Greater Los Angeles REALTORS®

POLICES & PROCEDURES

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SECTION 1: ASSOCIATION GOVERNANCE POLICIES

1.1 Rules of the Greater Los Angeles REALTORS®

An association may adopt or be issued various kinds of rules. Below is a historical narrative concerning the rules of the Greater Los Angeles REALTORS® (GLAR).

GLAR was established in the state of California on May 12, 1903, and holds one of the earliest charters granted by the National Association of REALTORS® (NAR). The charter prescribes GLAR's privileges and responsibilities, including the duty to abide by the Constitution and Bylaws and to observe the REALTOR® Code of Ethics of the National Association of REALTORS®.

Historical Timeline with NAR:

- **May 12, 1908** – The Los Angeles Realty Board (predecessor to GLAR) is officially chartered by the National Association of Real Estate Boards (NAREB), the predecessor to NAR.
- **1930–1969** – Various versions of the Board's Constitution and Bylaws are adopted (1930, 1941, 1946, 1965, 1969), reflecting the evolving governance and professional standards of the Association.
- **1974** – The Board enters into a formal agreement to use the term "REALTOR®" and executes an MLS license agreement with NAR.
- **1974–1977** – Name change filings are completed as part of organizational updates and jurisdictional alignment.
- **1975** – The West Hollywood Board of REALTORS® is chartered by NAR, establishing a distinct jurisdiction within the Los Angeles region.
- **1976** – The Beverly Hills Board of REALTORS® and the West Hollywood Board of REALTORS® merge, expanding service to a broader market area.
- **1996** – The Los Angeles Board of REALTORS® merges with the Beverly Hills Association of REALTORS®, forming the **Combined Los Angeles Westside Association of REALTORS® (CLAW)** and continuing NAR membership under its unified charter.
- **1997** – Following restructuring and rebranding, the organization continues its regional representation under the name Beverly Hills-Greater Los Angeles Association of REALTORS® (BHHGLAR).
- **2019** – The Association begins doing business as **Greater Los Angeles REALTORS® (GLAR)**, reflecting a modernized identity while retaining its NAR charter and REALTOR® commitments.

GLAR's historical documents include:

- NAR membership application (1923)
- Merger documentation (1976, 1996)
- Charter documentation and correspondence (1908–1997)
- Agreements to use the REALTOR® mark (1974, 1976, 1996)
- MLS license agreements and jurisdictional records

Reference: NAR Archives

Throughout its history, GLAR has served as a cornerstone of REALTOR® professionalism and advocacy in the Greater Los Angeles area, upholding the highest ethical and industry standards for more than a century.

GLAR is a California nonprofit mutual benefit corporation that has not obtained federal or California income-tax exemption and is therefore treated as a taxable corporation for federal and California tax purposes.

The following governing and reference documents are incorporated by reference into this Policy Manual and are available for review at the **GLAR Headquarters** in Culver City or upon request:

1. **National Association of REALTORS® (NAR) Documents**
    a. Constitution and Bylaws of the National Association of REALTORS®
    b. Code of Ethics and Standards of Practice of the National Association of REALTORS®
    c. Charter issued to the Greater Los Angeles REALTORS® by the National Association of REALTORS®
    d. Membership Criteria of the National Association of REALTORS®

2. **State of California Documentation**
    a. Articles of Incorporation granted by the **California Secretary of State** for the **Greater Los Angeles REALTORS®**, a Nonprofit Mutual Benefit Corporation
    b. Certificate of Good Standing and other required filings as maintained with the **California Secretary of State** and **Franchise Tax Board**

3. **Association Bylaws**
    a. The GLAR Bylaws provide the foundation for Association governance and may be amended by the Board of Directors and/or the membership in accordance with the procedures outlined therein and in these policies.

