



Policy Manual

Revised Effective 7/28/2022

Policy Manual

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Additional Policies

REALTOR® Fair Housing Policy	Published Separately
Financial Policy.....	Published Separately
Personnel Handbook.....	Published Separately
Anti-Harassment Policy	Published Separately
Political Policies.....	Published Separately

Policies Regarding Actions by Members at SAR Facilities

No one shall be permitted to distribute, promote, circulate or gather signatures on any petition of any nature related to any ballot measure or any act of any governmental body on the premises of the Sacramento Association of REALTORS® unless the Board of Directors has previously endorsed the ballot measure or act of the governmental body.

Candidates for political office, commissions, boards or other elected positions shall be interviewed at the discretion of the SAR Local Candidate Recommendation Committee. While actively seeking office, candidates will not serve as presenters, guests or interviewees at any other SAR meeting, event or forum, unless endorsed by the SAR Local Candidate Recommendation Committee.

While serving in an elected office, individuals may be invited to speak or participate in SAR meetings, events or forums. In such instances, the SAR Chairperson will notify the Government Relations Department so staff can extend an invitation and coordinate the details with the elected official or their staff.

Actively recruiting agents is not permitted at the Association's Headquarters or at meetings, events or classes sponsored by the Association.

Budgetary Policies

Upon request, Members or spouses of Members of the National Guard or Reserve Component who are called to active duty in service to the country shall have their SAR dues waived for the full year(s) during which they are serving.
03/24/11

The SAR President shall review and initial the following financial activities of the Chief Executive Officer on a monthly basis: Expense Reports, Credit Card Purchases, and Time Allocation Sheets. In the Presidents absence the President Elect will review material. *03/27/08*

SAR will invest in an NAR Golden R in 2005 and purchase annual updates.
9/29/05

Set aside \$250,000 as an Operating Fund in the event that Membership drops 10% or more in one year. *1/20/05*

Increase the SAR reserves for operating expenses from six months to one year.
3/25/04

Publications Policies

Approve an editorial policy for SAR News as follows:

The Sacramento Association of REALTORS® (SAR) welcomes articles of educational interest to its Members. Published articles will feature the author's name, title and company. However, no direct compensation will be paid to the author. SAR reserves the right to edit submitted articles for length, grammar, and appropriateness.

Articles will be printed in SAR's publications on a space available basis.

Attempts will be made to publish submitted articles in a timely manner. However, submission of an article does not guarantee when, or if, it will be published.

Professional Standards Policies

Approve the C.A.R. Citation System.

Approve the rewritten Regional Professional Standards Agreement between SAR, EDCAR and YAR.

Ratify the proposed amendment to the SAR retention policy for Professional Standards as follows: Ethics cases: Three (3) years beginning on the date the decision is final with the association. Arbitration Cases: Five (5) years beginning on the date the award is final with the association.

Charge a \$100 fee on all Professional Standards hearing continuances.

Adopt the CAR Arbitration Professional Standards Manual effective October 1, 1998, as amended from time to time.

Increase the Arbitration Fee from \$150 to \$250.

Fundraising Policy

Although the SAR BOD voted to remove the Fundraising Policy at its August 2022 meeting. There may be a need for a general policy to achieve a cohesive calendar of SAR Meetings and Events.

The following SAR entities are permitted to host fundraisers:

CanTree Committee, Government Relations Committee, Local Candidate Recommendation Committee, Leadership Academy, Masters Club, SAR Charitable Foundation, SAR Scholarship Foundation Trust, and Young Professionals Network Committee.

These SAR entities must follow the following guidelines for its fundraisers:

1. Charitable Fundraisers must benefit an approved 501c (3) organization of the SAR Charitable Foundation, the SAR Scholarship Trust Foundation, or the REALTOR® Action Fund.
2. Fundraisers may not be scheduled within three (3) weeks of one another, whether onsite or offsite. This will be controlled and monitored by SAR Staff. An annual calendar planning session will convene in the last quarter of the year, including representation from each committee.
3. New fundraisers that are not included in the current budget, must be requested at least 4 months prior to its event date to the Strategic Planning and Finance Committee, where they may choose to recommend approval to the SAR Board of Directors.
4. All events must have a detailed budget that projects goals for revenue and limits on expenses. The SAR staff liaison will be responsible for ensuring the entity stays within the budget. The template for creating a budget for a new event can be requested from an SAR staff member.
5. To keep fundraisers from being cancelled, 100% of its budgeted expenses must be covered by its collected revenue at least 1 week prior to its event date for events held at SAR. For fundraisers held offsite, funds must be collected by the date stated on the contract with the venue that allows for a full refund/credit.
6. Each entity cannot exceed two (2) fundraising events per calendar year.

