

COLUMBIA SOCIETY OF REAL ESTATE APPRAISERS, INC.
MANUAL OF RESPONSIBILITIES AND PROCEDURES
OFFICERS, COMMITTEES, CHAIRPERSONS, AND EXECUTIVE SECRETARY

PRESIDENT

General Responsibilities

To assume the principal leadership role in promoting the objectives of the Society. Said objectives include but are not limited to promoting the educational and professional welfare of its members, promoting the recognition and value of the Society's designations, and enhancing the ability of members to do business. The President will continually evaluate the condition and needs of the Society and its members and will formulate and implement procedures to address the same.

Tasks

1. Upon taking office the President will familiarize himself with his/her duties and responsibilities and promptly proceed to undertake them with diligence.
2. The President will consult with the prior President and the Executive Secretary to obtain all records needed for the proper execution of his/her responsibilities.
3. The President will appoint an Executive Committee and serve as the Chairperson of said Committee.
4. The President at such time as he/she deems necessary will appoint Counsel for the Society.
5. The President at his/her sole discretion may appoint other such Committee Chairpersons as are required to meet the needs of or achieve the goals of the Society. These Committee Chairpersons may include but are not limited to:
 - a) Admissions
 - b) Publications
 - c) Ethics
 - d) Education
 - e) Nominating
 - f) Scholarship
 - g) Business Development
 - h) Audit
6. It is the responsibility of the President to oversee all Committees and make sure they are performing their functions. The President will give such direction to all of the Committee Chairpersons as he/she deems necessary and will communicate with them regularly to ensure that they are carrying out their assigned responsibilities. In the event that the President determines a Committee Chairperson is not fulfilling his/her responsibilities, the President will relieve him and appoint a replacement.
7. The President should be ready at all times to assist the Committee Chairpersons with all available Society facilities and resources.
8. The President will preside over all general membership and Board of Governors meetings of the

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Society and will be an ex-officio member of all Committees. Meetings shall be held in conformity with Robert's Rules of Order.

9. The President will call all Board of Governors meetings. The President will formulate the agenda for each Board of Governors meeting and will preside over the same. Meetings shall be held in conformity with Robert's Rules of Order.
10. It is the responsibility of the President to keep the other officers and the Board of Governors informed of all matters which may affect the Society.
11. The President should maintain close contact with the Executive Secretary and direct the performance of the Executive Secretary's duties.

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VICE PRESIDENT

General Responsibilities

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

The Vice President will act as Chairperson of the Programs/Seminars Committee, which is one of the most important Committees within the Society.

It is the responsibility of this Committee to develop programs, choose speakers, panels, topics and special projects for presentation at all meetings and seminars that qualify for continuing education or that provide a service for the membership.

The Committee is responsible for selecting seminar dates and locations; for making lecturer arrangements; and for publicity, registration, budget & finance, and selection/production of materials for seminar participants.

Tasks

1. Upon taking office the Vice President will familiarize himself with his/her duties and responsibilities and promptly proceed to undertake them with diligence.
2. The Vice President will consult with the prior Vice President and the Executive Secretary to obtain all records needed for the proper execution of his/her responsibilities.
3. He will select such persons as he/she deems necessary to serve on the Programs Committee. He/she should make such personnel changes from time to time as he/she feels are necessary to carry out his/her responsibilities. All members of the Committee serve at the discretion of the Chairperson.
4. He should familiarize himself with New York State Department of State requirements for the process of approving continuing education classes.
5. He should develop a series of programs/seminars that will qualify for New York State Department of State continuing education credits for presentation in conjunction with all the general membership meetings and at other locations. Said seminars must be developed far enough in advance to insure New York State Department of State approval before a seminar is given.
 - a) In arranging programs/seminars the Chairperson should consider the educational and/or service aims of the Society. Selection of topics is an important initial task in this process, as is 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.
 - b) Selection of dates is another important consideration and requires understanding of

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market preferences (Saturday or weekday), the schedule of lecturers, availability of meeting facilities, and dates of other chapter activities already planned so as not to conflict. Seminar location should have convenient access and parking as well as a maximum degree of comfort for seminar lecturers and participants. The Chairperson can consider if a restaurant, major hotel, large motel, fraternal hall, member's office or university center will provide the most satisfactory facilities for a seminar. The Chairperson will pick such location as he/she deems suitable and financially acceptable.