1.2 Policy Formulation vs. Policy Administration

Distinctions are often unclear between and among such terms as policies, rules, positions, directives, regulations, procedures, and practices. The following definitions shall serve as reference for **GLAR** concerning the terms used in this manual and within the Association generally:

1. **Articles and Bylaws** – Rules governing the operation of GLAR, adopted by the Board of Directors and/or the membership, as applicable.
2. **Rules of Order and Standing Rules** – Rules governing the operations of GLAR, adopted by the Board of Directors in session, with the advice and/or recommendation of staff.
3. **Positions** – Descriptive narratives, sometimes including recommendations, outlining the concerns and/or views of GLAR members on current issues, adopted by the Board of Directors in session, with the advice and/or recommendation of staff.
4. **Programs** – Descriptions of activities related to GLAR, adopted by the Board of Directors and/or membership in session, with the advice and/or recommendation of staff.
5. **Policies** – General or fundamental principles relating to Board involvement, adopted by the Board of Directors in session with advice and/or recommendation of staff. Policies are broad enough to allow latitude in implementation but narrow enough to provide clear guidance.
6. **Procedures** – Detailed explanations, directions, or actions to implement adopted articles, bylaws, rules, positions, programs, and policies. Procedures are established and applied by staff with the advice and/or recommendation of the Chief Executive Officer (CEO) and/or President. They address specific direction regarding how, by whom, and when actions are to be completed.

7. **Definitions**
    a. **Member in Good Standing** –A member in good standing is an individual who has paid all current dues, fees, and assessments and whose REALTOR® or Affiliate membership has not been suspended or terminated. Unless otherwise specified in this document, any reference to a "member" shall mean a member in good

standing.

b. **Standing Committee** – A standing committee addresses strategies, programs, and core functions of the Association through its direct action or by creating special committees or task forces to complete specific work.
c. **Special Committee** – A committee appointed for a limited purpose by the Executive Committee or a Standing Committee to manage a specific issue or program.
d. **Task Force** – A group appointed by the Executive Committee, a Standing Committee, or a Special Committee to conduct in-depth analysis on a defined issue or initiative. The Task Force reports its findings and recommendations to the body that appointed it, which then determines any appropriate action.
e. **Workgroup** – A group of members or subject-matter experts assembled to achieve specific goals within a focused topic area. Workgroups may be short- or long-term, but should disband upon completion of their assigned objectives to ensure efficiency and focus.
f. **Presidential Advisory Group (PAG)** – A small group (typically 3-5) people with a defined beginning and end, and a measurable outcome. The PAG provides recommendations to the Board of Directors and is intended as an outreach strategy to include members or industry professionals who are not currently engaged in other leadership roles. The President during whose term the PAG is expected to report shall make the appointments with board approval. The Presidential Advisory Group follows standard committee procedures as outlined in the current GLAR Policy Manual, including: documentation of its formation, purpose, method of selection, regular reporting, final report, and meeting minutes.
g. **Ex-Officio** – A person included by virtue of their position and considered a voting member unless otherwise stated.
h. **Chair** – The position or title of the individual designated to lead a Board, committee, workgroup, task force, forum, advisory group, Regional Advocacy Council, or other volunteer body. The Chair is generally responsible for leadership, coordination, and oversight of the body's activities and meetings. Non-voting unless otherwise specified.
i. **Presiding Officer** - The procedural function of conducting a meeting at a particular time. The Presiding Officer is typically the Chair of the body but may be another individual authorized to preside in the Chair's absence. The Presiding Officer is responsible for maintaining order, recognizing speakers, facilitating deliberations, and ensuring meetings are conducted in accordance with the Association's governing documents and applicable parliamentary authority. The Presiding Officer does not vote while presiding unless otherwise provided in the Association's Bylaws, these Policies & Procedures, or other governing authority.

1.3 Definition and Role of the Board of Directors

The Bylaws of GLAR define the Board of Directors as the governing body of the Association. Essentially, the Board of Directors is the Association's primary decision-making and policy-setting body, subject to the Association's Bylaws and Policies.

First and foremost, it serves as a policy-making body. Policy decisions are those that affect the organization as a whole — determining mission, vision, strategic goals, and programs on the broadest level.

Operational decisions affecting individual programs, services, personnel, or day-to-day efficiency and service quality fall under the authority and management of the Chief Executive Officer (CEO).