Education Policy

General Provisions

Maximize the scheduling of income producing programs such as RETI, BTI and CRS. Make sponsorships available for courses and programs as available and appropriate.

SAR members will not be compensated when instructing as volunteers for SAR developed courses such as RETI or BTI. SAR is not prohibited from compensating members who develop and present courses of the type for which SAR would compensate non-member instructors.

Registration

Students registering at least 48 hours prior to the scheduled time for the class will be admitted at the advertised fee. To be a valid registration the student must have paid the entire fee prior to the registration deadline.

Registration for all classes is on a first-come-first-served basis based on class size availability. Students attempting to register after a class is full but prior to the registration cutoff date will be placed on a standby list in the sequence in which the registration is received and will be admitted to the class as space becomes available without payment of a late registration fee.

Fees

Fees for SAR education courses shall be established to net SAR at least \$10 per student after all associated hard costs such as speaker fees, food, beverages and handouts have been recovered.

All students, including ECC holders, failing to register before the deadline will need to pay a \$10 late registration fee. Late registering students will be placed on a waiting list in the sequence in which the registration is received and will receive classroom access, class handouts, food and other student items after all registered students have been served and in the order their name appears on the waiting list.

Cancellations

Students cancelling a registration prior to the normal cancellation deadline will receive a full refund except in cases in which an earlier registration deadline is noticed in the registration materials based upon a contractual commitment with the instructor or other parties.

Cancellation of a class after the cancellation deadline or failure to attend without cancelling will result in forfeiture of all fees paid. This provision may be waived in the event of a bona fide emergency such as a sudden medical matter or the death of an immediate family member.

SAR reserves the right to cancel any class at or prior to the registration deadline if registered student counts are not sufficient to meet instructor requirements, cover costs or for other valid reasons. SAR also reserves the right to cancel a class at the last minute due to circumstances beyond the control of SAR such as the instructor not being able to present the class or not being able to access the scheduled facility. If SAR cancels the class all registered students will receive a full refund.

Education Club Card (ECC)

The Education Committee has established the ECC to increase training and attendance at seminars. The Education Club card works as follows:

There are three tiers of discounts based on the price members pay for the card.

Tier I (Cost \$50 = 25% Off)

Tier II (Cost \$100 = 50% Off)

Tier III (Cost \$200 = 75% Off)

- The card will be available to all active REALTORS® and SAR Affiliate Members on an individual basis, one card per person is required, no sharing of the card is permitted.
- Registration can now be done online
- The card is valid for 365 days from the date of purchase.
- The only exclusions from the ECC discount program are designations, certifications and any outside educational offerings that are not presented by the SAR Education Committee.

New Member Discount

All new SAR members shall receive a 25% discount from the series price if they take the RETI during the first cycle after they join SAR. The SAR Education Committee is to establish qualifying dates for each year.

Internship Class Attendance Policy

SAR interns will be entitled to attend SAR meetings, forums, classes and events presented during the time they are both enrolled in the community college and actively participating in the SAR Internship Program in accordance with the following procedures.

1. Interns will be able to attend meetings, forums, classes and events that are offered without cost to the general REALTOR® membership.
2. Interns will be able to attend classes and events offered by the SAR Education Committee at a standard fee of \$35 or less at no cost to the Intern. Standard fee as used in this policy means the fee charged to REALTORS® and SAR Affiliate Members.
3. Interns will be able to attend classes and events offered by SAR Education Committee at a standard fee in excess of \$35 at a discount of 50% from the standard fee.
4. Interns will be able to attend RETI and BTI classes at a 50% discount from the standard fee, regardless of whether they are attending individual classes or registering for the entire series. This policy does not apply to designation or certification courses.
5. Interns will be charged the standard fee for attending any classes and events not offered by the SAR Education Department.
6. Interns must comply with any advance registration requirements for the class or event being attended.

