Policies and Procedures Manual

Approved and adopted by the COCBR® Board of Directors on October 26, 2023

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Central Oregon Coast Board of REALTORS®
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ARTICLE 1: GENERAL

Section 1.1 - Policy Purpose and Formulation

Policy statements establish guidelines and standards for internal Association operations. All policies shall become effective upon adoption and approval by the Board of Directors each year. Approved policy statements from one year shall remain in effect until the Board of Directors adopts the policy statements for the following year.

Section 1.2 - Mission Statement

The mission of the Central Oregon Coast Board of REALTORS®. (COCBR®) is to provide services to ensure our members' success and promote REALTOR® values.

Section 1.3 - Logo

Use of the COCBR logo shall be permissible to members in good standing provided that it accompanies the member's company logo and shall not be larger in size than the member's company logo. The CCBOR logo may not be used in a way to make the appearance that the member is a designated spokesperson or representative for COCBR, unless approved prior in writing by the Board of Directors**.**

Section 1.4 - Commitment to Free Trade and Competition

The Central Oregon Coast Board of REALTORS® does not and will not establish or maintain fixed or recommended commission rates, listing terms or services provided to principals. Commissions, listing terms and services are a matter of negotiation between the principal and the principal's agent. The Central Oregon Coast Board of REALTORS® will not interfere in such negotiations or inhibit or restrict in any way the freedom of members to negotiate their own business agreements. In order to avoid even the appearance of anti-competitive behavior or purpose, participants in all meetings called or sponsored by the Central Oregon Coast Board of REALTORS® will discuss only the legitimate business purposes of the Association as prescribed by in the meeting agenda and recorded in the minutes of the meeting.

The chairperson of any meeting called or sponsored by the Central Oregon Coast Board of REALTORS® shall not allow discussion of commission rates, listing terms, other subjects that might be viewed as anticompetitive and will remind those in attendance of the Association's commitment to free trade and competition. If anyone attends a meeting or called or sponsored by the Central Oregon Coast Board of REALTORS® persists with discussions that could give the appearance of anti-competitive behavior or purpose, the meeting shall be adjourned. The minutes of the meeting shall reflect the reason for adjournment, and the incident shall be reported immediately to the Legal Affairs Department at the Oregon Association of REALTORS®.

Section 1.5 - Referrals and Recommendations

Central Oregon Coast Board of REALTORS® does not respond to requests from the public, written or verbal, for references or recommendations of individual REALTOR® members. COCBR can recommend Affiliate members.

Section 1.6 - Access to Legal Counsel

OR® legal counsel staff will be available to discuss governance issues and other issues impacting or regarding the Central Oregon Coast Board of REALTORS®. Legal counsel will not be generally available to discuss or give legal advice regarding personal business or private legal matters, unless the matter comes properly through the Legal Hotline, administered and staffed by the Legal Affairs staff.

Section 1.7 - Authorized Spokesperson / Public Relations

A. The President, or Vice President in the President's absence, shall be the only authorized spokesperson for COCBR®. No other individual shall speak for the Central Oregon Coast Board of REALTORS® on matters affecting the Central Oregon Coast Board of REALTORS® or its membership.

B. Any public statements, correspondence, and/or written solicitations outside of set policy must be approved by the President and delivery of such is reserved for the President or his/her delegate.

Section 1.8 - Charitable Requests

The Central Oregon Coast Board of REALTORS® recognizes there are many worthwhile activities and organizations serving the needs of our community. The Central Oregon Coast Board of REALTORS® encourages charitable giving and participation by its individual members.

Section 1.9 - Solicitation

All solicitations for funds, project financing or endorsements will be submitted to the Board of Directors for approval, prior to funding, financing or implementation of the endorsement. Donation requests from religious, educational, philanthropic or civic organizations will be treated as a solicitation.

ARTICLE 2: CONDUCT POLICIES

Section 2.1 Code of Conduct

A. COCBR maintains a Code of Conduct for Officers, Directors, committee members, and Staff. The purpose of this Code is to protect the interests of the Central Oregon Coast Board of REALTORS® and/or its subsidiaries (collectively, the "Organization") from harmful conduct by an Officer, Director, committee member, or Staff. This Code is intended to supplement, but not replace, any applicable state or federal law applicable to non-profit and tax-exempt organizations.

B. The Board of Directors and all Committee Members annually sign confirmation that they have read and will comply with the Code. The COCBR Code of Conduct is attached as Addendum A.

Section 2.2 - Conflicts of Interest

A. No member of the Central Oregon Coast Board of REALTORS® Board of Directors, Executive Officer, or any member of any Committee shall engage in discussion of any

B. matter involving a conflict-of-interest transaction without first disclosing the conflict and obtaining the approval of the majority of the body present.

C. In no event shall the member cast a vote in any matter involving a conflict-of-interest transaction. A conflict-of-interest transaction in any proposed business transaction with the Board in which:
   a. As a result of the transaction with the Board, a member will or could gain or lose personal financial benefit.
   b. Or the member has voting rights in a business organization directly or indirectly affected by the transaction.

D. See attached Association's Code of Conduct Statement which addresses conflict of interest and confidentiality requirements in Addendum A. The statement is to be signed annually upon acceptance of their position.

Section 2.3 – Anti-Trust Policy

To assure that the Association complies with antitrust laws, all Board members will be required to sign the Associations Antitrust Statement included in Addendum A. The statement is to be signed annually upon acceptance of their position.

Section 2.4 - Confidentiality

A. Officers, Directors, and committee members shall be aware of the confidential nature of proprietary information concerning the affairs of the Association ("Confidential Information"), and shall agree that the Confidential Information: (a) will be kept confidential, (b) will be used only for purposes of performing duties to the Organization, and (c) without limiting the foregoing, will not be disclosed by such person, except as required to perform such duties or with the prior written consent of the Association.

B. All the foregoing obligations and restrictions do not apply to that part of the Confidential Information that becomes generally available to the public. It is understood that a person shall not be prevented hereby from complying with any applicable public disclosure requirements imposed by law or
regulation: provided that any person who believes such disclosure is necessary to comply with such laws or regulations shall first notify the Association in advance of any disclosure of Confidential Information and such a person shall cooperate with the Association's reasonable efforts to obtain a protective order or other similar protection of Confidential Information.

Section 2.5 - Whistle Blower

A. COCBR is responsible for the stewardship of member and employee contributions and resources. In fulfilling that responsibility, the Association is committed to compliance with all laws and regulations to which it is subject. In addition to complying with the law, the Association is committed to the ethical and fair treatment of its volunteers and employees. This Policy provides an avenue for volunteers or employees, without concern that they will be subject to retaliation or reprisal, to raise concerns regarding financial wrongdoing which may include, but is not limited to:
    a. Questionable accounting practices.
    b. Fraud or deliberate errors in financial statements or record keeping.
    c. Deficiencies in accounting controls.
    d. Misrepresentations to the BOD regarding the financial condition of the Association; and
    e. Intentional or unintentional violations of laws or regulations.

B. If any volunteer or employee reports, in good faith, what the volunteer or employee believes or knows to be a violation of the law and/or financial wrongdoing to the Association, it is the Association's policy that there will be no retaliation taken against the volunteer or employee. Any volunteer or employee will be subject to discipline up to, and including, dismissal from the volunteer position or termination of employment if they, against this policy, retaliate against someone who has in good faith reported their concern. In turn, allegations made in bad faith, if proven to be unsubstantiated and made maliciously, recklessly or with the knowledge that the allegations were false, will be viewed as a serious offense and may result in discipline, up to and including dismissal from the volunteer position or termination of employment.

C. Any report of a known or suspected violation of the law and/or financial wrongdoing should be reported to the Executive Officer and/or the President for investigation and appropriate action. In the event the charge is against the Executive Officer, the report of a known or suspected violation of the law and/or financial wrongdoing should be reported to the President or Immediate Past President for appropriate action. To the extent possible, reports made under this policy will be kept confidential consistent with the need to conduct an adequate investigation. The whistle blowing procedure is intended to be used for serious issues and, as such, volunteers and employees are reminded of the importance of keeping financial matters confidential.

Section 2.6 - Non-Discrimination Policy

The Central Oregon Coast Board of REALTORS® believes that every member and employee has the right to work in surroundings that are free from all forms of unlawful discrimination. It is the Central Oregon Coast Board of REALTORS® policy that employees be treated fairly at all times, without regard to race, religion, color, sex, handicap, familial status, national origin, orientation, gender identity, or age (if the employee is 18 year or older) or of any person with whom the employee associates, or any expunged juvenile criminal record or physical or mental handicap of the employee, or because the Central Oregon Coast Board of REALTORS® employs a family member of the employee, or on any other basis prohibited by local, state or federal law.

Section 2.7 - Harassment Policy

A. The Central Oregon Coast Board of REALTORS® has a strict policy prohibiting all forms of harassment. The policy applies to all employees and members in connection with any Central Oregon Coast Board of REALTORS® function or activity. No employee or member shall be a party to any plan by others to unlawfully discriminate.

B. No employee or member shall engage in any conduct constituting harassment. No employee or member against whom a charge of harassment has been made shall in any manner seek reprisal against the employee or member making the charge.

C. Harassment can be based on national origin, age, sex, race, color, religion, ability, familial status, religion, sexual orientation, gender identity, or gender expression. It may also encompass others
forms of unwelcome, hostile, intimidating, threatening, humiliating, or violent behavior that is not necessarily illegal, but still prohibited by this policy.

