

**COLUMBIA SOCIETY OF  
REAL ESTATE  
APPRAISERS, INC.**

**MANUAL OF  
RESPONSIBILITIES  
AND PROCEDURES**

**OFFICERS, CHAIRPERSONS, AND  
EXECUTIVE SECRETARY**

## **PRESIDENT**

The President will preside at all meetings of the Society and will be an ex-officio member of all committees.

The President should be ever mindful of the goals and objectives of the Society and be prepared to the best of his ability to foster and preserve them.

It is the President's responsibility to keep the membership informed of all matters which affect the Society.

The President will appoint all committees and committee chairpersons, including the Executive Committee. The President should be ready at all times to assist them with all available Society facilities. The President will appoint committees as required. The standing committees are as follows:

1. Executive
2. Programs/Seminars - First Vice President, Chairman
3. Admissions - Second Vice President, Chairman
4. Publications - Third Vice President, Chairman
5. Career Development
6. Ethics
7. Education
8. Nominating
9. Scholarship

It is the responsibility of the President to oversee all committees and make sure they are performing their functions. The President will arrange and schedule all Board of Governor meetings.

The President should maintain close contact with the Executive Secretary and direct the performance of the Secretary's duties.

## **1ST VICE PRESIDENT**

In the absence, or inability, of the President to act, the 1st Vice President will perform the President's duties, and have all the powers and restrictions of the Presidency.

In addition, the 1st Vice President will be chairperson of the Programs/Seminars Committee.

The Programs/Seminars Committee is one of the most important committees within the society. It is the responsibility of this Committee to choose speakers, panels, topics and special projects for presentation at meetings and/or seminars. The Committee should also survey the members to ascertain areas of specialization which may be apropos for program presentation.

The Programs/Seminars Committee should work out a plan of responsibility concerned with speaker courtesy. Such formalities as introductions, letters of appreciation, gifts, and transportation should all be considered.

The Committee is responsible for determining how the program is presented, such as a lecture, a round-table workshop, a panel participation, a slide presentation, etc.

In arranging one-day seminars, the Programs/Seminars Committee should consider the educational aims of the Society. Selection of topics is an important initial task in this process, followed by outlining which markets will be best served through the presentations. A one day program might consist of several topics either related or unrelated. This type of mini conference can be quite effective.

The Committee should meet regularly and report periodically to the Society's Board of Governors. Some of the duties of this Committee will be to select seminar date, location, lecturer arrangements, publicity, registration, budget & finance, and materials for seminar participants.

The selection of a date requires consideration of market preferences (Saturday or weekday), the schedule of lecturers, availability of meeting facilities, and dates of other chapter activities already planned. Seminar location should have convenient access and parking, maximum degree of comfort for seminar lecturers and participants. Normally a major hotel, large motel or a university center will provide the most satisfactory facilities for a seminar.

A member of the Committee should be appointed to supervise the smooth operation of arrangements on the day of the seminar by checking the meeting room setup and availability of special equipment, seeing to other last minute needs of lecturers, confirm a luncheon count, etc.

## **2ND VICE PRESIDENT**

In the absence, or inability, of the 1st Vice President to act, the 2nd Vice President will perform the 1st Vice President's duties.

In addition, the 2nd Vice President will be chairperson of the Admissions Committee.

Admissions Committee:

Applications received by the Executive Secretary will be forwarded to Committee chairperson of the Admissions Committee for processing.

It will be the function of this committee to meet periodically to review and examine all applicants for membership in the Society.

The Admissions Committee will consist of the Second Vice President, who will serve as Chairperson of the Committee, and at least two other designated members of the Society. The Committee will interview each applicant as part of its review process.

Applicants applying for designations will be required to provide copies of at least five (5) samples of their recent appraisal reports during the interview phase. Said samples will conform to the Society's standards and to current USPAP guidelines.

When interviewing an applicant seeking Senior General designation, at least one member of the Committee must be a Senior General member of the Society and must hold a New York State Certified General appraiser license or the equivalent.

The Committee will decide if the applicant meets the criteria of the classification being applied for, and will report its findings to the Board of Governors in writing. Thereafter, the Board of Governors can grant membership to any applicant by a majority vote of the members present at any Board of Governors meeting.

The Committee Chairperson will make reasonable attempts to notify persons with incomplete applications, and will schedule interviews with applicants in a timely manner. Incomplete applications will be held by the Admissions Committee for a period of twelve months. Incomplete applications that are older than twelve months will be closed. Application fees are non refundable.

After processing by the Committee, records pertaining to all applicants will be returned to the Executive Secretary for safe keeping and to assist future committee chairpersons when the applicant applies for advancement.