SAR Education Department ACE Award Policy

Purpose:

To recognize SAR Members who have met the approved education class criteria listed below.

Mission Statement:

The SAR ACE Award recognizes SAR Members who are dedicated to perfecting their knowledge and skills by taking advantage of classes at SAR.

- Award winners are acknowledged for their commitment to go "above and beyond" in looking after their clients' needs through the continual pursuit of educational excellence. Driven to learn and grow, ACE Award recipients stand-out from the crowd.
- We believe that education develops opportunities that yield success for the practitioner as well as the clients served. The SAR ACE Award recognizes those who make learning a priority on their way to achievement.

Eligibility:

Applicant must be a current REALTOR® or Affiliate member in "good standing" with the Sacramento Association of REALTORS®. Good standing means a member who is in compliance with all provisions of the SAR Administrative Screening Policy.

Criteria for Approval:

For initial approval: Attend 10 education classes sponsored by the SAR Education Committee.

For annual renewal: Attend 6 education classes sponsored by the SAR Education Committee.

Registration must be conducted directly with the SAR Education Department.

Applicants are required to attend the full duration of each class. This will be validated by procedures established by the SAR Education Committee.

Classes included:

Classes hosted by the SAR Education Committee, Masters Club, SAR Commercial Council and any other SAR Committee through which attendees will be recorded into the SAR database. Certification and Designation Courses offered via SAR are included.

Classes Excluded:

Classes not hosted by SAR, including those hosted by WCR, NAHREP, AREA, or any other organization whose students do not register through SAR, even though the class occurs at SAR facilities.

Use of Logo and Advertising:

Use of ACE Award logo is restricted to SAR members who remain in good standing with the Association. Only the year in which the ACE Award was given may be advertised, and only the ACE Award logo with the appropriate award year may be used.

Recognition of Award winners:

- Permission to use the "SAR ACE Award" name and logo for advertising and branding.
- A PDF Certificate shall be emailed to the Award Winner.
- Mention at the February Main Meeting.
- Award winners will be mentioned in the February SAR newsletter under the "List of ACE Award Recipients."
- Plaque & Pin Options - Paid for by the award winner if they choose this option.
- Once the program has gained traction, it will have its own awards ceremony/dinner that will have sponsors and a dynamic keynote speaker.

Preparation of Application:

- Students apply via the ACE Award Application that will be developed, maintained and modified as necessary by the SAR Education Committee.

Qualification Period and Application Deadline:

The qualification period begins January 1st each year.

The deadline for applying is 4:30pm on the first Friday of the following year. No applications will be accepted after this date.

Recognition to be given at the SAR Main Meeting in February each year.

Cost to Members:

No fee to SAR ACE Award Recipients unless they specifically elect to participate in related optional fee programs.

SAR Technology Policy

Please refer to the Technology Policy contained within the SAR Personnel Handbook.

Member Information Privacy Policy

The Sacramento Association of REALTORS® (SAR) provides this policy to demonstrate our commitment to the privacy of our members and to make you aware of the uses made of your member information by SAR.

1. **Confidential.** In general, all member information provided to SAR by their members is treated as confidential and SAR uses their best efforts to keep such information confidential and prevent unauthorized use. Except for the limited situations described in this policy, SAR will not use your member information for any purpose without your consent. In addition, we do not provide any information pertaining to: racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership or information concerning the sexual orientation or marital status of any individual.
2. **SAR Member Communications.** From time to time, SAR will use your preferred contact information to send you membership communications and publications. For example, members of SAR receive a monthly newsletter and we will need to access and use your preferred mailing address to send you this publication. "Preferred contact information" as used in this section and the remainder of the privacy policy is the information pertaining to your name, email address, preferred mailing address, telephone and facsimile numbers which you indicated to SAR is your preferred contact information to receive communications.
3. **Member Requests.** You may contact SAR and make requests. In order to respond to your request, we may need to access and use your member information. For example, we may need to access your preferred mailing address to send you the information you requested.
4. **Membership Directory.** As one of the benefits of membership with SAR we make available on our web site (www.sacrealtor.org) a searchable database of our members called the "Membership Directory." The purpose of this directory is to assist the public in locating and contacting our members. The member information made available through the Membership Directory is intended to contain only the business contact information of our members. Under no circumstances will we intentionally display or make available your personal home address or telephone number in the Membership Directory. If you would like to be removed from the Membership Directory, please see section 9 of the privacy policy, "Choice/Opting Out." If you have corrections or updates to the directory, please see section 10, "Corrections/Updates."