6. He should work directly with the Executive Secretary and Class Coordinator in getting the speaker, seminar and location approved in accordance with item #5 and #6 above.
7. He should consult with the President and keep the President informed of all proposals and plans made pursuant to items #4 and #5 above.
8. The Chairperson is responsible for determining how all programs are presented, such as by lecture, round-table workshops, panel participation, slide presentation, etc.
9. The Chairperson should always keep in mind speaker courtesy before, during, and after events. Such formalities as introductions, letters of appreciation, gifts, and transportation should all be considered.
10. The Chairperson will insure 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, confirming meal count, etc.
11. The Chairperson should survey the members to ascertain areas of specialization which may be apropos for program presentation and should follow each program by asking attendees to fill out evaluation forms to rate the effectiveness of the speaker, topic, and venue. The results of these survey forms should be compiled, analyzed, and forwarded to the Executive Secretary not later than one week after each seminar.
12. The Chairperson should report in writing at least the following to the Society's Board of Governors at each meeting.
 - a) The attendance and financial results of all events since the last Board of Governors meeting
 - b) The results of the surveys taken at each event given since the last Board of Governors meeting
 - c) The status of plans for upcoming seminars/programs

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SECRETARY

General Responsibilities

To make every effort to forward the business and advance the interests of the Society by keeping the official records and correspondence of the Society in a timely, accurate, and complete manner. In case of absence or disability of the Secretary, a member of the Executive Committee may be appointed as Secretary pro tem.

Tasks

1. Upon taking office the Secretary will familiarize himself with his/her duties and responsibilities and promptly proceed to undertake them with diligence.
2. Upon taking office the Secretary will consult with the prior Secretary and the Executive Secretary to obtain all records and forms needed for the proper execution of his/her responsibilities.
3. In all activities the Secretary will coordinate closely with the Executive Secretary of the Society and provide copies to the same as needed or requested.
4. The Secretary will attend all Board of Governors meetings and will take and prepare minutes of said meetings for distribution to the Board members. Minutes of the Board of Governors meetings should be sent to the Executive Secretary of the Society and circulated in a timely manner (no more than one week after the date of the meeting), and should include action items that various Board members have agreed to act on before the next Board meeting.
5. The Secretary will give notice of and attend all other meetings of the Society and all Committee meetings (as requested) and will keep a record of their doings.
6. The Secretary will conduct all correspondence and execute all orders, votes and resolutions not otherwise committed. Copies of the same will be forwarded to the Executive Secretary in a timely manner (no more than one week after the date of the action).
7. The Secretary will keep the official list of the members of the Society.
8. The Secretary will provide official notice to the officers and members of the Society of their election.
9. The Secretary will furnish the Chairperson of each Committee with a copy of the vote under which the Committee is appointed if done by vote, or by notice if appointed by the President.
10. The Secretary will coordinate with the Committee Chairpersons in order to provide official notice to members of their appointments on Committees.
11. The Secretary will develop and produce such letterheads, forms, records, and systems (electronic or paper) and needed to carry out his/her responsibilities.

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12. The Secretary will prepare, under the direction of the Board of Governors, an annual report of the transactions and condition of the Society.

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TREASURER

General Responsibilities

To keep an accurate and meaningful account of all moneys received and expended by the Society

To produce such financial management reports, from time to time, as other Officers and the Board of Governors may request

To manage the investment of Society funds. The Treasurer is responsible for compiling an annual budget, which should be reviewed semiannually and a report submitted to the Board of Governors at a regular meeting. The funds, books and vouchers of the Treasurer will at all times be under the supervision of the Executive Committee and subject to its inspection and control. In the event of inability of the Treasurer to act, the Treasurer's duties will devolve upon the President.