Frequent meetings of the committee will be scheduled so as to avoid any undue delay which would reflect unfavorably on the Society. The 2nd Vice President will be a member of the Programs/Seminars Committee as preparation for chairing that committee in the future.

### **3RD VICE PRESIDENT**

In the absence, or inability, of the 2nd Vice President to act, the 3rd Vice President will perform the 2nd Vice President's duties.

In addition, the 3rd Vice President will be the Chairperson of the Publications Committee.

It will be the committee's function to submit publicity releases to newspapers, periodicals, trade publications, etc., in order that the public be acquainted with our meetings, our speakers, our educational programs and our objectives.

In addition, the 3rd Vice President is responsible for updating, from time to time, the Society's directory. In doing so, this Committee should produce a complete directory at the most economical cost to the Society.

Since the use of various mailing lists is the most frequently used method of bringing society programs to the attention of the public, creation and the maintenance of appropriate lists is of paramount importance. The primary source for these lists would be New York State Division of Licensing Services, but other lists can be considered, including appraisal organizations, lending institutions, utility companies, and real estate and professional organizations.

Further, the 3rd Vice President will be a member of the Admissions Committee as preparation for chairing that committee in the future.

## **SECRETARY**

It will be the duty of the Secretary to give notice of and attend all meetings of the Society and all Committee meetings as requested and to keep a record of their doings; to conduct all correspondence and to execute all orders, votes and resolutions not otherwise committed; to keep a list of the members of the Society; to notify the officers and members of the Society of their election; to notify members of their appointments on Committees; to furnish the Chairman of each Committee with a copy of the vote under which the Committee is appointed, and upon request, give notice of the meetings of the Committee; to prepare, under the direction of the Board of Governors, an annual report of the transactions and condition of the Society; and generally to make every effort to forward the business and advance the interests of the Society. In case of absence or disability of the Secretary, the Executive Committee may be appointed as Secretary pro tem. The Secretary will be the keeper of the Seal of the Society.

## **TREASURER**

The Treasurer will keep an account of all moneys received and expended for the use of the Society, and will make disbursements. The Treasurer will deposit all sums received in a Bank approved by the Executive Committee, and make a report at the annual meeting or when called upon by the President. Funds may be drawn only upon the signature of the Treasurer, President and the Executive Secretary. Two signatures are required on all checks. In the event of inability of the Treasurer to act, the Treasurer's duties will devolve upon the President.

The funds, books and vouchers in the Treasurer's hands will at all times be under the supervision of the Executive Committee and subject to its inspection and control. At the expiration of the Treasurer's term of office will deliver over to the new Treasurer all books, moneys, and other property, or, in the absence of the Treasurer-elect, to the President.

The Treasurer will maintain a close liaison with the Executive Secretary, and review monthly all income and expenditures.

The Treasurer will further be responsible for compiling an annual budget. The budget to be reviewed semiannually and a report submitted to the Board of Governors.

## **EXECUTIVE SECRETARY**

The Executive Secretary should maintain an office facility in his/her residence, or other suitable location, for the receipt of mail and phone messages and for the storage of records, supplies and equipment of the Society.

The Executive Secretary should attend all Board of Governors meetings, dinner meetings, and committee meetings as requested. He or she should assist the Secretary in preparation of minutes of Board of Governors and act as Secretary at various committee meetings as requested.

He or she should assist the Treasurer by the collection of dues, fees, and dinner meeting receipts and should assist in preparation of deposits, expense vouchers and payment of bills. The performance of these duties will act as a dual control over the financial function of the Society.

He or she should take charge of dinner meeting reservations, and make all arrangements for dinner meetings and other meetings as requested by the chairperson in charge of the Programs/Seminars Committee. This task includes preparing all meeting notices and arranging mailing services for the same.

The Executive Secretary should maintain records of all members on an up-to-date basis and should prepare revisions of the membership directory.

His/Her duties include performing all other tasks as directed by the Board of Governors, consistent with the day-to-day activities of a professional organization.

## **STANDING COMMITTEES**

### **ADMISSIONS COMMITTEE**

See 2nd Vice President

### **CAREER DEVELOPMENT COMMITTEE**

The Career Development Committee will consist of a Chairperson and members who are charged with the responsibility to further the interests of students and new members by assisting them in their careers and furthering their education.

#### **Scope of Responsibility**

It will be the responsibility of the Career Development Committee to stimulate the students and new members to become active members and to continue their education in the appraisal field. The area of responsibility should cover the following:

Encourage and solicit Society membership.

Develop and present a career development round-table discussion that will promote and encourage the free exchange of ideas, thinking, and appraisal interests at the general meetings.

Encourage attendance at Society courses, seminars and other appraisal society courses.  
Promote use of scholarship funds for qualified applicants for any of the above courses.