5. **Names of Directors and Committee Members; Use of Business Contact Information.** For use by SAR members and for purposes of conducting SAR Board of Directors meetings, we make available on our web site and in other print and electronic formats the names of those members serving as directors or committee members of SAR. In addition, in order to provide meeting related information and to send official notices, we access and use the business contact information of SAR directors and committee members, including email and business mailing addresses.
6. **Third Parties.** From time to time, SAR makes your business contact information available to approved companies to enable them to notify you about products and services. Under no circumstances will we intentionally display or make available your personal home addresses or telephone number to third parties. If you do not want your business contact information to be provided to third parties, please see section 9 of this privacy policy, "Choice/Opting Out."
7. **Request from the Public.** If the public contacts SAR and requests information regarding one of our members, we may check our member database and verify to the public whether the person(s) is in fact a member of SAR. We may also provide the public with the name and telephone number of the firm with whom the member is affiliated. However, in no event will we provide personal information to the public unless required by a subpoena, search warrant or other legal process or in case of imminent physical harm to the public or other members.
8. **Orders/Credit Card Information.** SAR sells various real estate related products and services to its members. In order to process and complete orders, we may need to access your member information. This information will only be used to process your order. If you pay for your products or services by credit card, we will need to ask you for your credit card number and expiration date, which is used solely to complete your order and otherwise kept confidential.
9. **Choice/Opting Out.** SAR recognizes the importance of your privacy. If you do not want your member information displayed or used in one or more of the manners described above, please follow these procedures. To opt out of having your name and business contact information included in the Membership Directory, please email us at: rmayer@sacrealtor.org or write us at: 2003 Howe Avenue, Sacramento, CA 95825, Attn: Member Services - Online Information. Please be sure to specify that you want to be removed from the Membership Directory Online. To ensure your request is processed in a timely manner, please provide your name, address, email address, phone number and broker's name. It may take up to (6) six weeks for SAR to process your request. Your name may be reproduced in the

Membership Directory during this time period. We apologize in advance for any inconvenience this may cause.

To opt out of having your business contact information provided to third parties, please email us at: rmayer@sacrealtor.org or write us at: 2003 Howe Avenue, Sacramento, CA 95825, Attn: Member Services - Third Party Opt Out. To ensure your request is processed in a timely manner, please provide your name, address, email address, phone number and broker's name. It may take up to (6) six weeks for SAR to process your request. You may continue to receive third party communications during this time period. We apologize in advance for any inconvenience this may cause.

PLEASE NOTE: If you are serving as a director or committee member of SAR you cannot opt out of having your name reproduced and your business contact information used in the manner described in Section 5 above.

10. **Corrections/Updates.** If there is member information about you that SAR maintains which needs to be corrected or updated, please email us at: rmayer@sacrealtor.org or write us at: 2003 Howe Avenue, Sacramento, CA 95825, Attn: Member Services - Corrections.
11. **Changes in This Policy.** From time to time, SAR may need to change this privacy policy to better meet the needs of our members. We reserve the right to change this policy at any time. Such changes may be made without prior notice. We encourage you to periodically check this privacy policy statement for the changes we make. Changes to this policy will be effective when posted on SAR's web site unless determined otherwise by the SAR Board of Directors.

Antitrust Compliance Policy

This Antitrust Compliance Policy applies to all Officers, Directors, Employees, and Members of the Sacramento Association of REALTORS® (SAR). It requires that such individuals comply with the behavior outlined below in all of their dealings on behalf of SAR.

Conduct expressly prohibited includes the following:

- Any discussion or effort to directly or indirectly fix, peg, stabilize, raise, lower or affect prices of commissions, products, advertising or credit terms;
- Any discussion of specific non-price business practices of any particular Members (except in the context of professional standards proceedings) or real estate commissions or other fees. This limitation shall not extend to discussions of methods of operation, maintenance, and similar matters in which cost or efficiency are merely incidental;
- Any discussion or effort by or among Members, non-members or competitors to eliminate or limit competition, to divide or allocate territories or customers, or to limit the nature of business carried on or products or services sold or to be sold;
- Any discussion or effort to engage in any group boycott or concerted refusals to deal;
- Any discussion or effort to injure or disparage the business or the trade of anyone, in compliance with the REALTOR® Code of Ethics.