Tasks

1. Upon taking office the Treasurer will familiarize himself with his/her duties and responsibilities and promptly proceed to undertake them with diligence.
2. The Treasurer will consult with the prior Treasurer and the Executive Secretary to obtain all records and forms needed for the proper execution of his/her responsibilities. He/she will make whatever arrangements necessary to execute new bank documents to replace the prior treasurer's name with his/her name.
3. At the expiration of the Treasurer's term of office, he/she will deliver over to the new Treasurer all books, moneys, and other property, or, in the absence of the Treasurer elect, to the President. He/she will also cooperate in the execution of all required financial authorization documents.
4. Where appropriate and/or necessary the Treasurer will coordinate and maintain a close liaison with the Executive Secretary and will review monthly all income and expenditures.
5. The Treasurer, with the consent of the Board of Governors, may acquire, develop, modify or change whatever accounting systems he/she deems necessary to carry out his/her responsibilities.
6. The Treasurer will acquire, develop, modify or change such reports as necessary in order to provide meaningful financial management information to the Officers, Committee Chairpersons and Board of Governors as he/she deems necessary to carry out his/her responsibilities.
7. The Treasurer from time to time, with the consent of the Board of Governors, may open, change or terminate banking relationships as he/she deems prudent and in the best interest of the Society in carrying out his/her responsibilities.
8. The Treasurer from time to time, with the consent of the Board of Governors, may open, change or terminate credit card, merchant accounts or similar relationships as he/she deems prudent

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and in the best interest of the Society in carrying out his/her responsibilities.

9. The Treasurer from time to time, with the consent of the Board of Governors, may open, change or terminate Investment Company or similar relationships as he/she deems prudent and in the best interest of the Society in carrying out his/her responsibilities.
10. The Treasurer will deposit all sums received by the Society in a bank approved by the Board of Governors and maintain the records of such receipts and deposits.
11. The Treasurer will make or authorize all disbursements on behalf of the Society. Funds may be drawn only upon the signature of the Treasurer, President, and the Executive Secretary. Two signatures are required on all checks in excess of \$3,000.
12. The Treasurer will keep an account of all moneys received and expended for the use of the Society, following generally-accepted accounting principals
13. The Treasurer will prepare and submit all reports necessary on a timely basis to the Society's accountant for the filing of all required tax returns.
14. The Treasurer will make an annual financial report at the Annual meeting or interim financial reports when called upon by the President.
15. The Treasurer will submit to the Board of Governors quarterly Profit and Loss and Balance Sheet statements at the first meeting following the close of the quarter, except the meeting when the annual report is presented
16. The Treasurer will report to the Board of Governors all changes under items #5 through #9 above at the first meeting following such change.
17. The Treasurer will report to the Board of Governors any material change in the financial condition of the Society at the first meeting following such change.
18. The Treasurer will cooperate with and facilitate the activities and responsibilities of the Audit Committee.
19. Subsequent to Board approval, the Treasurer will review, negotiate, and execute contracts.

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EXECUTIVE SECRETARY

General Responsibilities

To support administratively the Officers and Board of Governors of the Society

To provide a repository for all records, including but not limited to communications, correspondence, minutes, procedures and financial records, so as to provide continuity for the operations of the Society, and to organize such.

To act as an advisor to the President on those matters pertaining to previously established procedures and precedents for the operation of the Society

To assist the President and officers of the Society in carrying out their responsibilities as necessary

Tasks

1. The Executive Secretary should maintain an office facility in his/her residence or other suitable location for the exercise of his/her responsibilities, which will include the specific tasks of the receipt of mail and phone messages and for the storage of records, supplies and equipment of the Society.
2. The Executive Secretary should attend all Board of Governors meetings, general membership meetings, dinner meetings, and committee meetings as requested. He/she should assist the Secretary in preparation of minutes of Board of Governors meetings, general membership meetings, and other official correspondence, as well as acting as Secretary at various committee meetings as requested.
3. He/she should assist the Treasurer by the collection of membership dues, application and advancement fees, seminar fees and dinner meeting fees, as well as assisting in preparation of deposits, expense vouchers and payment of bills. The Executive Secretary will provide such reports of these activities, in a time and manner as directed by and acceptable to the Treasurer. He/she will execute all contracts at the direction of the Treasurer. The performance of these duties will act as a dual control over the financial function of the Society.
4. He/she will be responsible for making and taking reservations and related arrangements for general membership meetings, dinner meetings, Board of Governors meetings, and other meetings as requested by the Vice President or person in charge of that particular program or event. This task includes preparing all meeting notices and arranging mailing (electronic or conventional) services for the same.
5. The Executive Secretary will receive and forward all membership applications and related correspondence to the Membership Chairperson. He/she will forward to the appropriate person any other correspondence received by the Society.
6. Receive and forward to the appropriate person all correspondence received by the Society

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7. Maintain records of all members on an up-to-date basis and prepare revisions of the membership directory
8. Develop and maintain mailing lists for all Society events and publications
9. Work with the webmaster to maintain and update the Society website to reflect the current status of all matters reported on the same
10. Support and assist the Vice President and Class Coordinator in getting continuing education programs approved by New York State Department of State
11. Support and assist the Director of Education in getting qualifying programs approved by New York State Department of State
12. His/her duties include performing all other tasks as directed by the President or by the Board of Governors consistent with the day-to-day activities of a professional organization.