D. An employee or member who observes an act of harassment shall report the act to the Executive Officer or a member of the Central Oregon Coast Board of REALTORS® Board of Directors.

E. **Definition:** “Harassment” is defined for purposes of this policy as any unwelcome advance, request for favors or other verbal or physical conduct. It includes, but is not limited to:
   a. Offensive or disrespectful comments, slurs, innuendoes, teasing, and other sexual talk or personal inquiries.
   b. persistent unwanted courting and derogatory insults.
   c. Jokes or suggestions about the race, religion, color, sex, pregnancy, childbirth, national origin, ancestry, marital status, or age-related physical attributes of another.
   d. Sexually suggestive jokes, profanity or euphemisms,
   e. Nonverbal harassment, including but not limited to suggestive or insulting sounds, obscene gestures, leering or whistling.

f. Unwanted physical contact, such as touching, impeding or blocking movement, or any physical interference with work.
g. The display of explicit or suggestive pictures, drawings or written materials, or
h. A social invitation accompanied by a discussion of performance reviews, evaluation or merit considerations,
i. Stalking.

F. **Enforcement**: All charges that a Central Oregon Coast Board of REALTORS® employee or member has harassed or discriminated against a member, or another employee shall be referred to the Executive Officer or President for investigation and appropriate action in accordance with the Central Oregon Coast Board of REALTORS® personnel policies. All charges a member or the Executive Officer have been harassed or discriminated another Officer or member of the Central Oregon Coast Board of REALTORS® shall be referred to the Board of Directors for appropriate action, which may include, without limitation, counseling, oral or written reprimand, or expulsion from the Association.

Section 2.8 - Alcohol Policy

The Central Oregon Coast Board of REALTORS® shall not pay for alcoholic beverages served at any Board sponsored event.

ARTICLE 3: OPERATIONAL POLICIES

Section 3.1 - Contracts and Encumbrances

The President and/or the Executive Officer, on advice of legal counsel, and only with the approval of the Board of Directors, shall be the only individual(s) authorized to enter into contracts or agreements which incur financial or other liabilities to the Central Oregon Coast Board of REALTORS®. Rev. 8/20/25

Section 3.2 - Employer/Employee Guidelines

The Central Oregon Coast Board of REALTORS® adopts the National Association of REALTORS® Employer/Employee Guidelines, as amended by the National Association of REALTORS® from time to time as an attachment.

Section 3.3 - Office Management

The Board of Directors is responsible for employing an Executive Officer. The Executive Officer shall report to the President, and is empowered, within budgetary limitations, to manage the regular and daily functions of the COCBR office. An annual performance review of the Executive Officer shall be ratified by the Board of Directors in December of each calendar year.

Section 3.4 - Annual Checklist

At the first BOD meeting of each Board year, the following tasks will be completed or as necessary, set a schedule for completion:

A. Board Members shall sign the Oath of Office, Code of Conduct Statement and Association's Antitrust Statement included in Addendum A.

B. The Board shall review and adjust as needed the budget for the current year. Rev. 8/20/25

C. The Board shall affirm existing bank accounts and/or approve any new and necessary bank accounts; affirm existing designated reserve funds; and approve increases or reductions to the designated reserve funds.

D. Identify all necessary Standing Committee and Task Force Chairpersons and potential participants. Chairpersons will be responsible for recruiting additional members and directing Committee or Task Force Activities.

E. Review the current governing documents (Strategic Plan, Annual Calendar, Committees, Core Standards, etc.) and reaffirm or schedule when revised documents are to be completed.

F. Review authorized account signers and credit card holders. A vote will be required to be documented in the meeting minutes to approve all signers for the year. Provide financial institutions with a copy of the meeting minutes authorizing signers within ten (10) business days following the meeting and arrange for new signatures cards to be signed for the bank accounts.

Section 3.5 – Member Communications

The official E-Newsletter of COCBR shall be issued monthly.
http://www.cocbrflo.com shall be the Association website. The Executive Officer will be responsible for maintaining the website unless the maintenance is outsourced. Informational items and classes and event notices shall be communicated to the membership via emails and the E-Newsletter which shall also be published on the website. Mailchimp will also be used to communicate events, classes and Calls to Actions. Rev. 8/20/25

Section 3.6 – Member Rights and Privileges

A. Only REALTOR® Members may serve on the Board of Directors, except that one Director position may be filled by an Affiliate or the Treasurer position may be filled by an affiliate.

B. REALTOR® Members, Affiliate Members and Institute Affiliate Members are entitled to vote. Public Service Members, Honorary Members and Student Members do not have voting privileges.

C. Public Service Members, Honorary Members and Student Members will be given membership by board approval only. These types of Membership will have the right to attend General Membership Meetings, Board activities and are welcome to address the Board of Directors during the designated time at the beginning of meeting. However, will be excused and only those members who are bound by fiduciary duty to the Association may stay for the remainder of the meeting. Membership must be reviewed and approved by the Board annually.

D. Public Service, Honorary and Student Members will be given with no attached fee requirements.

Section 3.7 - Computer System Backup Procedures

A. The RMLS IT Department is responsible for tech support for the equipment (shared RMLS computer printer), security software and equipment updates, as necessary.

B. The COCBR Executive Officer is responsible for maintaining all Board related documents on Google Drive.

Section 3.8 – Member Privacy

COCBR recognizes the importance of protecting the personal information members provide. Therefore,
COCBR maintains the following Privacy Policy for mailing lists, websites controlled and/or owned by
COCBR, email distribution lists, and all other forms of advertising or communications utilizing membership records and information.

A. COCBR may gather the following types of information needed to process transactions, fulfill requests, and maintain membership records:
   a. Contact information provided by the member (for example - personal and business mailing addresses, phone numbers, email address, firm affiliation and title).
   b. Tracking information which is automatically recognized by the web server each time a COCBR site is visited, or the member has communicated with COCBR via email (for example - domain name, email address, and pages visited); and
   c. Information volunteered via applications or surveys (for example - education, designations, specialties, affiliations with other real estate organizations and general demographic data).

B. This information is used too:
   a. Improve and customize the content and layout of websites and other communication tools.
   b. Notify members of updates, relevant products and services, and upcoming events and programs.
   c. Compile specialty directories.
   d. Track usage of websites and specific services.
   e. Assist the national and state REALTOR® associations and affiliated Institutes, Societies and councils in tracking membership and for their use for purposes similar to those listed above

C. COCBR will not share, sell, or otherwise provide this contact information about its members to any third party, except for:
   a. The national or state REALTOR® associations and affiliated Institutes, Societies, and Councils.
   b. Vendors with whom CCBOR has contracted to provide a specific service to the members.
   c. When required by law or valid legal process, or to protect the personal safety of its members or the public.

D. Credit information that members and credit authorizers provide when payments are made by credit card, debit card, or electronic check for products, dues, or other services will only be used to process the transactions requested. This information will be provided to and maintained by reputable credit reporting databases, but will never be sold, shared, or provided to other third parties.

E. COCBR maintains security procedures and standards believed to be as safe as today's technology permits. These procedures are tested and modified regularly as new technologies become feasible.

F. A member may edit their personal contact information by contacting the COCBR office and filling out an Association Change Form.

ARTICLE 4: BOARD OF DIRECTORS

Section 4.1 - Purpose

The Board of Directors (hereinafter, "Board") is the policy-making body of the Central Oregon Coast Board of REALTORS®-and is responsible for directing the activities of the Corporation. The Board will sign the following forms prior to service: 1) Oath of Office, 2) Anti-Trust Statement & 3) Code of Conduct. Examples of each are included in Addendum A.

Section 4.2 – Meetings

A. The Board shall designate a regular time and place for meetings to be held a minimum of ~~nine (9)~~ ten (10) times a year. Board members may attend meetings remotely via audio or video device. Remote attendance is sufficient for a quorum. Rev. 8/20/25

B. Members are welcome to address the Board during the designated time at the beginning of a meeting but will then be excused and only those who are bound by fiduciary duty to the Association may stay for the remainder of the meeting.

C. Anything brought into a Board meeting is considered a corporate document, including electronic devices. While not prohibited, Board members will be reminded at the opening of each meeting that electronic devices are subject to subpoena and Board members' use of them during a meeting is at their own risk.

D. Unexcused absence from 3 regular meetings per year shall be construed as resignation.

E. Roberts Rules of Order, the latest addition, shall be recognized as the authority governing the meetings of the Board, its Board of Directors, and committees; in all instances wherein, its provisions do not conflict with COCBR Bylaws.

Section 4.3 – Board Member Qualifications and Duties

A. Minimum Qualifications for all Board Members:
   a. Member of COCBR® or any other Association of REALTORS within Oregon for a minimum of two (2) years.
   b. Only REALTOR® Members may serve on the Board of Directors, except that one Director position may be filled by an Affiliate or the Treasurer may be filled by an Affiliate.
   c. Member may not have had their real estate license, or their appraisal license or certification suspended or revoked by the Oregon Real Estate Agency or the Oregon Appraisal Certification and Licensure Board in the past five (5) years; and may not have been found in violation of REALTOR® Code of Ethics in the past one (1) year; and may not have any unsatisfied sanctions or disciplinary actions pending.
   d. Members may not have any unsatisfied financial obligations to the Association.