As further defined in the GLAR Bylaws, the Board of Directors consists of the following voting members:

- President
- President-Elect
- First Vice President
- Treasurer *(appointed)*
- Immediate Past President
- Five (5) REALTOR® Directors
- One (1) REALTOR® Director *(appointed)*

A basic rule is that the legal entity, rather than the Board of Directors, is the holder of legal power. The powers of the Directors are not inherent in them personally, but in the organization as a whole. The principle remains that Directors exercise the powers of the organization, but do not own it.

Thus, the Board of Directors has the power and duty to carry out whatever transactions the corporation itself has the lawful authority to undertake. The Board's authority is superior in ordinary matters, so long as it is exercised lawfully and in the best interests of the Association.

The Board of Directors serves as the trustee of the Association's mission, assets, and integrity. Regardless of how authority is delegated to committees, staff, or affiliates, the Board—and therefore each Director—remains ultimately accountable for the Association's actions and compliance with applicable law. The Board holds in trust the principal responsibility for fulfilling GLAR's mission, vision, and strategic objectives, while maintaining legal and fiduciary oversight.

This responsibility does not mean that Directors should fear liability for every organizational challenge or loss. GLAR Directors are protected from liability for reasonable errors in judgment so long as they act in good faith, with due care, and in the best interests of the Association.

Directors must always act with the utmost integrity and keep the interests of GLAR and its members foremost in mind. They should avoid any personal or professional conflict of interest, and must not enter into contracts or arrangements that serve their personal or financial interests at the expense of the Association.

Finally, as elected or appointed leaders, Directors represent both GLAR and the broader real estate profession. Their conduct can either enhance or diminish the reputation of the organization. Each Director has an important responsibility to uphold the credibility, ethics, and professionalism of GLAR in all interactions with members, partners, and the public.

1.4 Standing Rules for the Board of Directors

Rule 1: Meetings

- **Section 1.** Meetings shall be conducted in accordance with the Bylaws and Standing Rules. Cases not otherwise covered shall be governed by the most current edition of Robert's Rules of Order Newly Revised. Meetings may be held in person, virtually, or in a hybrid format as permitted under California law and the GLAR Bylaws.

  Board meetings are closed sessions; however, exceptions for guests may be granted on a case-by-case basis at the discretion of the President or by approval of the Board of Directors.

Rule 2: Agendas

- **Section 1.** Preliminary meeting agendas shall be prepared by the President and the Chief Executive Officer.
- **Section 2.** Final meeting agendas shall be adopted by the Board of Directors.

Rule 3: Executive Sessions

- **Section 1.** Only Board Members, the Chief Executive Officer, and specified staff may attend Executive Sessions, unless an exception is granted by the President or a majority of the Board present and voting.
- **Section 2.** Participants may not record or disclose discussions held during Executive Session, except as required by law.

Rule 4: Speaker Recognition

- **Section 1.** Members, Directors, volunteer leaders, committee/workgroup members, invited guests, and other authorized participants wishing to speak shall first be recognized by the Presiding Officer before addressing the body.

Rule 5: Motions

- **Section 1.** Motions for consideration by the Board of Directors may be submitted by individual Directors or Staff Liaisons (on behalf of committees and/or workgroups) to the Chair or the Chief Executive Officer, in writing or electronically, at least twenty-one (21) business days in advance of the agenda being set.

Rule 6: Voting

- **Section 1.** All Directors are entitled to participate fully in the discussions and deliberations of the Board of Directors. Only Directors may vote on matters before the Board. Guests or staff may be invited to provide information or reports at the discretion of the President or the Board, but they shall not participate in deliberations or voting. Except when presenting information or responding to questions at the request of the Board, guests and staff should not be present during Board debate or while votes are being taken.
- **Section 2.** Unless another form of voting is requested by a Director, voting on matters shall be by voice vote, except when ballots are necessary for votes on officer and director elections, dues changes, or bylaw amendments.
- **Section 3.** Roll call votes may be requested by the Meeting Chair or any Director. The President or their designee shall call the name of each Director for his or her vote.
- **Section 4**. Electronic or remote voting methods may be used when permitted by the Bylaws and state law.