SAR and its facilities shall not be used by an Officer, Director, Employee, Committee, or Member in connection with any anti-competitive or unlawful purpose, or unreasonable restraint of trade.

If at any formal or informal SAR meeting a topic is raised which appears to involve a violation of this Antitrust Compliance Policy, anyone in attendance has the right and all have the duty to interrupt and demand that the discussion be stopped. Those in charge of the meeting are responsible to see that this Policy is enforced so that the prohibited conduct is stopped immediately. If such conduct persists, those responsible shall terminate the discussion, cancel the remainder of the meeting, and refer the matter to the President and/or SAR legal counsel for further action to assure compliance with this Policy. 7/25/02

Confidentiality Policy

Information exchanged in meetings of the Board of Directors, Executive Committee, Budget Committee, Nominating Committee, Government Relations Committee, Grievance and Professional Standards Committees and PAC and Pension Trustees must be kept confidential. Discussions, votes and sensitive information need to be protected. The right of Members of these groups to speak out and voice their opinions without fear of recrimination is vital to their effective functioning.

Those who disagree with an outcome must understand that to carry the issue outside of a meeting can cause damage to the Association.

Confidentiality does not eliminate the responsibility of these groups to report on their activities and decisions to the Association as appropriate.

(Based on The Perfect Board by Calvin K. Clemons, CAE, CPM)

Administrative Screening Policy

All Sacramento Association of REALTORS® (SAR) members applying, seeking, or agreeing to perform one of the duties or to occupy one of the positions indicated below agree to be subject to an administrative screening conducted by the staff of SAR.

Administrative screening shall be a highly confidential process conducted by staff selected by the CEO. The results of the administrative screening shall be reported only as passed or failed. No reference shall be made as to which part or parts of the screening process the individual failed.

To facilitate the screening the individual agrees to execute a form or forms authorizing SAR to obtain the information necessary to complete the screening. Any individual refusing to permit the screening or failing to pass the screening shall be barred from performing the duty or occupying the position under consideration.

There shall be four levels of administrative screening identified as:

1. Initial administrative screening
2. General administrative screening
3. Political administrative screening
4. Enhanced administrative screening

An initial administrative screening shall be required of anyone:

1. To be a featured speaker at an SAR sanctioned or sponsored event including service as an instructor, panelist, or roundtable moderator at educational offerings, or to be a member of an SAR Committee

All persons subject to the initial administrative screening process shall be reviewed to ensure:

- a. That the individual has not been found in violation of the Code of Ethics or a membership duty within three years of the date of the screening.
- b. That the individual does not have an unresolved Accusation filed by the DRE or has not been disciplined by DRE within ten years of the date of screening.
- c. That the individual is current in all financial obligations to SAR.

A general administrative screening shall be required of anyone:

1. To be a member of the SAR Board of Directors
2. To be a representative of SAR at any outside event
3. To be a recipient of an SAR award for service
4. To serve as Chair or Vice-Chair of an SAR Committee
5. To attend Leadership Academy

All persons subject to the general administrative screening process shall be reviewed to ensure:

- a. That the individual has successfully passed the initial administrative screening.
- b. That the individual does not have an unresolved criminal complaint filed with any court of law or has not been convicted of a criminal offense within ten years of the date of screening.

A political administrative screening shall be required of anyone:

1. To be a member of the SAR, C.A.R. and/or NAR Board of Directors
2. To be a member of the LCRC Committee
3. To be a member of the Government Relations Committee

All persons subject to the political administrative screening process shall be reviewed to ensure:

- a. That the individual has successfully passed the general administrative screening.
- b. That the individual has contributed to the REALTOR® Action Fund at the \$148 level or higher for the year of screening and must agree to do so for the year(s) or service

An enhanced administrative screening shall be required of anyone:

1. To be Secretary/Treasurer of SAR
2. To be President-elect of SAR

All persons subject to the enhanced administrative screening process, in addition to the political administrative screening process described above, shall be reviewed to ensure:

- a. That the individual has not filed for bankruptcy or been the subject of an involuntary lien filed within three years of the date of screening
- b. That the individual's credit report does not show more than five late payments within one year of the date of screening

Any individual that passes the required level of screening but subsequently becomes aware of circumstances that would cause them to fail a subsequent screening shall resign from the position held or shall refrain from performing the duty for which they were considered.