B. **Qualifications Specific to Position:**

   a. <u>President:</u> Have served on the COCBR Board for a minimum of one (1) year in the position of President Elect.
   b. <u>Vice President:</u> Have served for a minimum of one (1) year on the COCBR Board in any position; or have served as President or Vice President on another real estate board.
   c. <u>President Elect:</u> Have a minimum of one (1) year past COCBR board or committee experience or experience with another real estate board.
   d. <u>Treasurer:</u> Comfortable with budgeting or general math calculations. Ideally, to have other board Treasurer experience and spreadsheets, such as excel.
   e. <u>Director:</u> Desire to serve COCBR.

f. State Director: Interest in local and state policies and laws that affect the REALTOR® profession. Have a minimum of one (1) year past COCBR board or committee experience, or experience with another real estate board.
g. Past President- This an appointed position at the discretion of the incoming president. This position can be held by the former president for a term of 1 year. Rev. 8/20/25

C. The Board reserves the right to waive any of these qualifications listed in Sections 4.3 A and B above.

D. Duties**:** The duties of the Officers, Directors and the Executive Officer are outlined in the attached documents in Addendum B.

Section 4.4 - Executive Committee

The Executive Committee (hereinafter "EC") conducts the affairs of the Association in accordance with the policies of the Board of Directors. In the event a decision or action is required between meetings of the Association, the EC is authorized to make decisions or take actions on behalf of the Association. The members of the EC shall be as follows: President, Vice President, and Treasurer. The President-Elect and the Past President may be included in a meeting if it is deemed necessary and at the discretion of the President for information required to decide or take action. The Executive Officer will serve as an advisory member. Rev. 8/20/25

Section 4.5 - Election of Officers and Directors

A. At least two (2) months before the annual election, the Election Committee Chairperson and Nominating Committee with a minimum of three (3) REALTOR® Members shall be appointed by the President with the approval of the Board. Rev. 8/20/25

B. The Nominating committee shall actively solicit candidates to run for each vacancy to be filled on the Board. All candidates shall be vetted to ensure they have the qualifications required in Section 4.3, for the positions of interest. The report of the Nominating Committee shall be delivered to each Member eligible to vote at least three (3) weeks preceding the election. To be included in the ballot, any eligible member wanting to run for a position on the Board shall notify the EO or the Nominating Committee at least two (2) weeks prior to the election, so that they may be vetted. No write in candidates will be allowed. The ~~Secretary~~ EO shall send notice of such additional nominations via ballot to all Members eligible to vote. Rev. 8/20/25

C. The election of Officers and Directors shall take place within the 4th quarter. The election shall be by ballot. The ballot shall contain the names of all candidates and the offices for which they are nominated. Where permitted by state law, and in accordance with applicable state requirements, the election of officers and directors may be conducted by electronic means, in accordance with procedures established by the Board. If an eligible voting member cannot vote via the given means, a ballot will be accepted through the EO at the Board office prior to the election. The Board shall be the determining vote, if necessary. The Election Committee Chairperson, one committee person and the COCBR EO will tabulate the ballots and announce the results to the members by email.

D. Elected Officers shall begin office on the first day of January following being sworn in.

Section 4.6 - Reimbursements

A. Reimbursement Policy

The Central Oregon Coast Board of REALTORS® shall reimburse, on a pre-approved basis, ordinary and necessary expenses for event registration, meals, travel and lodging for Board authorized members to attend. The Board will not reimburse spouse or guest expenses unless the spouse is an authorized attendee. The Board will not reimburse expenses for alcoholic beverages. The Board should encourage participation at the following events:

a. NAR® Convention
b. OR® State Convention
c. Realtor Day at the Capitol/Legislative Conference
d. Leadership Conference
e. Legislative Conference
f. Executive Officer Workshops
g. NAR Leadership in Chicago - President, President Elect., EO. Rev 8/20/25

B. Reimbursement Procedure

The Central Oregon Coast Board of REALTORS® will reimburse all individuals authorized to receive reimbursement for expenses associated with authorized travel provided:

a. The request for reimbursement is submitted to the Central Oregon Coast Board of REALTORS® within 30 days from the date the individual incurred the expenses.
b. Original receipts for all lodging and transportation expenses together with original receipts for any additional expenses are submitted with the request for reimbursement.
c. Expense reimbursement requests for airfare are based upon coach class fare.
d. Expense reimbursement requests for in-state travel are based on actual expenses incurred.
e. Submit receipts to be reimbursed for Industry pertinent conferences and events as requested at the annual budget meeting.
f. Mileage will be reimbursed at the current year's IRS mileage reimbursement rate.

C. Officer and State Director Travel

Pursuant to the Travel Reimbursement Policy and the annually approved budget, the Central Oregon Coast Board of REALTORS® will reimburse the President or State Director for authorized travel to the National Association of REALTORS® meetings contingent upon their attendance and participation at all relevant meetings including, but not limited to a. The Member and Director Update.

a. The meeting of the Oregon Association of REALTORS® NAR® Directors, if scheduled.
b. The National Association of REALTORS® Board of Directors meeting.
c. The Central Oregon Coast Board of REALTORS® President may make justifiable exception to this policy on an individual basis, in advance.
d. NAR Leadership in Chicago for the Pres/Pres. Elect. & EO.

D. Realtor of the Year Meeting Expense

The Central Oregon Coast Board of REALTORS® will reimburse the Realtor of the Year to attend the OR® awards ceremony.

ARTICLE 5: COMMITTEES AND WORK GROUPS

Section 5.1 – General Responsibilities

A. For the purpose of these policies, “Committee” refers to Standing Committees defined in the Bylaws. The term “Task Forces” is the collective term for any group formed to complete a specific task, purpose, event, or project for COCBR. The functions, responsibilities and programs of each Standing Committee or Task Force will be as directed by the Board.

B. Per Article XIII, Section 1 of the COCBR Bylaws, the standing committees are Education & Scholarship, RMLS/SAC, Finance & Budget, Bylaws/Policies/Roles, Government Affairs and RPAC, Core Standards, Strategic Planning/Calendar and Public Relations/Events.

C. The President has the authority to appoint any Task Forces as necessary, to implement specific projects, programs or events that have been approved by the Board of Directors.

D. Typical Task Force groups include BOD Nominating/Election, Realtor of the Year, Affiliate of the Year, Food Drive, and Office Manager/Principal Broker Meetings.

E. Committee or work group reports and recommendations shall be made directly to the Board of Directors on a periodic basis. Communications from each Committee regarding the committee’s and accomplishments shall come from the Chairperson, or at the direction of the Chairperson

Section 5.2 - Committee Absences

Committee members who miss meetings without notifying their chairperson or the Executive Officer may be replaced at the discretion of the President on the recommendation of the Chairperson.

ARTICLE 6: PROGRAMS AND SERVICES

Section 6.1 – New Member Orientation

A. For the purpose of these policies, Orientation is the collective term for the online NAR orientation module, the online NAR New Member Code of Ethics course, and a COCBR orientation held at the COCBR office.

B. New members will not be approved for active membership until after the applicant has paid their dues. After joining the Association, the applicant will have 30 days to complete the Code of Ethics training and Fair Housing courses required by NAR. The applicant will have sixty (60) days to complete the COCBR New Member Orientation. If the Orientation and Code of Ethics/ ~~starting in 2025~~ Fair Housing is not completed within the specified time frames, the application will be placed on Inactive status until these requirements are met, and the applicant’s Designated REALTOR® will be informed that the member has not completed their COCBR Orientation and Code of Ethics/Fair Housing. Rev. 8/20/25

C. If a new REALTOR® member applying for membership has been associated with another REALTOR® Association during the past twelve (12) months and provides a letter of good standing from the previous association and can provide proof of completing the NAR required Code of Ethics/ Fair Housing education within the past twelve (12) month period, the Orientation requirement may be waived, subject to approval by the Board of Directors at their next regularly scheduled meeting. In the event the Board of Directors does not approve

the waiver, the sixty (60) day timeframe to complete Orientation will start immediately following the Board meeting.

D. In order to facilitate timely processing of applications for membership and to assist associations in determining an applicant's qualification for REALTOR® membership, COCBR shall, based on a request from another association, share information about current or former members. Minimum "core" member information shall include:
   a. Previous applications for membership
   b. All final findings of Code of Ethics violations and violations of other membership duties within the past three (3) years (when available).
   c. Pending complaints alleging violations of the code of ethics or alleging violations of other membership duties.
   d. Incomplete or (pending) disciplinary measures.
   e. Pending arbitration requests or hearings.
   f. Unpaid arbitration awards or unpaid financial obligations to the Association.
   g. Any misuse of the term REALTOR® or REALTORS® in the name of the applicant's firm. COCBR may, at its discretion, consider information received from other associations when determining whether an applicant satisfies the association's membership requirements as established in the association's bylaws.

Section 6.2 – Professional Development

A. The Education Committee shall be responsible for planning and managing a program of continuing education classes each year.

B. The goals of the Education Committee are as follows:
   a. To directly sponsor or endorse through the support of our affiliates a minimum of 15 continuing education credits each year on a variety of topics.
   b. To include in the offerings (or direct members to free class offerings by NAR® or OR®) each year a 3-hour Rule and Law (LARRC) class, plus a class on legal liability, and any other required courses. Starting in 2025, a 2-hour Fair Housing and 2.5-hour Code of Ethics class will also be included. The Fair Housing and Code of Ethics are on the same three-year schedule for all REALTORS®.