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STANDING COMMITTEES

EXECUTIVE COMMITTEE AND CHAIRPERSON

General Responsibilities

To assist and advise the President in carrying out his/her responsibilities

Tasks

1. The President will be the Chairperson of this Committee.
2. The Committee shall consist of the Vice President and any other members in good standing of the Society which the President chooses. All members other than the Vice President serve at the discretion of the President.
3. The members of the Executive Committee will carry out such assignments as given to them by the President.

PROGRAMS/SEMINARS COMMITTEE AND CHAIRPERSON

See **VICE PRESIDENT**

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ADMISSIONS COMMITTEE AND CHAIRPERSON

General Responsibilities

The Admissions Committee will determine whether those persons applying for membership or advancement in the Society meet the qualifications and standards for the category of membership they are applying for or aspiring to.

The Committee will meet periodically to review and examine all applicants (except student applicants) for membership in the Society. Frequent meetings of the Committee will be scheduled so as to avoid any undue delay which would reflect unfavorably on the Society.

Tasks

1. The Committee will process all membership applications forwarded by the Executive Secretary to the Committee Chairperson.
2. Upon receipt of an application, the Committee chairperson will contact the applicant and make arrangements to receive the documentation applicable to the membership category he/she is applying for. Documentation should include at least five (5) sample copies of applicant's recent appraisal reports in electronic format if applicant is applying for designation or advancement to designated status.
3. Upon receipt and review and approval of the required documentation, the Chairperson will arrange a time and place for the Committee to interview the applicant.
4. The Committee will consist of a Chairperson and at least two other designated members of the Society. The Committee will interview each and every applicant as part of its applicant review process. When interviewing an applicant seeking designation, at least one member of the Committee must have the same designation as that sought by the applicant and must hold a New York State appraiser certification in that category.
5. The Chairperson may select Committee members on a standing or ad-hoc basis as he/she sees fit. Members serve at the discretion of the Chairperson.
6. The Chairperson will determine and develop the procedures for conducting interviews, will seek to apply them consistently, and will advise the Committee members of the same.
7. These procedures will be reduced to writing and transmitted to the Executive Secretary.
8. The Committee will decide by vote if the applicant meets the criteria of the classification being applied for, and the Chairperson will report the findings of the Committee 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.
9. 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

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applicant applies for advancement.

10. 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 Committee Chairperson for a period of twelve months, and thereafter will be closed. Application fees are non refundable.

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ETHICS COMMITTEE AND CHAIRPERSON

General Responsibilities

To advise the Officers and Board of Governors on all matters pertaining to the ethical conduct of the members of the Society

To investigate matters referred to the Committee and to make recommendations to the Board of Governors as to the proper disposition resulting from said investigations

All questions as to professional acts of practice brought to the attention of this Committee must be acted upon in accordance with the Code of Ethics of the Society, Bylaws, and Uniform Standards of Professional Appraisal Practice (USPAP) which has been adopted by the Society.

The Committee should maintain the highest standards regarding the professional status of the Society and should never let personal feelings influence its deliberations.

Tasks

1. The Ethics Committee will consist of a Chairperson and up to four members.
2. The Chairperson may select Committee members on a standing or ad-hoc basis as he/she sees fit. Members serve at the discretion of the Chairperson.
3. The Chairperson will determine and develop the procedures for dealing with matters brought before the Committee, will seek to apply them on consistent basis, and will advise the Committee members of the same.
4. These procedures will be reduced to writing and transmitted to the Executive Secretary.
5. The Committee will investigate promptly and thoroughly all matters referred by the Board of Governors relating to alleged breaches of the Society Code of Ethics or the Uniform Standards of Professional Appraisal Practice.

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EDUCATION COMMITTEE AND CHAIRPERSON

General Responsibilities

To develop, implement and market all appraiser pre-licensing and other education programs, with the exception of continuing education seminars

To continually review the Society's educational programs and discuss new ideas for educational programs that can keep the Society current and competitive with other sources and types of appraisal education

To act as a liaison with New York State Department of State, the Appraisal Foundation, and cooperating universities and other education affiliates.