Regional Meeting Policy & Guidelines

The purpose of the SAR Regional Marketing meetings is to provide Members with a frequent, decentralized opportunity to meet, network, receive appropriate SAR communications and market their listings and services to other Members.

1. All SAR Members are welcome to attend each meeting. Information on each meeting is available at www.sarcaravans.com.
2. Each Region will have a Regional Coordinator or two Co-Coordinators appointed by and serving at the pleasure of the SAR President. **At least one coordinator must be a REALTOR® Member of SAR.** The Coordinator(s) will preside over meetings, serve as the SAR liaison and as a member of the Regional Coordinators Committee, and will assure these Policy Guidelines are adhered to.
3. **Only REALTORS® or SAR affiliate members may regularly attend Regional Meetings.** Non-members may attend as guests of a Member and only with the permission of the Regional **Coordinator**. Non-members may be introduced but may not pitch listings, distribute flyers, or have listings on tour.
4. Regional Meetings are generally held every Tuesday morning except the Tuesday of the SAR main meeting, which is typically the first Tuesday of the month. Scheduled meeting cancellations include the Tuesdays following Memorial Day, Labor Day and the weeks of Thanksgiving, Christmas, and New Year.
5. SAR encourages a weekly caravan (tour) in each Region. Listings placed on any SAR Regional or Master Tour Sheet must comply with applicable SAR and MetroList rules.
6. SAR will provide each regional meeting with a projector to display materials during the meetings. Materials for display will be emailed to Coordinators each Monday by SAR staff. SAR will also ensure each meeting has a flag available for display at the meeting, either provided by the facility or by SAR.
7. Each Regional meeting should cover the following topics, as appropriate:
 - Pledge of Allegiance
 - Introductions and Anti-trust Reminder
 - Reading of SAR Announcements / Season charity campaigns
 - REALTOR® tour pitches (limited to one minute, or less at discretion of the Chair and limited to listings on tour that day).

- REALTOR® announcements, new listings, needs and wants (limited to one minute or less at discretion of the Chair)
 - Speaker
 - Affiliate/Finance Update
 - Raffle or door prize(s) and acknowledgement of donors
 - Adjourn to caravan (if held)
8. Regional Meetings that consistently abide by the foregoing criteria are eligible for a stipend of up to \$150 per week of which not more than \$25 may be used for purposes other than facility rental, paid or reimbursed via check to appropriate Coordinator or facility after receipt or invoice is delivered to SAR.

Regional Tour/ Caravan Rules Addendum

- a. Each region will use the following rules to create a caravan suitable for their meeting:
- ***Only REALTORS® may add listings to any SAR caravan***
 - Up to 10 homes will be on tour weekly, arranged in an efficient sequence.
 - Listings toured will be on a first come, first serve basis
 - No more than two listings per REALTOR®
 - Properties may not be re-toured except by permission of the Regional Coordinator.
 - There must be a MetroList™ approved lockbox present
 - REALTOR® or a representative must be present at the meeting to describe the property and participate in tour or property will not be toured
 - Tour properties will be confirmed by the Monday prior to the Tuesday meeting by the Regional Tour Coordinator.
 - Feedback forms may be filled out voluntarily by touring REALTORS®
 - No tour the Tuesday of the month when a Main Meeting is conducted
- b. **SAR “Open Tour” List (No arranged caravan)** -- The following rules apply for the open tour list, except that there is no organized caravan and the listing REALTOR® is not required to attend the meeting.
- ***Only REALTORS® may add listings to the SAR open tour list***
 - ***There must be a MetroList™ approved lockbox present***

Sacramento Association of REALTORS® (SAR) Ownership Disclosure and Conflict of Interest Policy

SAR Ownership Disclosure Policy

1. If a member has personal knowledge that SAR is considering doing business with an entity in which a member has any financial interest*, or with an entity in which the member serves in a decision-making capacity, then such member must disclose the existence of his or her financial interest or decision-making role prior to speaking to a decision-making body about the entity.
2. If a member has a financial interest in, or serves in a decision-making capacity for, any entity that the member knows is offering competing products or services as those offered by SAR, then such member must disclose the existence of his or her financial interest or decision-making role prior to speaking to a decision-making body about an issue involving those competing products and services.