C. Requests for speakers or other resource people related to the Central Oregon Coast Board of REALTORS® policies, programs, procedures and activities shall be coordinated through the Education Committee and/or the Executive Officer.

D. COCBR will be approved as a Certified Continuing Education Provider Affiliate Members who are providing a class for REALTORS® that qualifies for continuing education credit under Oregon Real Estate Agency rules, provided that the following criteria are met: a. The Affiliate is a member in good standing.
   a. The Affiliate's class does not conflict, in timing or in content, with a previously scheduled COCBR class.
   b. The class is open to all COCBR REALTOR® members.
   c. The Affiliate makes a written request not less than 30 days prior to the class, which shall include the date, time and location of the class, class topic, learning objectives, and instructor qualification forms as required by the Oregon Real Estate Agency.
   d. Any advertising for the event will include the notice that the class is being provided in coordination with the Central Oregon Coast Board of REALTORS®.
   e. The content and speaker are approved by the EO, or the Education Committee Chair.

E. If the Affiliate does not need a COCBR Board member or EO present, the Affiliate must agree to provide a sign-in sheet with a printed name, email address, license number and

signature of each attendee. This sheet shall be provided to the COCBR office not more than three (3) days following the conclusion of the class:

F. The Executive Officer and the Education Committee will adhere to the following procedures for maintaining continuing education in compliance with Oregon REALTORS® and Oregon Real Estate Agency requirements.

   a. All class instructors will be licensed or regulated in their field of expertise by the Federal, State of Oregon or local government responsible for their licensing and oversight or demonstrate experience and competence in their field. Employees/elected officials of government agencies may serve as instructors.

   b. Attendees must be present for the entire class to receive credit for the class.
   c. Education certificates will be emailed to all attendees within 1 week of the class.

   d. Copies of the class instructor's contact information, Class Subject/Date/Time and Education Class sign-in sheets will be kept at the Board office for possible inspection by the Real Estate Agency for a period of three years. The COCBR®'s Executive Officer is responsible for maintaining the education files at the COCBR® office.

   e. Announcements and registration sheets for educational classes will be made available to the membership via email, COCBR® E-Newsletter and at the COCBR® office.

   f. Pre-registration for all classes is required to ensure that an adequate supply of class curriculum is available, guarantee seating and ensure adequate venue capacity.

   g. Pre-registrants who are unable to attend are strongly urged to notify the COCBR® office and/or the Education Committee Chair if they are unable to attend. Non-registrants will be admitted to the class as seating is made available.

   h. The Educational Committee Chair will be available to all members for inquiries or requests for class registration materials.

   i. Educational classes will be free of cost to all COCBR® members and Affiliates unless otherwise noted on the registration materials.

Section 6.3.- Scholarship

A. The Scholarship Committee shall be responsible for selecting scholarship recipients each year.

B. The goals of the Scholarship Committee are as follows:
   a. To select a minimum of three (3) scholarship recipients each year to receive $1000.00. Applicants can be seniors from Siuslaw HS, Mapleton HS or current students at Lane Community College, but selection is at the discretion of the scholarship committee. Rev. 8/20/25
   b. Students will be selected by financial need, academic record and community involvement.
   c. The Scholarship Chair will review the status of the scholarships provided upon two years following being awarded. The review process will involve the assistance of the school counselor to verify admission. Rev. 8/20/25
   d. Students will receive certificates and an award letter at the high school scholarship event from a COCBR Board member. Examples of the Certificate and award letter (that outlines the requirements to receive the funds) are attached in Addendum C.

e. Selection is at the discretion of the scholarship committee.

Section 6.4.- Broker Tour Meetings

The Central Oregon Coast Board of REALTORS® Broker tour meetings shall be held every Wednesday morning at 8:30AM with a tour of homes following unless otherwise cancelled with notification to all participants with not less than 7 days prior notice. Attendance at the meetings and tour is strictly voluntary. Announcements of Board actions will be allowed as needed to keep the members well informed. Addendum D includes the Broker Tour Policy and Schedule

Section 6.5 - Lockbox Lending Library

A. The lockbox lending library is available to all Primary REALTOR® Members in good standing of the Central Oregon Coast Board of REALTORS® to use in any area, and to Secondary Members in good standing to use only in areas: 225, 226, 227, 228, 229, 230, 231 & 238 as defined by RMLS.

B. Members checking out a lockbox or transferring a lockbox between listings must follow procedures established by the Board. Members must email the provided Lockbox Request Form to the Executive Officer for COCBR @ officecocbr@gmail.com to request a lockbox or update when transferring a lockbox. Rev. 8/20/25

C. The Executive Officer (EO) will maintain a system to track lockbox usage to ensure all lockboxes are accounted for and returned within 30 days to the Board office following the termination (sale of property or expiry) of the listing.

D. In the event that a lockbox is significantly damaged (i.e., paint or paint spray on box, crushed, broken or missing parts of the box), or if a Member fails to return a box to the Board office within 30 days termination of the listing, the EO will send an email invoice, charging the Member $100, as stated on the lockbox checkout form. Rev. 8/20/25

Section 6.6 – Professional Standards

A. Per the COCBR Bylaws, Article VII, Section 1, the professional standards program for COCBR shall be governed by the National Association of REALTORS® Code of Ethics and Arbitration Manual and as outlined in these policies.
B. Per the COCBR Bylaws, Article VII, Section 3, COCBR has entered into a cooperative professional standards enforcement agreement with Oregon Realtors®, and pays an annual amount for the service, as well as a per hearing amount, as determined by Oregon Realtors®. The agreement is attached as Addendum E.

Section 6.7 – REALTOR® Of The Year Award

A. The REALTOR® of the YEAR (ROTY) program is designed to recognize a REALTOR® member of the Central Oregon Coast Board of REALTORS® who has provided outstanding service to the REALTOR® community. The purposes of the ROTY program are:
   a. Recognize and reward deserving REALTOR® members for efforts and work on behalf of their fellow REALTORS®, their profession and their community.
   b. Communicate to the general public, by these outstanding examples, the professionalism of REALTORS® and the outstanding work they do for their clients, customers, industry and community.
   c. Exemplify the qualifications, involvement and contributions required of those REALTORS® to be considered for leadership positions in organized real estate.
   d. Foster a spirit of competition among those REALTORS® who make outstanding contributions to their REALTOR® organizations, the profession, and the community in which they live.

B. The REALTOR® of the Year task force shall consist of the 5 previous recipients of the award. If the last 5 recipients are no longer active COCBR members, the task force will consist of at least 3 members or will go farther back to obtain additional previous ROTY recipients.

C. In the 4th quarter of the year, a request for nominations will be emailed to the Association's Membership with a minimum of 2 weeks' response time to the Association's Executive Officer. No member's nomination shall be considered if that member has received the ROTY award within the past five (5) years.

D. All nominees shall receive an application form to complete, which will be used to evaluate and select the recipient for the following year. That recipient shall be presented with the award at the Holiday Party/Induction Ceremony held in December month of each year.

E. Selection Criteria: In accordance with the Oregon Association of REALTORS® guidelines, the REALTOR® of the Year should be selected from the following guidelines:
   a. REALTOR® Spirit (25%) - Faithfulness and adherence to the principles of organized real estate, real estate laws and regulations, Board/Association Bylaws and the National Association of REALTORS® Code of Ethics: time and effort expended in furthering principles of good real estate practices in their own business and among other real estate brokers, the press and the general public: attainment of professional designations; etc.
   b. Activity in Community Affairs (20%) - Local, state and national participation in civic and service clubs and charitable activities; participation on political/governmental commissions and committees; fraternal and religious involvement; etc.
   c. Activity in Member Board (25%) - Member Board offices held, committee work; special assignments; seminar and educational attendance or teaching; membership and offices held in state chapters of NAR institutes, societies and councils; etc.
   d. Activity in State Association (15%) - State association offices and leadership positions held; committee work; attendance and participation at state conventions, directors' meetings and education programs; etc.
   e. Activity in National Association (5%) - National offices and leadership positions held; committee work; member and work in NAR institutes, societies and councils; attendance at National conventions and business meetings; etc.
   f. Business Accomplishments (10%) - Public recognition of business conduct and achievements; service to clients and customers; imaginative and creative advertising programs; rehabilitation work; land utilization; etc.

F. The recipient's name will be submitted to Oregon Realtors® for recognition at the Spring Governance luncheon. If the candidate also meets the State Realtor of the Year criteria, an application will be completed and submitted to Oregon Realtors® prior to the application deadline. The Central Oregon Coast Board of REALTORS® will reimburse the Realtor of the Year recipient so they may attend OR® Spring Governance luncheon.

Section 6.8 – Affiliate Of The Year Award

A. The Affiliate of the Year task force shall be the executive committee members.

B. In the 4th quarter of the year, a request for nominations will be emailed to the Association's Membership with a minimum of two weeks for response time to the Association's Executive Officer. No member's nomination shall be considered if that member has received the AOTY award within the past five (5) years.

C. While Affiliate memberships are by firm rather than an individual, any Primary Contact or Roster Affiliate of an Affiliate member firm is eligible to receive the award.