Tasks

1. The Committee will consist of the Director of Education, who will be Chairperson of the Education Committee, the Staten Island Coordinator and the Class Coordinator. The Committee should also include other faculty members as selected by the Director of Education. Members serve at the discretion of the Chairperson.
2. The Committee Chairperson will select and recommend to the Board of Governors for their approval those persons to hold the positions of Staten Island Coordinator and Class Coordinator. The Chairperson at his/her discretion may recommend removal of any of the above to the Board of Governors.
3. The Committee Chairperson will supervise and coordinate the activities of the Regional (i.e. Staten Island) Coordinators.
4. The Committee should develop and schedule appraiser qualifying educational programs in conjunction with Universities and other education affiliates, should arrange for space allocation of rooms, and should produce and provide promotional and mailing material describing appropriate course offerings.
5. The Chairperson should confer with education affiliates to insure that applicants for courses are registered and tuition paid and that students are informed of helpful publications available and the manner and use such publications.
6. The Chairperson should forward enrollment information to the Executive Secretary and Treasurer so that the Executive Secretary may prepare invoices to the universities or other education affiliates.
7. The Education Committee will recruit and develop qualified instructors from within the Society so as to insure that sufficient instructors are available for all classes.
8. The Chairperson will approve and assign all instructors for all courses. All instructors serve at the discretion of the Chairperson.

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9. The Committee will select and develop all course-related instructional materials.
10. The Committee will prepare class outlines and course curricula in conformance with New York State regulations
11. The Committee will insure that required instructional materials for the students will be made available before the start of each program and that additional materials will be supplied as needed.
12. The Committee is responsible for preparing and grading student test papers. All Society-developed tests must be approved by the Chairperson.
13. The Chairperson should review attendance records for all classes, and Committee members should inspect classroom proceedings, cleanliness, audio equipment and visual aids.
14. The Chairperson will conduct regularly-scheduled meetings (in person or electronically) with the Education Committee to discuss instructor performance, materials to be distributed in class, proposed changes in curricula, testing procedures, etc.
15. When necessary, the Chairperson should arrange for meetings with the education affiliates concerning the operations of the Committee. The Committee should work closely with faculty members, education affiliate representatives, and other Society committees involved with education. The Chairperson should keep the Board of Governors and 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.
16. The Chairperson will consult with the chairperson of the Scholarship Committee regarding class scholarships and awards.
17. The Chairperson will coordinate with the Vice President (Programs/Seminars Committee) and Scholarship Committee to invite education affiliates to annual graduation meeting and to arrange for educational presentations, if any.

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Regional Coordinators (i.e. Staten Island)

- a) Regional Coordinators work under the direction of the Director of Education.
- b) Develop in cooperation with the regional classroom provider (i.e. Staten Island Board of Realtors) a marketing program for qualifying courses and seminars to be offered in Staten Island.
- c) Work with the designated person from the regional classroom provider (i.e. Staten Island Board of Realtors) to assure appropriate course offerings and scheduling and to insure that all courses and seminars are presented in an appropriate setting with comfortable classrooms and with audio-visual equipment if needed.
- d) Collect attendance records and copy Director of Education and Executive Secretary at the end of course, bill regional classroom provider (i.e. Staten Island Board of Realtors) and copy Director of Education, Treasurer and Executive Secretary at the end of course.

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Class Coordinator

- a) Class Coordinator serves as a liaison between the Society and the New York State Department of State. He/she reports to the Executive Secretary. His duties include:
- b) Preparing applications (together with outlines submitted from teachers) for Appraiser Continuing Education Course Approval (and Renewal), Appraiser Qualifying Course Approval (and Renewal), Real Estate Continuing Education Course Approval (and Renewal), etc.
- c) Maintaining a current list of all teachers approved by New York State as Real Estate Appraiser Instructors and/or Real Estate Instructors.
- d) 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. (Section 177.8 of the law mandates that the Department of State be furnished a list of 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.
- e) Periodically notifying the Department of State as to any instructor who teaches a course approved for real estate continuing education credit, if the instructor needs real estate continuing education credit. Copies of notifications should be kept in the files for a period of three (3) years.
- f) Note: It is not the responsibility of the Class Coordinator to notify the Department of State regarding instructors needing appraiser continuing education credit for courses taught. The instructor should notify the State on Form DOS-1490 - Real Estate Appraiser Continuing Education Equivalency Education Credit Application - if he needs appraiser continuing education credit for courses taught.
- g) Issuing certificates of completion to any student successfully completing an appraisal course (qualifying or continuing education) or real estate course (continuing education). Certificate to include name of school, name of course, hours and code #, student's name, school seal, and signature signed in ink.
- h) Periodically requesting from New York State updated lists of New York State appraiser license holders for mailing purposes.
- i) Maintaining files for New York State Department of State for a period of 3 years for real estate continuing education courses and 2 years for appraiser continuing education courses (5 years for appraiser qualifying courses) for all courses taught by Columbia Society. Files to include approval number issued by the Department for the course; the offering, title and description of the course; the dates and hours the course was given; and the names of the persons who took the course and whether they passed or failed. Attendance sheets should also be kept for a period of 3 years for real estate continuing education courses and 2 years for appraiser continuing education courses (5 years for appraiser qualifying courses), as well as communications with