After making the necessary disclosure, a member may participate in the discussion and vote on the matter unless that member has a conflict as described in the SAR Conflict of Interest Policy.

*Financial interest means any interest involving money, investments, credit or contractual rights.

SAR Conflict of Interest Policy

A member of any of SAR's decision-making bodies will be considered to have a Conflict of Interest whenever that member:

1. Is a principal, partner or corporate officer of a business providing products or services to SAR or in a business being considered as a provider of products or services (Business); or
2. Holds a seat on the Board of Directors of a Business unless the person's only relationship to the Business is service on such Board of Directors as SAR's representative; or
3. Holds an ownership interest of more than 1% of the Business.

A member with a conflict of interest must immediately disclose their interest at the outset of any discussion by a decision-making body pertaining to the Business or any of its products or services. Such member may not participate in the discussion relating to that Business other than to respond to questions asked of them by other members of the body. Furthermore, no member with a conflict of interest may vote on any matter in which the member has a conflict of interest, including votes to block or alter actions of the body, in order to benefit the Business in which they have an interest.

Attendance Policy

Members of Committees and/or the Board of Directors are expected to have consistent attendance at all regularly scheduled meetings of the Board or the Committee. Members that miss more than 25% of regularly scheduled meetings in any calendar year shall be subject to removal from the Board or Committee under the removal for cause provisions contained elsewhere in the Bylaws. Ex-officio members of committees shall not be subject to attendance requirements.

Attendance shall be satisfied based upon the attendance provisions contained in the meeting notice. Unless the meeting notice specifies otherwise all meetings are presumed to be noticed for physical presence at the location specified in the notice. If no location is specified in the notice the meeting shall be at the location where the meeting is normally held.

If the meeting is noticed for conference call, either audio or video, attendance shall be satisfied by participating in the conference call either remotely or by physical presence at the location where the meeting is normally held.

If the meeting is noticed for electronic attendance or electronic voting then attendance may only be satisfied by participation by that method.

If the meeting is noticed for physical presence an attendee may submit a written request for permission to attend remotely to the person presiding over the meeting and the staff liaison for the meeting at least one business day in advance of the scheduled meeting time. The requesting party shall be responsible for all their costs incurred in attending remotely. Remote attendance may only be approved if the provisions of California law requiring all attendees to hear all other attendees can be satisfied. Remote attendees shall be responsible for ensuring the confidentiality policy can be satisfied by attending from a location where neither the communications of the remote attendee nor any other attendee can be overheard or observed by any non-attending party. Members may only attend a meeting of each Committee or Board scheduled for physical attendance by remote means once in each calendar year.

SAR Events Alcohol Policy

This Association is committed to the responsible service of alcoholic beverages to responsible consumers. We are also committed to actions that will help reduce drunk driving. Events sponsored by SAR, SAR Master's Club, SAR Scholarship or SAR Charitable Foundation, whether for fundraising or for the benefit of its members, shall adhere to this policy when alcohol is served regardless of whether the event is held on or offsite.

1. No alcoholic beverages will be served to any person under 21 years of age or to any person who is visibly intoxicated.
2. Anyone who wishes to consume alcohol, may be required to present documentation that shows their proof of age, such as a driver's license. If proof is not presented when requested, alcohol will not be served to that individual.
3. No server will "free pour." All liquor will be dispensed in measured quantities.
4. Events that are catered with alcohol provided by the caterer may only have the caterer and its staff serve the alcohol.
5. Events serving liquor require a licensed bartender to serve at each dispensary. If a second dispensary only serves beer and wine, SAR volunteers and staff may serve at that dispensary in lieu of a licensed bartender.
6. Events serving only wine and beer may have SAR volunteers or staff serving alcohol
7. Any SAR volunteer or staff serving beer or wine may not consume alcohol immediately prior to or while serving.
8. In the event that an attendee appears intoxicated, a staff or volunteer shall make a sincere attempt to discourage the person from driving. Staff may send the person home via prepaid rideshare.

Membership Billing Policy

Members shall be billed for Dues and Assessments in accordance with Article IX of the SAR Bylaws.