D. All nominees shall receive an application form to complete, which will be used to evaluate and select the recipient for the following year. That recipient shall be presented with the award at the Holiday Party/Induction Ceremony held in December month of each year.

E. Selection Criteria:
    a. Ethics and Cooperation (50%) – honesty and integrity in ethical standards, professionalism in business practices, promoting the image of the real estate industry and COCBR in relations with the public, proper business etiquette, and helpfulness and cooperation with others in the business should be beyond reproach.
    b. Association Participation (20%) – participation with COCBR's Board of Directors and/or Committees, special assignments, seminar and educational attendance or teaching, sponsored functions, membership and offices held in state chapters of NAR institutes, societies, and councils, etc.
    c. Activity in Community Affairs (15%) – local, state, and/or national participation in civic and service clubs and charitable activities; participation in political/legislative commissions and committees; fraternal and/or religious involvement; etc.
    d. Continuing Education (10%) – Advances skill level with the industry through procuring, hosting or promoting continuing education classes and seminars, and through attendance or teaching and freely shares knowledge with others.
    e. Business Accomplishments (5%) – Public recognition of business conduct and achievements; service to clients and customers; imaginative and creative advertising programs; etc.

ARTICLE 7: FINANCE AND ACCOUNTING

Section 7.1 - Zero Based Budgeting, User Fees and Core Services

The Central Oregon Coast Board of REALTORS® shall use a zero-based budgeting model in the process of developing and approving its annual budget, adopting in the process the "Core Services" and "User Fee" concept. Core Services are those programs and services that benefit all members and therefore are supported by members' dues. User Fee programs and services are those that benefit only those who participate in the program or activity and therefore are funded by the members who use them.

Section 7.2 - Annual Proposed or Approved Budget

A. It shall be the responsibility of the Executive Officer, Treasurer, and the Finance Committee to prepare an annual budget for approval by the Board of Directors. The Board shall review and discuss the budget for the following year no later than the November Board meeting. The incoming Treasurer shall be invited to all Finance and Budget Committee meetings to plan and discuss the budget for the following year.

B. In addition, the budget will be reviewed quarterly by the Executive Officer/Treasurer and amended with Board approval.

Section 7.3 - Expenditures Authorization

Any amendments or proposals to increase expenditures in the Central Oregon Coast Board of REALTORS® proposed or approved annual budget in excess of $200.00 (individual or cumulative) in any budget line item must be submitted in writing to the Executive Officer prior to the meeting at which the amendment or proposal will be presented to the Board of Directors.

Section 7.4 - Operating Funds and Investment Policy

All operating funds, not immediately required, and all special funds (reserve accounts) shall be invested in interest-bearing accounts through federally insured or SIPC insured financial institutions, which offer the highest available yield at the time of investment and shall be reviewed annually.

Section 7.5 - Bank Accounts

The Central Oregon Coast Board of REALTORS® shall maintain its funds in local FDIC insured financial institutions, with preference given to those institutions who are affiliate members of COCBR®. The treasurer may recommend to the Board of Directors changing or adding banking institutions at any time.

Section 7.6 - Signatures on Bank Accounts

A. At the beginning of each year, signature cards will be re-issued with the names of the new President, Vice President, Treasurer and Executive Officer, as signers of checks and on Certificates of Deposit and other investment accounts.

B. The Executive Officer (EO) is given authority to pay all Board approved and budgeted fixed annual expenses without additional signatures and approval by the Board. If the fee for any of the services changes, the Board or the Executive Committee must be notified, and approval is received before paying the changed amount. These preapproved expenses include the following:

   a. Professional Standards OR Management Fee,
   b. Florence Chamber Annual Membership fee,
   c. CE Provider OR Certificate,
   d. Oregon State Corp. license fee,
   e. P.O. Box annual rental fee,
   f. QuickBooks, Zoom annual fees, annual audit fees, website services.
   g. RMLS Leased Employee, Bookkeeper monthly, routine fixed expenses.
   h. Lawyer retainer fees.

C. The Central Oregon Coast Board of REALTORS® checking account requires two signatures on all checks written over $200.00, unless the check is for a routine, pre-approved fixed expense. Signatories may not sign checks made out to themselves if the value of the check is greater than fifty dollars ($50.00).

D. Payments by credit card or Electronic Funds Transfer (EFT) are used for those vendors who do not accept checks, or where the payment is time sensitive. Credit card or EFT payments must be approved by 2 signatories, unless they are part of the EO authorized, pre-approved fixed expenses.

Section 7.7 - Corporate Credit Card

President, Vice President and Executive Officer may be issued a corporate credit or debit card to be used for certain board related expenses including but not limited to travel & meetings, event registration, and other related board purchases. Credit limits to be established annually by the Board. If the Board finds itself without an acting President, Vice President, Treasurer or Executive Officer, they must continue to keep three authorized signers on each financial account. The additional signers shall be selected from the current Board of Directors and must be approved by the majority vote of the Board of Directors.

Section 7.8 - Reserve Funds

It shall be the goal of the Central Oregon Coast Board of REALTORS® to maintain a minimum of six (6) months operating expenses in a reserve fund, in accordance with the recommendation of the National Association of REALTORS®. Guidelines for investment are as follows:

A. All reserve funds shall be placed in federally insured accounts.
B. All maturities should be staggered whenever possible.
C. All Association monies shall be deposited in interest bearing accounts, whenever possible
D. All interest shall be reinvested, as directed by the Board.

Section 7.9 - Investment Responsibility

The Treasurer shall be responsible for investing the Central Oregon Coast Board of REALTORS® monies, over and above those needed for operations and pursuant to guidelines established herein or as approved by the Board of Directors. Unless otherwise instructed by the Board of Directors, the Treasurer will invest available monies pursuant to the following guidelines:

A. All funds possible shall be placed in interest bearing accounts.
B. Whenever possible, investment periods should not exceed five years.

Section 7.10 - Books and Records

The Executive Officer of the Central Oregon Coast Board of REALTORS® shall maintain the following records in compliance with Internal Revenue Service requirements and policies of the National Association of REALTORS®.

A. Cash Receipts/ Disbursements
B. Membership Rosters
C. QuickBooks Accounts
D. Office Equipment Records
E. Inventory Records
F. Investment/Bank Account Records

Section 7.11 - Internal Financial Support

The Executive Officer of the Central Oregon Coast Board of REALTORS® shall provide, on a monthly basis, to the Board of Directors the following financial reports:

A. Balance Sheet,
B. Statement of Income & Expense,
C. Budget Variance Report,
D. Summary of Cash Receipts and Disbursements,
E. Credit card statements

Section 7.12 - Taxes

A. The Executive Officer and Treasurer shall prepare and file the annual tax return as required for a non-profit organization and maintain the required records.

B. COCBR is classified as a 501(c)6 tax exempt trade association by virtue of an IRS determination letter. On an annual basis, 501(c)6 organizations are required to complete the IRS Form 990 – Return of Organization Exempt from Income Tax.

C. Even though COCBR is a tax-exempt organization, it may generate some income that is unrelated to its tax-exempt status. This income shall be reported annually on the IRS Form

990-T – Exempt Organization Business Income Tax Return and any corresponding tax liability is remitted in a timely manner.

D. To ensure the Association's tax-exempt status is protected, unrelated business income is monitored on an on-going basis.

Section 7.13 – Annual Audit

The accounts of COCBR shall have an annual audit, review or compilation as of the close of the fiscal year by a Certified Public Accountant. The Finance Committee shall select the firm, and it shall be approved by the BOD. The Executive Officer and bookkeeper shall prepare the financial records for a compilation report prepared by a Certified Public Accountant as stipulated by NAR's CORE Standards.

Section 7.14 - Insurance

It shall be the responsibility of the Executive Officer to maintain insurance which reflects staff of the Association, as directed by the Board.

Section 7.15 – Method of Accounting

The accounting records of the Central Oregon Coast Board of REALTORS® shall be maintained on a cash basis.

ARTICLE 8: DUES AND FEES

Section 8.1 – Application Process and Dues Billing

Combined COCBR®, OR®, and NAR® dues will be announced to the membership at least two months before January 1st of the year being billed and at least two further announcements made between the first announcement date and January 1st. Partial payments will be accepted with executive committee approval.

Section 8.2 - Dues Refund

No refund of dues paid to the Central Oregon Coast Board of REALTORS® shall be given after commencement of the current year for which the dues were collected without Board approval.

Section 8.3 - Reinstatement Fees

A full year's dues shall be charged plus a $50.00 reinstatement fee for all members suspended for failure to pay their dues. As of January 2nd, the COCBR Executive Officer will contact any member who is delinquent and make arrangements for payment to renew their membership in the same calendar year (OR and any other reinstatement fees still apply).

Section 8.4 - Bank Charges

Should a member's check be returned from their financial institution to the Central Oregon Coast Board of REALTORS® for any reason, the member will be charged $50.00 for returned checks.

ARTICLE 9: RECORD RETENTION POLICY

Section 9.1 – Corporate Records

COCBR retains corporate records per the schedule below. Records will be maintained in hard copy format and are required to be duplicated in digital format for all items that are to be kept permanently (nonpermanent records are optional at staff's discretion to be duplicated in digital format). The hard copy records will be stored at the CCBOR office and digital records will be kept on the main server at the COCBR office and at the approved off-site backup location(s). For non-permanent records, hard copies will be shredded at the conclusion of the required period and digital copies will be deleted from the main server and all back-up servers.