### **ETHICS COMMITTEE**

The Ethics Committee will consist of the chairperson and four members.

Any and all questions as to the professional acts of practice brought to the attention of this Committee must be acted upon in strict accordance to the Code of Ethics of the Society, Bylaws, and Uniform Standards of Professional Appraisal Practice (USPAP) which has been adopted by the Society. This Committee should maintain the highest standards regarding the professional status of the Society and should never let personal feelings influence its deliberations.

## **EDUCATION COMMITTEE**

### **Planning**

The Director of Education will be Chairman of the Education Committee, and the Committee should include other faculty members as selected by the Education Chairman. The Committee should meet periodically to review current educational programs and to discuss new ideas that can keep the Society current and competitive with other appraisal schools.

### **Programming**

The Committee should schedule educational programs in conjunction with Universities and other education affiliates, should arrange for space allocation of rooms, and should produce and provide mailing material describing appropriate course offerings.

### **Supervision**

It will be the responsibility of the Education Committee to insure that instructors are available for all classes. All printed materials for the students will be made available before the start of each program, and additional materials will be supplied as needed. The Committee should review attendance records for all classes, and should inspect classroom proceedings, cleanliness, audio equipment and visual aids.

### **Administration**

The Committee is responsible for preparing and grading student test papers. It should prepare class outlines and course curricula in conformance with New York State regulations. The Director (and/or Assistant Director) should confer with education affiliates to insure that applicants for courses are registered and tuition paid. Students should be informed of helpful publications available and the manner and use such publications. The Committee should prepare invoices to the Universities or other education affiliates for each course and should receive funds to be deposited in the Society's checking account.

### **Liaison**

When necessary, the Committee should arrange for meetings with the education affiliates concerning the operations of the Education Committee. The Committee should work closely with faculty members, education affiliate representatives, and other Society committees involved with education. The Committee should keep members abreast of any matters of interest regarding New York State Department of State, New York State Real Estate Appraisal Board, and the Appraisal Foundation, including new or proposed changes in appraiser licensing law and continuing education requirements.

## **NOMINATING COMMITTEE**

At least 60 days prior to the month of October, the President will appoint a Nominating Committee in accordance with the appropriate provisions of the By-Laws whose duty it will be to nominate candidates for Governors to be elected at the regular Society meeting in the month of November. They will notify the Secretary in writing at least twenty (20) days before the date of the election, of the names of such candidates. The Secretary will mail a copy thereof to the last recorded address of each member simultaneously with the notice of the election meeting.

Nominations for Governors may also be made, enclosed with the names of not less than twenty (20) members of the Society, if forwarded to the Secretary at least ten (10) days prior to the election meeting of the Society for transmittal by him to the members as provided in Article IX, Section 2. All names of the Governors will be placed in nomination by the Chairperson of the Nominating Committee at the annual meeting to be held in November.

The Nominating Committee can also recommend a slate of officers for the Board of Governors review, but the job of electing officers is the responsibility of the nine elected members of the Board. Elected members of the Board of Governors will elect officers at its next meeting following the election of Governors, but not later than 30 days after their election as Governors.

All duly elected officers will be installed at the January meeting of the Society.

## **PROGRAMS/SEMINARS COMMITTEE**

See 1st Vice President

## **PUBLICATIONS COMMITTEE**

See 3rd Vice President

## **SCHOLARSHIP COMMITTEE**

The prime responsibility for the function of the Scholarship Committee lies with the Scholarship Chairperson. The Committee is charged with the responsibility of promoting the proper use of scholarship funds when allocated by the Board of Governors. It will be the responsibility of the Committee to follow the guidelines as directed by the Board of Governors.

Scholarships to Columbia Courses & other Appraisal Society Courses: A letter is required from the applicant requesting the scholarship. A scholarship application form is mailed to the applicant. The Scholarship Committee chairperson reviews the application form, and either approves or disapproves it. The scholarship application form is forwarded to all members of the Committee for their approval or disapproval. Upon approval or disapproval of the committee, the Scholarship chairperson will write a letter to the applicant, with a copy to the Director of Education, advising of the committee's determination. Records of all correspondence will be forwarded to the Executive Secretary. Funds for scholarships will be disbursed by the Treasurer upon request of the Scholarship chairman.

University Scholarships: University scholarships are available for use toward real estate courses. The university should advise the Scholarship chairperson as to who received the award and what the basis for the award was. The amount of the scholarship will be established yearly by the Board of Governors.

The Scholarship chairperson can solicit universities that are not at present receiving scholarships. If a university indicates the desire for scholarship monies, then the matter should be taken up with the Scholarship Committee to determine whether or not an award should be made. Investigation at this time should include an analysis of the college curriculum, with emphasis on which courses the scholarships will be applied to.