Application Fees for SAR

REALTOR® Applications	\$100
Individual Affiliate Applications	\$40

Annual Dues for SAR

REALTOR® Dues	\$250
Individual Affiliate Dues	\$200

Payment Plans for REALTOR® Members

Installment Savings Plan.

Members may submit an application and start making advance payments at any time and in any amount, the only restriction being that each payment must be a minimum of \$50. This minimum is established to control administrative costs associated with the Plan.

All Members, including Affiliate Members, are eligible to participate in the plan, even those that had deficiencies in payments on other payment plans.

All funds received will be held in an account to be used only for the payment of future dues and assessments of the Member. No interest shall be paid on the funds being held. There are no fees charged for participating in the Plan and no contributions in excess of the basic dues and assessments are required for participation.

At the time of the next regular dues billing cycle the Member will be required to complete the dues form including identification of any voluntary payments to be paid. If there are sufficient funds on deposit for the benefit of the Member the dues shall be paid from those funds. If there is a shortfall in the amount on deposit the Member will be required to pay the difference **prior to the due date**.

If there are insufficient funds on deposit to pay the Members required payments **as of the due date** then all funds being held shall be returned to the Member and the Member's account shall be placed in default.

If there are excess funds in the account they will continue to remain on deposit for the benefit of the Member for future dues unless the Member requests a refund.

Installment Payment Plan.

SAR will provide an installment payment plan for renewing members to pay their dues in six equal monthly installments. The payment plan shall be interest free but shall include a nominal administrative fee to cover the cost of operating the program.

Members who apply for the Plan will be required to submit a completed application along with credit card authorization or six post-dated checks for the monthly installments to be received by SAR not later than the first business day of December of the preceding calendar year. Any application not received by SAR prior to 4:30 pm on the due date will be denied participation in the Plan. Members that have been in arrears to SAR on any financial obligation within twelve months prior to the application deadline will not be eligible for participation in the Plan. If an ineligible Member submits an application to SAR the application and any other documentation submitted shall be returned to the Member.

To participate in the Installment Payment Plan the Member will be required to pay all suggested contributions reflected in the total amount shown on the dues billing statement. A nominal fee will be added to cover the costs of administering the Plan. The balance shall be paid in six monthly installments with the first due on or before January 1 of the membership year and other payments on or before the first day of each successive month until paid in full. Once approved for the Installment Plan the Member may still chose to make payment in full and have the option to select voluntary contributions prior to January 1. On or after January 1 the terms of the Installment Program must be fully satisfied even if the Plan is paid in full prior to the due date.

For details on dates, amounts and processing procedures Members will need to refer to the Dues Payment Plan Application for the appropriate membership year.

External Communications Policy

This policy applies to all means of communication including spoken, email and social media.

The President and Chief Executive Officer are the official public spokespersons for the Association; they may delegate this role as appropriate. If any other Member is contacted regarding a policy or position of SAR they are encouraged to refer the contacting person or entity to the appropriate SAR spokesperson. If the personal opinion of any Member, rather than a position of SAR, is sought the Member is encouraged to contact SAR to receive background information and details of any relevant position SAR may have taken on the matter before speaking to the media.

Board members may be recognized as SAR Board of Directors members by others in the real estate profession and local media. When speaking with media, government regulatory or other agencies in their individual capacity, and not as SAR representatives, they must avoid the appearance of representing SAR. If an issue and/or topic relates to SAR, whether directly or indirectly, it must be assumed that any response from an Association Member will be perceived as an official response from SAR.

The use of the description as a member of SAR in an email or social media signature block would be equivalent to having that information in the signature block on a traditional written communication and the recipient could reasonably assume that the communication was being sent within that capacity as an official position of SAR. Use of any title or designation which could be reasonably construed as making the person a representative of SAR must be avoided. It is therefore inappropriate to be identified as a member of SAR in media messages in any manner unless the communication is formally sanctioned by SAR.

This policy should not be construed as prohibiting a Member of SAR from disclosing their position as an Officer, Director or Committee Member in signature blocks used to communicate with persons other than media representatives such as other SAR Members or clients, customers or potential clients or customers. However, such disclosure must not be misleading as prohibited by the REALTOR® Code of Ethics. As a minimum the disclosure should state the year or years in which the position was held.