Rule 7: Policies

- **Section 1.** Policies may be adopted, revised, deleted, or suspended by the Board of Directors at any regular or special meeting, provided sufficient notice and background information are given in advance to allow Directors the opportunity to review and make an informed decision. Emergency policy actions may only be taken without prior notice when immediate action is necessary to protect the interests of the Association, and such actions shall be reported and ratified at the next regular Board meeting.
- **Section 2.** Adopted policies shall not conflict with the Bylaws.
- **Section 3.** Adopted policies shall be included in the Policy Manual and maintained in both printed and electronic form.

Rule 8: Minutes

- **Section 1.** Minutes shall be kept for all meetings of the Board of Directors.
- **Section 2.** Draft minutes shall be communicated to each Board Member in a timely manner following each meeting, allowing sufficient time for review prior to the next scheduled

meeting.

- **Section 3.** After the draft minutes are approved, they may be made available for general distribution.
- **Section 4.** Draft and official Executive Session minutes shall be maintained separately and are available only to members of the Board.
- **Section 5.** Approved minutes may be distributed electronically and archived in the Association's secure digital record system.

Rule 9: Attendance

- **Section 1.** Three (3) absences in a twelve (12)-month period (one-year term) will result in the automatic removal of the Director. There is no avenue for excused absences.
- **Section 2.** The Board meeting schedule shall be established well in advance, and the President has the discretion to designate each meeting as in-person, virtual, or hybrid.
- **Section 3.** Participation via authorized virtual attendance shall be considered present when a virtual option is offered for that particular meeting. Directors attending virtually must be visible on camera at all times.

Rule 10: Ballot Voting

- **Section 1.** Board voting on election of officers, bylaw amendments, policies, and annual dues amounts shall be conducted as prescribed in the Bylaws or through adopted policy.
- **Section 2.** All physical ballots shall be destroyed at the close of the business meeting after validation by the President and Chief Executive Officer.
- **Section 3.** Electronic ballots shall be securely archived per the Association's record retention policy.

Rule 11: Amendments, Deletions, Additions, or Suspension

- **Section 1.** These Standing Rules may be amended, deleted, added to, or suspended at any regular or special meeting of the Board of Directors by a majority vote of those present and voting.

  Additional governance expectations, leadership responsibilities, standards of conduct, confidentiality requirements, and service obligations applicable to Directors, Officers, volunteer leaders, and volunteer members may be set forth in the Association's Agreement to Serve, which shall be executed and complied with as required by these Policies and Procedures.

1.5 Code of Conduct for Board of Directors, Volunteer Leaders, and Volunteer Member

GLAR establishes this policy to ensure that all Directors, Officers, Committee and Workgroup Members, and other Volunteer Leaders ("Leaders") conduct Association business in a manner consistent with GLAR's mission, governing documents, and the highest ethical standards of professionalism, accountability, and compliance.

This policy applies to all individuals serving in an elected, appointed, or volunteer leadership capacity on behalf of GLAR. It defines expectations for conduct, attendance, confidentiality, conflicts of interest, compliance with antitrust laws, and protection of whistleblowers.

A. Fiduciary Duties and Guiding Principles

Leaders shall uphold their fiduciary responsibilities in accordance with California law and GLAR's Bylaws and governance documents, including:

- **Duty of Obedience:** Act within the authority of GLAR's governing documents and consistent with its mission.

- **Duty of Loyalty:** Place the interests of GLAR above personal or third-party interests; avoid conflicts and self-dealing.
- **Duty of Care:** Exercise diligence, preparation, and good faith judgment in decision-making.

Leaders are expected to perform their roles with professionalism, fairness, and respect in all dealings on behalf of the Association.

B. Confidentiality Standards

1. Confidential Information includes, but is not limited to, board meeting discussions, executive session discussions, personnel or legal matters, contracts, financial data, member disciplinary matters, non-public plans or strategies, documents, and any information designated confidential by the Chair, CEO, or Board.
2. Leaders shall not disclose or use confidential information for personal or professional gain, and shall maintain confidentiality during and after their term of service.
3. The Chair or presiding officer is responsible for designating confidential items, maintaining order, and excusing individuals who are not authorized to participate.
4. Virtual meetings are subject to the same confidentiality requirements.
5. Recording or sharing of any discussion or document is prohibited unless expressly authorized.
6. Leaders shall return or securely delete confidential materials, as soon as they are no longer needed or upon conclusion of their service, whichever occurs first.