After accepting or rejecting the application for scholarship, the Scholarship chairman should advise the University in writing as to the amount of the award and how it is to be disbursed. At the same time, a letter should be transmitted to the Treasurer requesting a check for the scholarship. Universities should be reminded that future scholarships will depend upon their advising us as to the disposition of the award.

Appraisal Course Award for Excellence: Upon recommendation of the Director of Education, awards may be made to students enrolled in the Society's appraisal courses. Funds for these awards will be disbursed by the Treasurer at the request of the Scholarship chairman.

### **Awards as Reviewed 4/26/2006 by R. Hoesch**

Joseph M. Pirog Award - one recipient, awarded annually, to a Hofstra Law School Student (this award was originally called the Howard T. Hogan award)

Robert A. Gregory Award - *Hofstra University for Business Studies* award redirected to CSA students as scholarships (tuition) to our highest marks in our residential and commercial courses.

Robert Rachlin Memorial Scholarship - two awards, to Hofstra University students

Nassau Community College - four awards, to Nassau Community College students

Queens College - three awards, to Queens College Recipients

## **DIRECTOR OF EDUCATION**

The Director of Education will act as a liaison with New York State Department of State, the Appraisal Foundation, and cooperating Universities and other education affiliates.

In conjunction with his Committee, the Director of Education will initiate, develop and maintain marketing programs for educational activities of the Society

He will conduct regularly scheduled meetings with the Education Committee to discuss instructor performance, materials to be distributed in class, proposed changes in curricula, testing procedures, etc.

He will consult with the chairman of the Scholarship Committee regarding class scholarships and awards.

He will coordinate with the Programs/Seminars Committee and Scholarship Committee to invite education affiliates to annual graduation meeting and to arrange for educational presentations, if any.

He will arrange for the preparation of educational brochures when necessary and will approve and assign all instructors for all courses.

## **ASSISTANT DIRECTOR OF EDUCATION**

The Assistant Director of Education will be aware of the duties of the Director of Education and be prepared to assume these duties when requested to do so by the Director of Education or the President of the Society

The Assistant Director of Education will chair the meeting of the Education Committee in the absence of the Director of Education

## **STATEN ISLAND COORDINATOR**

In cooperation with Staten Island Board of Realtors, the Staten Island Coordinator will develop a marketing program for qualifying courses and seminars to be offered in Staten Island. He will work with the designated person from the Staten Island Board of Realtors to assure that all courses and seminars are presented in an appropriate setting with comfortable classrooms, will coordinate the use of audio-visual equipment if needed, will collect attendance records and copy Director of Education/ Executive Secretary at the end of course, will bill Staten Island Board of Realtors and copy Director of Education/Executive Secretary at the end of course, etc.

## **CLASS COORDINATOR**

The person holding the position of Class Coordinator cannot hold a New York State appraiser license or a real estate salesperson/broker license. The Class Coordinator must attend a training session in Albany, NY, and thereafter be approved by New York State Department of State. There are specific requirements from Dept. Of State regarding real estate courses and appraiser courses, and they do not always correlate. Where requirements are specific to one category, that requirement is highlighted in “red” below.

The Class Coordinator’s responsibilities include:

1. Preparing applications (together with outlines submitted from teachers) for all courses, both qualifying and continuing education. This requirement applies to both categories.
2. Maintaining a current list of all teachers approved by New York State for both categories.
- 3.
4. Notifying New York State Department of State regarding those students who complete an approved course for **Real Estate** continuing education credit within 15 days of completion of course. List to include names, addresses and registration numbers of those students who successfully complete the course. Copies of communication to be kept in files for a period of three (3) years.
5. Periodically notifying the Department of State as to any instructor who teaches a course approved for **Real Estate** continuing education credit, if the instructor requests such. Copies of notifications should be kept in the files for a period of three (3) years. Instructors needing **Appraiser** continuing education credit should notify the State on Form DOS-1490 - Real Estate Appraiser Continuing Education Equivalency Education Credit Application. It is NOT the responsibility of the Class Coordinator to notify the State in this regard.
6. Issuing certificates of completion to any student successfully completing course. This requirement applies to both categories. Certificate to include name of school, name of course, hours and code #, student’s name, school seal, and signature signed in ink. No stamps or electronic signatures allowed.
7. Periodically requesting from New York State updated lists of New York State **Appraiser** license holders for mailing purposes.
8. Maintaining files for New York State Department of State for all courses taught by Columbia Society. Attendance sheets should also be kept for a period of two (2) years for **Appraiser** continuing education courses and five (5) years for **Appraiser** qualifying courses. Attendance sheets should be kept for a period of three (3) years for **Real Estate** continuing education courses..