Section 9.2- Review of corporate records (budget & board documents) by a COCBR member will take place as follows - the member, in good standing, will submit their request in writing and specify what it is they wish to review. Within 5 business days the COCBR Executive Officer or Board President will make those available to review at the board office.

Accounting & Tax Records	**Years to Keep**
Accountant & Taxes	
Audit Reports	Permanent
Annual Review	Permanent
Depreciation Schedule	Permanent
Income Tax Returns – Federal	Permanent
Income Tax Returns – State	Permanent
Income	
Accounts Receivable	7
Cash Receipts & Deposit Records	7
Deposit Slips	7
Sales Records	7
Expenses	
Accounts Payable	7
Check Stubs (routine matters)	7
Check Stubs (special – loan repayments, property purchases, etc.)	Permanent
Employee Expense Reports	7
Fixed Asset Acquisition Invoices	7 (after disposal)
Insurance Policies	3(after expiration)
Purchase Invoices	7
Financial Statements	
Annual & Monthly Financial Statements (in-house)	7
Bank Statements & Reconciliations	7
Budgets	2
Deeds and Closing Papers	Permanent
General Ledgers	Permanent
Inventory Counts	7
Investments	7 (after disposal)
Mortgages, Loans, and Leases	7 (after pay-off)
Corporate Records	
Articles of Incorporation and Amendments	Permanent
Board of Directors Meeting Minutes	Permanent
Bylaws and Amendments	Permanent
Copyrights, Patents, Trademarks, etc.	Permanent
Corporate Filings	Permanent

Policies and Procedures	Permanent
Property Damage Records	7
Property Records (including appraisals, blueprints, deeds, easements, etc.)	Permanent
Rules and Regulations	Permanent
Service Mark License Agreements	Permanent
Territorial Jurisdiction	Permanent
Insurance Records	
Accident Reports	6 (after settled)
Claims	10 (after settled)
Fire Inspection Reports	6 (after settled)
Group Disability Records	8
Policies 3 (after expiration)	
Safety Reports	8
Legal Documents	
Contracts	7 (after expired)
Licenses	1 (after expired)
Membership Records	
Member Files for Members in good standing	2 (after termination)
Member Files for Members with outstanding obligations	7 (after termination)
Professional Standards	
Case File	1 (after completion of all sanctions/payment of award)
Result of Hearing Log	Permanent

Section 9.2 - Member and Service Records

The COCBR® Office shall maintain a master database (roster) of all active members by category REALTOR® or Affiliate. Said information shall be retained solely for the use of members of the Board of Directors and appointed committee chairpersons. In no case shall the membership roster be accessible to any person, group or organization other than COCBR®. However, a mailing list of REALTOR® Brokerage firms may be distributed upon request.

Further, no individual or service information contained in COCBR® records shall be made available to any person, group, or organization other than as authorized by this paragraph, without the express written consent of the subject individual. The COCBR® office shall also maintain a list of committees, committee chairpersons, and current data on committee activity. This information shall be available to any COCBR® member upon request.

Addendum A – Board Member Signature Documents

CENTRAL OREGON COAST
BOARD OF REALTORS®
Florence, Oregon

Officer & Director Code of Conduct

I will exercise the duties and responsibilities of this office with integrity, professionalism and respect. Under oath, I pledge:

A. To attend all board, committee and task force meetings on which I serve. I understand that without an prior excused absence, failure to attend three (3) board meetings is cause for dismissal from the board.
B. To become familiar with the organization's governing documents, policies and procedures so that I can be an informed representative when called upon.
C. To come prepared to discuss the issue and business to be addressed at scheduled meetings, having read the agenda and relevant background material when applicable.
D. To maintain confidentiality of information received for governance and decision making at board meetings.
E. To observe the rules of order and display courteous conduct in all board, committee and task force meetings.
F. To work with and respect the opinions of my peers who serve on this board, and to leave my personal prejudices out of discussion and decisions.
G. To always act in the best interest of the organization, the membership, leadership, volunteers and staff.
H. To represent this organization in a positive and supportive manner at all times and in all places.
I. To act as a resource in identifying issues, opportunities and challenges facing the organization, community and membership that may deserve the attention of the board and staff.
J. To serve on or act as liaison to at least one committee and keep the board informed of its' progress and goals.
K. To avoid conflicts of interest between my position as a board member, and my professional and personal life. If such conflict does arise, I will declare that conflict and refrain from voting in matters in which I have conflict.
L. To support in a positive manner all actions by the board of directors even when I am in a minority position on such actions.
M. To maintain a professional business relationship with the organization's staff and any contractors.
N. To refrain from impeding the work of committees or staff based on the responsibilities and authorities for which they have responsibility.
O. To comply with local, state and federal laws and to protect the interest and property of the organization.

Initial: _____ 1of 2

Central Oregon Coast Board or REALTORS® last update 11/22/2021

Addendum A – Board Member Signature Documents

CENTRAL OREGON COAST
BOARD OF REALTORS®
Florence, Oregon

Association's Code of Conduct

All Association Officers, Directors and Staff members shall abide by the following terms:

INTRODUCTION

Members of the Board of Directors and staff carry certain duties and responsibilities for the well-being of the organization. The Code of Conduct outlines some of those duties and responsibilities in accordance with governing documents.

CONFIDENTIALITY

BOD members and staff will have access to information that, if revealed to outsiders, could be damaging or sensitive to other members or staff; harmful to the best interests of the organization or even create legal liability. Information provided to the board and staff may concern personnel, financial, contractual, membership or legal matters. It will often be confidential and is intended for use in decision making and governance. Information shall be held in the strictest of confidence and shall not be divulged to any outside party, including other members, without authorization of the board chair or organization executive.

CONFLICTS OF INTEREST

BOD members and staff members owe a high fiduciary duty to the organization. Thus, no BOD or staff member shall maintain any business enterprise or other activity that directly conflicts with the interests of the organization. Staff members shall not solicit members for any reason that is not directly related to official business.

VIOLATIONS

Violations of the Code of Conduct may result in disciplinary action in accordance with the governing documents. Discipline may include removal of a board member from office or termination of a staff member.

Acknowledgement of Receipt

I acknowledge that I have received and read a copy of the Association, Officer & Director Code of Conduct and that I am responsible for compliance.

_____ _____

BOD Member name: Date

Governing documents include articles of incorporation, bylaws, policy manual, etc.

Central Oregon Coast Board or REALTORS® last update 11/22/2021

Addendum A – Board Member Signature Documents

CENTRAL OREGON COAST
BOARD OF REALTORS®
Florence, Oregon

Association's Antitrust Statement

In order to ensure that the Association and its members comply with antitrust laws, the following principles will be observed:

- The Association or any committee, section, chapter, or activity of the Association shall not be used for the purpose of bringing about or attempting to bring about any understanding or agreement, written or oral, formal or informal, expressed or implied, among two or more members or other competitors with regard to prices or terms and condition of contracts for services or products. Therefore, discussion and exchanges of information about such topics will not be permitted at Association meetings or other activities.

- There will be no discussions discouraging or withholding patronage or services from or encouraging exclusive dealing with any supplier or purchaser or group of suppliers, any actual or potential competitor or group of actual potential competitor or group of actual potential competitors or any private or government entity.

- There will be no discussions about allocating or dividing geographic or service markets or customers.

- There will be no discussions about restricting, limiting, prohibiting, or sanctioning advertising or solicitation that is not false, misleading, deceptive, or directly competitive with Association products or services.

- There will be no discussions about discouraging entry into or competition in any segment of the marketplace.

- There will be no discussions about whether the practices of any member, actual or competitor, or other person are unethical or anti-competitive, unless the discussions or complaints follow the prescribed due process provisions of the Association's bylaws.

- Certain activities of the Association and its' members are deemed protected from antitrust laws under the First Amendment right to petition government. The antitrust exemption for these activities, referred to as the No err-Pennington Doctrine protects ethical and proper actions or discussions by members designed to influence:

  (1) Legislation at the national, state and local level;
  (2) regulatory or policy making activities (as opposed to commercial activities) of a governmental, body, or
  (3) Decisions of judicial bodies. However, the exemption does not protect actions constituting a "sham" to cover anti-competitive conduct.

Initial: _____

Addendum A – Board Member Signature Documents

- Speakers at committees, educational meetings, or other business meeting of the Association shall be informed that they must comply with the Association's antitrust policy in the preparation and the presentation of their remarks. Meetings will follow a written agenda approved in advance by the Association or its' legal counsel.

- Meetings will follow a written agenda. Minutes will be prepared after the meetings to provide a summary of important matters discussed and actions taken, or conclusions reached.

- At informal discussions at the site of any Association meeting all participants are expected to observe the same standards of personal conduct as are required of the Association in its compliance.

Antitrust Statement

I, _____ as an Officer /Director of the Central Oregon Coast Board of REALTORS® have read and understand the current Antitrust Statement and agree to abide by the Antitrust Statement and policies of the Association as may be amended from time to time.

_____ _____

BOD Officer or Director Date

Addendum B – COCBR Position Descriptions

President

The President shall:

1. Serve as the chief presiding officer of COCBR. The President will preside at all meetings of the general membership and the Board and the EC.

2. Represent COCBR in relations with the public, governmental entities, the members, all other REALTOR® Associations, allied organizations, and the media.