Violation of confidentiality constitutes a breach of fiduciary duty and may result in disciplinary action, including removal from office, loss of future eligibility, or referral to legal counsel or the Professional Standards Committee.

C. Conflict of Interest

1. Leaders shall avoid any actual or perceived conflict of interest between personal, professional, or financial interests and those of GLAR.
2. Leaders must disclose in writing any potential conflicts or interests in organizations, contracts, or activities related to GLAR's business prior to discussion or decision-making.
3. No Leader shall use information, influence, or position for personal benefit or to the detriment of GLAR.
4. A Leader with a disclosed conflict shall abstain from discussion and voting, as determined by the Chair or Board.
5. All contracts or transactions involving a potential conflict must comply with California Corporations Code §5233 and GLAR's disclosure procedures.

Failure to disclose or improper use of position constitutes a breach of fiduciary duty and may result in disciplinary action including removal from office, loss of future eligibility, or referral to legal counsel or the Professional Standards Committee.

D. Adversity to the Association; Mandatory Resignation

A Director who files, commences, or is named as a party bringing a lawsuit, arbitration, or other formal legal or administrative proceeding against the Association, the Board of Directors, or any Officer or Director acting in an official capacity, or who communicates a direct threat to do so, shall be deemed to be in a position directly adverse to the interests of the Association.

Upon the occurrence of such an event, the Director shall immediately disclose the matter to the President and Chief Executive Officer and shall voluntarily resign from the Board of Directors and from any other office, committee, workgroup, or leadership position held with the Association.

This policy does not apply to (a) a Director's participation, in the ordinary course, in the Association's own arbitration or professional standards processes under Article VII of the Bylaws, or (b) a proceeding initiated with the express prior authorization of the Board of Directors.

Failure to voluntarily resign as required by this policy shall be treated as a breach of fiduciary duty and grounds for removal under Article X, Section 7 of the Bylaws and applicable provisions of this Code of Conduct.

E. Antitrust Compliance
All GLAR activities must comply with federal and state antitrust laws.

The following topics shall never be discussed in any GLAR meeting, event, or communication:

- Commission rates or fees charged to clients;
- Agreements to fix or standardize prices, fees, or services;
- Boycotts or refusals to deal with specific individuals, firms, companies, competitors, vendors, service providers, or platforms;
- Market or client allocation; and
- Efforts to discourage business with any vendor, broker, or association.

If any prohibited topic arises, meeting participants must immediately halt discussion, notify the Chair or staff liaison, and report the issue to the CEO.

Violations may result in disciplinary action and may be referred to legal counsel or regulatory authorities.

F. Whistleblower Protection
GLAR encourages open communication and requires all Leaders and staff to report suspected violations of law or policy in good faith.

1. Reports concerning any Association volunteer leader, officer, director, committee member, task force member, workgroup member, or staff member may be made to the CEO or the President. If the President is the subject of the report, the report shall be made to the President-Elect. If the CEO is the subject of the report, the report shall be made to the President. If the report involves both the CEO and the President, or otherwise presents a conflict involving the President-Elect, the matter shall be reported directly to the Association's legal counsel for guidance and appropriate handling.
2. Individuals who report in good faith are protected from retaliation or adverse treatment.
3. Reports may be made confidentially or anonymously and will be reviewed and investigated promptly by the CEO, President, or their designee(s), with assistance from Association legal counsel as appropriate. Matters requiring Board consideration shall be referred to the Board in accordance with the Association's governing documents and these Policies & Procedures.
4. Malicious or knowingly false reports are prohibited and may result in disciplinary action, up to and including removal from any Association volunteer position.

Violations of this policy may result in removal from leadership positions or other disciplinary action.