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the Department of State as listed in Section c) and Section d) above.

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SCHOLARSHIP COMMITTEE AND CHAIRPERSON

General Responsibilities

To develop and execute a scholarship program that benefits the Society.

To promote the proper use of scholarship funds when allocated by the Board of Governors pursuant to the guidelines set forth by the Board of Governors.

Tasks

1. The Scholarship Committee will consist of a Chairperson and such other Society members chosen by the Chairperson. Members may be chosen on a standing or ad-hoc basis as the Chairperson desires. Such members will serve at the discretion of the Chairperson.
2. The Chairperson will determine and develop the procedures for awarding scholarships, will seek to apply them on consistent basis, and will advise the Committee members of the same. A copy of said procedures will be sent to the Executive Secretary.
3. In addition to those scholarship funds awarded from the general operating funds of the Society, the Chairperson will have jurisdiction over those scholarships awarded from the Society's scholarship fund.
4. The Chairperson will develop and recommend to the Board of Governors scholarship programs and guidelines for the same and will execute them if and when approved.
5. Scholarship funds must be appropriated each year. Availability is based on the financial means of the Society. The Chairperson should consult with the Treasurer prior to making any recommendations for awards to the Board of Governors.
6. 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.
7. After acceptance or rejection of the application for scholarship by the Board of Governors, the Chairperson 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.

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BUSINESS DEVELOPMENT COMMITTEE AND CHAIRPERSON

General Responsibilities

To engage in those activities which will generate membership for the Society, and which will promote recognition for and value of the Society's designations and will enhance members' ability to do business.

Tasks

1. The Business Development Committee will consist of a Chairperson and such members as the Chairperson selects.
2. The Chairperson may select Committee members on a standing or ad-hoc basis as he sees fit. Members serve at the discretion of the Chairperson.
3. The Committee will formulate, develop and implement those programs which fulfill the responsibilities of their Committee.
4. The Committee will coordinate as needed with the Vice President, the Treasurer and the Executive Secretary.

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NOMINATING COMMITTEE AND CHAIRPERSON

General Responsibilities

To nominate candidates (other than those presently serving on the Nominating Committee) for Governors to be elected at the next election

To recommend a slate of officers for the Board of Governors review if so requested

Tasks

1. At least 60 days prior to the month of October, the President will appoint a Nominating Committee whose duty it will be to nominate candidates for Governors to be elected at the regular Society meeting in the month of November
2. The Committee will consist of a Chairperson, who is the immediate Past President of the Society, and four additional members appointed by the Committee Chairperson. All members must be designated members of the Society in good standing. Of the four members selected, two must be elected members of the Board of Governors.
3. The Chairperson 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.
4. 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.

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ADVERTISING COORDINATOR

General Responsibilities

To develop successful and sustained advertising programs for all Society media and events. The goal of these programs is to make a material financial contribution to the Society.