3. Direct the activities of the Board in accordance with their position descriptions and arrange training for incoming new Directors and Officers.

4. Ensure that the policies and programs which further the goals and objectives of COCBR, are planned, implemented, and evaluated.

5. Appoint with Board ratification, Directors for the Board, committee chairs and members, where required by the individual policies of the committee, and task forces and work groups as needed throughout the Board year.

6. President can but is not required to serve as an ex-officio member of all committees and ensure that committee and task force chairs are informed of their purpose and duties and monitor their progress throughout the year. Rev. 8/20/25

7. Attend industry pertinent conferences and events as funds are available in the annual budget, including, but not limited to OR Board of Directors meetings, NAR Mid-Year Meetings, and the NAR REALTOR® Convention.

8. Assist the President-Elect in an orderly transition to President.

9. Induct new members.

10. Complete such special responsibilities as may be delegated by the Board. Serve on Strategic Mapping & Project Areas assigned on an annual basis. Rev. 8/20/25

Vice President

The Vice President shall:

1. Serve on the COCBR Board and EC and attend all COCBR meetings.

2. Collaborate with the President and the Board to shape the strategic direction and objectives of COCBR.

3. Ensure adherence to COCBR's Bylaws and Policies and Procedures, and work with the Board to review and update them as needed.

4. Ensure quorums are met when voting occurs for Board and COCBR membership events or meetings.

5. Assist the Calendar Committee in preparing and updating the annual calendar of activities.

6. Serve as the communications lead, preparing flyers and other notices for the membership.

7. Foster positive relationships with COCBR members, providing guidance, support and assistance as needed.

8. Assist with planning and execution of training for incoming new Directors and Officers.

9. Preside at all meetings of the general membership and the Board in the event of the President's resignation, removal or temporary absence.

10. When the President is unavailable, represent COCBR in relations with the public, governmental entities, the members, all other REALTOR® Associations, allied organizations, and the media.

11. In coordination with the President, serve as an ex-officio member of the standing committees or task forces not being covered by the President.

12. Attend industry pertinent conferences and events as funds are available in the annual budget.

13. Complete such special responsibilities as may be delegated by the President and/or the Board. Serve on Strategic Mapping & Project Areas assigned on an annual basis. Rev. 8/20/25

President-Elect, (Past-President) alternate years

The President-Elect shall:

1. Serve as a member of the COCBR Board and EC and attend all meetings. Active attendance and involvement in this training position serves to prepare the President Elect to assume the position of President.

2. Serve on Strategic Mapping & Project Areas assigned on an annual basis.

3. Serve on at least one standing committee or task force. Rev. 8/20/25

Addendum B – COCBR Position Descriptions

Treasurer

The Treasurer shall:

1. Serve on the COCBR Board and EC and attend all COCBR meetings.
2. Serve as the chair of the Finance Committee and represent the best interests of the entire Association pertaining to fiscal responsibility and the financial soundness of the Association.
3. Prepare (along with the AE, and the Finance Committee) the annual budget, and upon Board approval, see that the Association operates within the projected annual budget and in accordance with the financial policies approved by the Board.
4. Work with bookkeeper to update Quick books with all deposits, checks written, credit card charges, and CD interest and assign categories.
5. Present financial statements, including summary of income, expenses and current budget to the EC and BOD at each meeting.
6. Approve and sign checks, banking and legal documents as required.
7. Confirm an annual audit is performed by a CPA selected by the Board.
8. Complete such special responsibilities as may be delegated by the President and/or the Board.

Directors

The Directors shall:

1. Attend all COCBR Board meetings, and events.
2. Be fully informed of all Association-related events and issues.
3. Serve as chair on at least one standing committee or task force and report committee's activities to the Board.
4. Complete such special responsibilities as may be delegated by the President and/or the Board.

Addendum B – COCBR Position Descriptions

State Director

The State Director shall:

1. Attend all Board and other COCBR meetings and events.
2. Serve as the chair on the Government Affairs Committee and report committee's activities to the Board.
3. Report to the Board pertinent discussions or actions discussed at OR® Board meetings that can affect the members.
4. Attend OR® Board of Directors meetings and act as COCBR representative at these meetings.
5. Be encouraged to apply for OR® committee positions.
6. Be fully informed of all related events and issues for both Associations.
7. Attend Spring and Fall Conference board meetings (virtual if necessary), and industry pertinent conferences and events as funds are available in the annual budget.
8. Complete such special responsibilities as may be delegated by the President and/or the Board.

Past President

When appointed at the discretion of the incoming president:

1. Serve as a member of the COCBR Board and EC and attend all meetings.
2. Serve on Strategic Mapping & Project Areas assigned on an annual basis.
3. Serve on at least one standing committee or task force. Rev. 8/20/25

Addendum B – COCBR Position Descriptions

Executive Officer

Board of Directors Activities

1. Work with the president to prepare Board meeting agendas, send out meeting notices and collect committee reports.
2. Email and provide copies of monthly meeting notices and attachments to Board members.
3. Prepare staff (EO) report for meetings.
4. Send out special meetings, CE class notifications, dues reminders, etc. as needed.
5. Attend Board and committee meetings.
6. Assist with the planning of Board events and activities.

Communication Activities

1. Prepare and email monthly newsletter to membership.
2. Prepare and email other important event notices.
3. Update web page with newsletter and CE class info/links.
4. Update social media (Facebook and Twitter) accounts with COCBR activities and important homeowner events.

New Member Orientation Activities

1. Receive and process applications from new members.
2. Provide COCBR orientation to new members and provide the link to access NAR Code of Ethics and other NAR online courses. Familiarize new members with the use of RMLS and point out further options for training.

Financial Activities

1. Collect dues from all members and notify in writing those who owe dues.
2. Disperse dues allocations to OR and NAR.
3. Maintain the tax-exempt number for the organization.
4. Verify and pay bills on behalf of the board and coordinate the required signatures or approvals.
5. Deposit checks.
6. Work with bookkeeper to update Quick books with all deposits, checks written, credit card charges, and CD interest and assign categories.
7. Maintain calendar with Board task due dates, CE classes, membership events and CD maturity dates.
8. Arrange with accountant for yearly audit of books.
9. Prepare and submit yearly nonprofit status tax report.

Executive Officer (cont.)

Misc. Other Activities

1. Prepare and manage weekly tour.
2. Maintain lockbox lending library and annually audit the lockbox inventory.
3. Backs up and organize all COCBR files and records to Google Drive (officecocbr@gmail.com) on a monthly basis, minimum.
4. Maintains Core Standards status and submits yearly report.
5. Maintain OREA CE Provider license and assist with continuing education activities.
6. Prepare and distribute CE certificates as required for Board sponsored classes.
7. Assist with elections, ballots and voting as needed.
8. Attend EO/AE training sessions as required, and as recommended by the Board.

Addendum C – Scholarship Certificate and Award Letter

CENTRAL OREGON COAST BOARD OF REALTORS®

| OfficeCOCBR@gmail.com

[Date]

[Recipient Address]

Dear [Recipient Name]

Congratulations!

You are the winner of a $1,000 Scholarship from the Central Oregon Coast Board of REALTORS®.

As soon as you have enrolled in your school, please contact the business office at Siuslaw High School. They will need the name, address, and contact name of the school, as well as a copy of your confirmation to attend. At that time, they will deliver your scholarship funds directly to the school in your name.

Attached please find a certificate which you may keep for your records, and if possible, we would love to have a photo of you with the certificate to use on your website.

We wish you good luck in your academic future as well as your career. Keep up the great work!

Sincerely,

[COCBR President Name]
President, COCBR

1234 Rhododendron Drive, Suite 8 | Po Box 414, Florence, OR 97439

Office: 541-991-7234 | www.COCBR.net

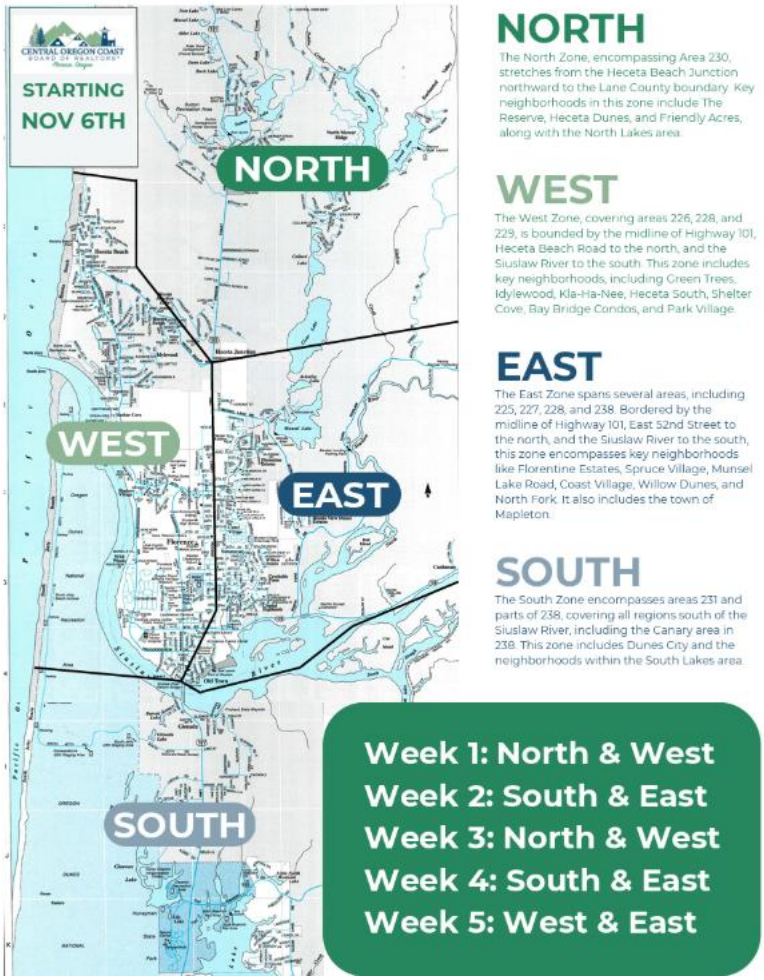
CENTRAL OREGON COAST BOARD OF REALTORS®
Florence, Oregon

Addendum D – Broker Tour Policy and Schedule

Central Oregon Coast Board Of Realtors (COCBR) Wednesday Broker Tours Policy

1. **Purpose:** The purpose of the Central Oregon Coast Board Of Realtors (COCBR) Wednesday Broker Tours is to promote cooperation and networking among local brokerages, facilitate the showcasing of new and existing properties, and strengthen the real estate market in the region.