G. Professional Conduct and Representation

1. Leaders shall demonstrate honesty, civility, fairness, and integrity in all Association activities and communications.
2. Leaders shall treat all participants with respect, follow meeting procedures, avoid

disruptive behavior, and comply with Robert's Rules of Order.
3. Leaders shall not publicly disparage GLAR, its leadership, committees, or staff. Concerns shall be directed privately to the Chair or Chief Executive Officer.
4. Leaders shall refrain from using their position to influence personal business or promote competing organizations.
5. Leaders shall uphold GLAR's reputation through professional behavior at all events and in all public interactions.

H. Financial Practices

1. Leaders must exercise prudent judgment and ensure that expenses submitted for reimbursement are reasonable and compliant with GLAR's expense and travel policies.
2. Requests for reimbursement must include appropriate documentation.
3. The CEO may deny reimbursement for excessive or unapproved expenses.

Violations of this policy may result in disciplinary action, including censure, removal from leadership, suspension of future service eligibility, and/or referral to legal counsel or the Professional Standards Committee. The Board of Directors delegates authority to the Chair and CEO to implement procedures to enforce this policy.

1.6 Governance and Meeting Standards

1.6.a Purpose: GLAR is committed to maintaining a culture of professionalism, respect, transparency, collaboration, and effective governance. These standards establish expectations for participation in meetings of the Board of Directors, Executive Committee, committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies.

1.6.b Meeting Conduct: Participants shall:

- Come prepared, having reviewed meeting materials in advance.
- Arrive on time and remain until adjournment unless excused.
- Seek recognition from the Chair before speaking.
- Listen attentively and avoid interrupting others.
- Respect differing viewpoints and focus discussion on issues rather than individuals.
- Avoid side conversations and distractions.
- Adhere to applicable time limits established by the Chair.
- Conduct themselves in a professional and respectful manner consistent with the Association's Code of Conduct.

The Chair or meeting facilitator shall be responsible for maintaining order, decorum, and productive discussion.

1.6.c Deliberation Standards: Participants shall:

- Consider all relevant facts and information before reaching conclusions.
- Engage in constructive discussion focused on the merits of an issue.
- Avoid personal attacks, political factions, cliques, or efforts to advance personal interests over the interests of the Association.
- Exercise independent judgment when participating in Association business.
- Support a culture of professionalism, collaboration, and mutual respect.

Parliamentary procedure exists to facilitate fair and orderly discussion and shall not be used to obstruct discussion, delay business, or advance personal agendas.

1.6.d Voting and Decisions: Members participating in Association governance shall respect the

integrity of the deliberative and voting process.

No individual shall attempt to improperly influence, pressure, or solicit commitments regarding pending votes outside of the established meeting process.

Leaders retain the right and responsibility to express differing viewpoints during deliberations. Following final action by the Board of Directors or other authorized body, leaders shall respect and support the decision of the Association and shall not misrepresent personal views as official Association positions.

1.6.e Agenda Discipline and Due Diligence: Association business shall be conducted through established governance processes.

Matters requiring action should be appropriately reviewed before presentation for consideration and should include, as applicable:

- Strategic alignment and organizational impact;
- Financial considerations and budget implications;
- Legal, governance, and risk management considerations;
- Operational feasibility and staffing impact; and
- Implementation timelines and success measures.

The Board of Directors, Executive Committee, committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies shall conduct business within their assigned authority and responsibilities.

1.6.f Governance Concerns: Individuals have an affirmative duty to report known or reasonably suspected material violations of fiduciary duties, governance standards, conflicts of interest, legal obligations, or Association policies. Knowingly failing to report, concealing, or attempting to conceal such violations may itself constitute misconduct and may result in disciplinary action, up to and including removal from a volunteer position or termination of employment, as applicable.

1.6.g Electronic Meeting Standards: Meetings conducted in person or through electronic platforms shall comply with Association policies regarding confidentiality, meeting conduct, recording restrictions, and use of technology.

Audio recordings, video recordings, artificial intelligence (AI) note-taking applications, transcription services, automated meeting summaries, AI companions, and similar technologies are prohibited unless expressly authorized by the Chief Executive Officer or required by law.