Tasks

1. Formulate a prospect list of possible advertisers/sponsors that sell products and services to appraisers and other readers of our communications and or attendees at our functions
2. Contact potential advertisers/sponsors by phone, email and in person to solicit ads and or sponsorships from them for specific publications and/or events
3. Maintain a list of prospects/potential. List should have:
 - a) Company name, contact name, position, mailing address, phone #, email address, and fax #, and type of business
 - b) Share list with Executive Secretary/Editor
4. Maintain a contact history with prospects/potential advertisers with appropriate notes and follow up reminders. History should indicate:
 - a) Reaction to solicitation
 - b) Type of advertising/sponsorship they are interested in
 - c) Notes as to their needs
 - d) Placement/purchase history (what they bought, what they paid, when they bought)
5. Maintain and act upon a follow-up calendar in order to close sales on a timely basis.
6. Recommend to advertisers the type and size of ads that can be in the publication
7. Recommend to advertisers the type of sponsorship that is available and can work for them
8. Close the sale and make sure all copy and payment is submitted on a timely basis
9. Help with billing, if requested
10. Participate with Executive Secretary and Publications Chair in designing rate sheets and ad sizes and types, as well as decisions as to related composition, frequency of publication and publication dates.
11. Design and produce marketing and sales materials, including phone scripts and e-mail templates, to support solicitations from potential advertisers/sponsors in cooperation with Executive Secretary.
12. Provide regular feedback on the type of ads, sponsorships and promotional opportunities that prospects would like to see or have.

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13. Maintain billing records as related to your compensation, and regularly bill Columbia Society for amount Society owes Ad Coordinator
14. Provide information promptly in operational area when requested by either the President, Vice President (Publication Chair), Treasurer and Executive Secretary.
15. Prepare an annual written report to the Board on all activities in your operational area.

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MEMBERSHIP DIRECTOR

General Responsibilities

To continually recruit qualified new members into the Society and to develop all programs, materials and administrative tools necessary to achieve this objective.

Tasks

1. Educate yourself completely on the following so as to be an effective Membership Director:
 - a) The benefits of Society membership
 - b) History of the Society
 - c) Current organization and working of the Society
2. Identify potential target groups/markets whose members would be interested in and/or benefit from Society membership.
3. Communicate directly with those groups and their members as to the benefits of membership in the Society.
4. Develop and produce marketing material in coordination with the Executive Secretary to support all aspect of membership development, to include but not limited to:
 - a) Printed hand-out and direct mail material
 - b) E-mail material and templates
 - c) Personal solicitation scripts and talking points
 - d) Phone scripts and talking points
 - e) Organizational presentations
 - f) Power point presentations
5. Make personal visits and solicitations to prospect groups and organizations, such as:
 - a) Real estate offices
 - b) Appraisal offices
 - c) Mortgage lending company offices
 - d) Trade groups
 - e) Professional organizations.
6. Go to and use trade groups, professional organizations and networking events for the purpose of making contacts that will facilitate membership development and solicitation.
7. Recruit as necessary other Society members to help you make introductions to
 - a) Companies
 - b) Professional organizations
 - c) Colleagues who are not members
8. Attend all Society seminars and events for the purpose of making personal contact with each non-member attending these events. The purpose of this direct contact is to:
 - a) Familiarize them with the Society
 - b) Point out the benefits of joining the Society
 - c) Motivate them to complete and submit an application

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9. Find out in advance of Society events, from the Executive Secretary, who are the non-members who are attending so you can socialize with them at the event to promote Society membership.
10. Coordinate with Executive Secretary for forwarding of contact info collected from visitors to website.
11. Develop a prospect list of potential members from such sources as:
 - a) Visitors to web site
 - b) Non-member attendees at seminars and events
 - c) Group presentations.
 - d) Networking events
 - e) Referrals from members
 - f) Targeted organization membership lists
 - g) Other Society members
12. Maintain a list of prospects/potential members. List should have:
 - a) Company name, contact name, position, mailing address, phone #, email address, fax #
 - b) Share list with Executive Secretary
13. Make phone, e-mail and/or personal contact with those persons on your prospect list for the purpose of encouraging them to make an application to join the Society
14. Maintain a contact history with prospects/potential members with appropriate notes and follow-up reminders. History should indicate at least the following:
 - a) Source of lead
 - b) Reaction to solicitation
 - c) Degree of interest in joining
 - d) Current application/ membership status
 - e) Membership committee results
 - f) Follow up on membership renewals.
15. Recruit as needed other persons for membership development, with the advice and consent of the President and Executive Secretary
16. Train other persons recruited for membership development.
17. Train their replacements at such time as they choose to give up the job
18. Maintain your own commission records and submit bill to the Executive Secretary
19. Consult with Admissions Chair regarding the status of applications submitted and the quality of candidates being solicited. Aid Admissions Committee in collecting paperwork needed, including reference letters and sample reports. Help interview applicants, if needed.