2. **Tour Schedule and Listing Criteria:** The Wednesday Broker Tours will take place every Wednesday, unless otherwise notified, with the following tour schedule:
   - Week 1: North & West
   - Week 2: South & East
   - Week 3: North & West
   - Week 4: South & East
   - Week 5: West & East Rev. 8/20/25



Each tour will include a maximum of six homes. The selection of homes on the tour will be based on the first five listings received by 3:00 pm on the Tuesday prior to the tour. To be eligible for inclusion, all listings must be live in the MLS before submission. The COCBR Executive Officer will provide the Tour sheets at each meeting.
If the weekly tour list exceeds six listings, the last listing in Area 228 to be added will get bumped to the following week. Any 228 bumped listing will not get bumped more than one week. Any questions regarding area boundaries or general tour procedures, contact the EO before adding your listing tour.

3. **Brokerage Packages**: Brokerages are encouraged to provide no less than 30 copies of brokerage packages for distribution during the meetings. The brokerage packages should include information on the following:
    - New listings
    - Price reductions
    - Pending properties
    - Recent sales

4. **Meeting Hosts**: Meetings will be hosted by the COCBR Executive Officer. In their absence an assigned board member will assume the hosting duties.

5. **Home Hosting Responsibilities:** Homes on the tour must be hosted by the listing broker or co-listing broker. If a broker has two homes on the tour, they are required to have an assistant, or another broker holds open one of the homes during the tour. Tour homes cannot be left unattended. The listing agent must attend the weekly tour meeting by 8:30am. The listing agent can share any important information with the attending brokers, such as gate codes, special times, drawings, etc. If a broker is holding a listing open for another broker, they need to attend the weekly tour meeting. If neither broker attends the tour meeting, a donation in the amount of $25 for the COCBR scholarship fund is required. The EO will reach out for the donation.

6. **Meeting Protocol:** The COCBR Executive Officer shall arrive at the senior center no later than 8:15 am to greet brokers and affiliates as they arrive for the meeting. Broker participants are encouraged to attend the Wednesday Broker Tour meetings. While attendance is not mandatory, it is highly recommended as it fosters relationships among brokerages and strengthens the local market Affiliates are welcome to attend both the Broker Tour meetings and the tour itself. Their attendance provides an opportunity for networking and collaboration within the real estate community.

7. **Amendments:** This Broker Tour Policy may be amended at any time, as deemed necessary by the Central Oregon Coast Board of Realtors (COCBR), to enhance the efficiency and effectiveness of the Wednesday Broker Tours. This policy is hereby established and approved by the Central Oregon Coast Board of Realtors (COCBR) to be effective as of the date mentioned above.

Addendum E – Professional Services Agreement

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Professional Standards Administration Enforcement Agreement

Section 1 – Parties
The following is an agreement ("the Agreement") between the Oregon REALTORS® and the _____ of REALTORS® ("the Board").

Section 2 – Terms of Service
Oregon REALTORS® shall provide the Board with Professional Standards Administration services beginning _____. These services shall continue until cancelled by either party pursuant to Section 6 hereof.

Section 3 – Fees
Any fees not paid by the 15th of the month after the invoice is delivered shall result in default of this agreement and suspension of services provided by Oregon REALTORS®.

For services provided, Oregon REALTORS® shall charge the Board:

(Select one Option according to the size of local association)
NAR Association size definition by member count: Small = 499 or less; Medium = 500-1,999; Large = 2,000+

☐ **Option 1: Small or Medium Board**
A fee equal to $0.40 per member, per month. This fee shall be billed monthly (unless otherwise arranged with Oregon REALTORS® Finance Department for annual billing) and due immediately upon receipt. The membership number used to calculate this fee shall be the membership number given from the Oregon REALTORS® Membership Department on December 31st of each year.
This charge shall include a Professional Standards file review by legal counsel, and services required through an appeal or procedural review process.

Additionally, a fee of $500.00 will be charged to the Board for each case forwarded through to an ethics or arbitration hearing.

☐ **Option 2: Medium Board**
Annual fee of $7,500.00. This charge shall include a Professional Standards file review by legal counsel, and services required through an appeal or procedural review process. *(Annual Fee to be prorated monthly if not commencing in January)*

☐ **Option 3: Large Board**
Annual fee of $7,500.00. This charge shall include a Professional Standards file review by legal counsel, and services required through an appeal or procedural review process. *(Annual Fee to be prorated monthly if not commencing in January)*

Additionally, a fee of $500.00 will be charged to the Board for each case forwarded through to an ethics or arbitration hearing.

☐ **Option 4: Large Board**
Annual fee of $12,500.00. This charge shall include a Professional Standards file review by legal counsel, and services required through an appeal or procedural review process. *(Annual Fee to be prorated monthly if not commencing in January)*

2023 PSA Enforcement Agreement-August 2022

Addendum E – Professional Services Agreement

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Professional Standards Administration Enforcement Agreement

Section 4 – Services Provided

Oregon REALTORS® shall provide the following Professional Standards services:

(a) Provide a state Professional Standards committee for performance of all Professional Standards activities with regional representation.
(b) Administer all Professional Standards inquiries and requests, including Ombudsman and Mediation.
(c) Coordinate and schedule all meetings, conference calls, and hearings.
(d) Provide administrative support at each hearing or meeting.
(e) Facilitate Appeal Hearings and Ratification of the Decisions of the Hearing Panels;

(Select one)

☐ The local Board of Directors will facilitate/retain control of the process of appeal hearings and ratification of Decisions of Hearing Panels.

☐ The local Board of Directors defers control of the process of appeal hearings and ratification of Decisions of Hearing Panels to the appointed Panel of State Directors.

(f) Maintain all professional standards records.
(g) Provide activity reports; frequency to be determined by the Board.

Section 5 – Conditions of Services

Oregon REALTORS® and the Board agree to the following conditions of services:

(a) Contact for Professional Standards Administration shall be limited to the Association Executive, President, or an appointed Professional Standards liaison.
(b) Professional Standards Administration and activities shall be provided virtually. If an in-person hearing is deemed necessary by the President of the Board, the Board will cover travel expenses of the administrator and the hearing panel.
(c) Professional Standards Administration where a multi-board (or regional) enforcement agreement exists shall require each signatory board to enter this Agreement.
(d) The Board agrees to adopt the Oregon REALTORS® Professional Standards Administration Enforcement policies that conforms the Code of Ethics and Arbitration Manual to comply with local policy and state law.
(e) The Board agrees to adopt Oregon REALTORS® Citation Policy and Schedule of Fines; Oregon REALTORS® policy will supersede The Board's Citation Policy and Schedule of Fines previously used, if applicable; The Board will inform their members of the Citation Policy and Schedule of Fines.

Section 6 – Cancellation & Renewal

This agreement shall automatically renew monthly if Fee Option 1 is selected, or annually if Fee Options 2, 3 or 4 are selected. Each party shall have the right to terminate this agreement upon written notice to the other party at least thirty (30) days prior to termination. Upon early termination, refunds shall not be given for partial monthly or annual fees.

Addendum E – Professional Services Agreement

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Professional Standards Administration Enforcement Agreement

Section 7 – Notices

Any modifications, amendments, or changes to the Agreement shall require appropriate notice to all parties. Notices shall be delivered to the following:

If to Oregon REALTORS®:

Oregon REALTORS®
ATTN: PROFESSIONAL STANDARDS ADMINISTRATOR
2110 MISSION ST SE, SUITE #230
SALEM, OR 97302

If to the Board:

_____ (Name of Board)

Attn: _____

_____ (Address)

_____

Section 8 – Execution

This Agreement shall be considered READ, UNDERSTOOD, and AGREED to by the parties.

_____ _____
Jenny Pakula, CEO Date
Oregon REALTORS®

Cindy Gentry 12/20/2022
Association Executive's Signature Date

Cindy Gentry
Print Name

Crystell Wise 12/20/2022
Board President's Signature Date

Crystell Wise
Print Name

2023 PSA Enforcement Agreement-August 2022