of the association will be invested by a professional money manager approved by the Board and in accordance with the approved investment policies. The Committee will be responsible for monitoring the performance of the invested reserves at a minimum of a semi-annual frequency and recommending changes to the investment policy.

Note: General Operating Reserves shall be calculated as of December 31st as: Total Cash and investments – (Total Current Liabilities - Prepaid Dues)

Operating Expenses shall be calculated for the period ending December 31st based on the unaudited financial report.

Approved by the CEO:

By: _____

Date: _____

Agreed to by the Investment Manager:

By: _____

Date:_____

SECTION 19. Photography, Video & Media Release Policy

RALEIGH REGIONAL ASSOCIATION OF REALTORS® (RRAR)
Photography, Video & Media Release Policy

The Raleigh Regional Association of REALTORS® (RRAR) regularly photographs, records, and captures video and audio at association-sponsored classes, meetings, conferences, networking events, volunteer activities, and other programs.

By registering for and/or attending any RRAR event, class, meeting, or program, attendees acknowledge and agree that they may be photographed, filmed, or recorded. Attendance constitutes the attendee's consent to RRAR's use of any photographs, video recordings, audio recordings, livestreams, screenshots, or other media containing their likeness, image, voice, name, or statements.

RRAR may use such media, without compensation or additional approval, for lawful association purposes including, but not limited to:

- Marketing and promotional materials
- Social media platforms
- RRAR websites and digital communications
- Email marketing campaigns
- Educational materials and presentations
- Annual reports and publications
- News releases and media coverage
- Historical and archival records

Attendees waive any right to inspect or approve the finished product, publication, or use of such media and release RRAR, its officers, directors, employees, contractors, and agents from any claims arising from the use of these materials.

RRAR reserves the right to photograph and record all association events unless otherwise noted. Individuals who do not wish to appear in photographs or recordings should notify RRAR staff at least 24 hours by email prior to the event. While RRAR will make reasonable efforts to honor such requests, it cannot guarantee exclusion from all event photography, video, or group images. Anyone who opts out of photographs and recording will be given a red colored lanyard, sticker or nametag to avoid unintended images being produced.

This policy applies to all RRAR-sponsored events and programs, whether conducted in person, virtually, or in a hybrid format.

Registration Language (Recommended for Jotform, Tangilla, etc.)

I understand that by registering for and attending this RRAR event, I may be photographed, video recorded, or audio recorded. I grant RRAR permission to use my likeness, image, voice, and statements in association publications, marketing materials, social media, websites, and other promotional or educational content without compensation or additional approval.