Virtual meeting chat functions may be disabled or restricted by the Association to maintain orderly discussion and meeting integrity.

Participants attending virtual meetings shall participate from an environment that preserves the confidentiality of Association business and minimizes interruptions or unauthorized access to discussions. Participants are responsible for ensuring that all discussions and meeting materials cannot be overheard, viewed, recorded, or accessed by unauthorized individuals. Participants attending virtual meetings shall confirm and maintain a confidential environment throughout the meeting and shall immediately disclose any circumstance that may compromise confidentiality.

Participation in Association meetings while operating a motor vehicle is strictly prohibited. Participants attending virtual meetings shall maintain active attention to the meeting and shall not participate while operating a motor vehicle or engaging in any activity that would impair their ability

to fully participate in deliberations and decision-making. Consistent with California law prohibiting the use of handheld electronic devices while driving and the fiduciary responsibilities of Association leaders, participants shall not attend, appear on camera, vote, deliberate, or otherwise participate in Association meetings while driving a vehicle.

Any participant observed driving or otherwise operating a motor vehicle while connected to an Association meeting shall be required to immediately disconnect from the meeting until they are safely parked and able to participate in compliance with this policy. If the participant does not voluntarily disconnect, they may be placed in the virtual waiting room or removed from the meeting until they are able to comply.

Official meeting records shall be maintained only through approved Association processes.

1.7 Agreement to Serve Requirement

All members of the Board of Directors and individuals serving in any elected, appointed, or volunteer leadership capacity on behalf of the Association shall execute and comply with the Association's Agreement to Serve as a condition of service.

The Agreement to Serve incorporates and supplements applicable provisions of the Association's Bylaws, Policies and Procedures, Code of Conduct, Conflict of Interest Policy, Confidentiality Requirements, Antitrust Policy, Harassment Policy, and other governing documents adopted by the Board of Directors.

Appointments, elections, or leadership assignments shall not become effective until all required onboarding requirements, including execution of the Agreement to Serve, have been completed.

Failure to comply with the Agreement to Serve may result in disciplinary action, including but not limited to:

- Removal from a committee, workgroup, task force, forum, advisory group, or leadership position;
- Removal from office where permitted by the Bylaws;
- Ineligibility for future appointments or leadership opportunities;
- Suspension of travel reimbursement, complimentary registrations, or other leadership benefits; and
- Referral to Professional Standards, legal counsel, or other appropriate action when applicable.

The Board of Directors shall have final authority regarding the interpretation, enforcement, and administration of this policy, consistent with the Bylaws and applicable law. Nothing herein shall limit the Association's ability to take action where a violation of the Agreement to Serve has occurred.

1.8 Board Composition and Organization

The composition, qualifications, election, appointment, succession, removal, and terms of service for Officers and Directors shall be governed by the Association Bylaws.

The Board of Directors shall organize and conduct its affairs in accordance with the Bylaws, these Policies and Procedures, and applicable governing documents adopted by the Board of Directors.

1.9 Duties of the President

1.9.a Serves as the chief elected officer of the Association, representing the entire membership and advancing its best interests within the limits of the Articles of Incorporation, Bylaws, Policies, and Strategic Plan. The President is responsible for overall leadership of the Association and holds authority commensurate with those responsibilities.

1.9.b Serves as an Officer of the Association and Chair of the Executive Committee, facilitating Executive Committee meetings and participating in discussions, deliberations, and decisions as provided in the Bylaws and Policies and Procedures.

1.9.c In accordance with Robert's Rules of Order Newly Revised, the President (Chair) does not vote on motions so as to maintain impartiality while presiding. The President may, however, cast a vote when that vote will affect the outcome—that is, to break or create a tie, or when voting by ballot, when all members are entitled to vote. This limited voting right preserves fairness and neutrality in Board deliberations.

1.9.d Serves as Chair of the Board of Directors, presiding over meetings and keeping the Board informed of the condition, operations, and performance of the Association.

1.9.e Serves as the official spokesperson for the Association, in coordination with the Chief Executive Officer (CEO), ensuring consistency and professionalism in all public statements and communications.

1.9.f Provides leadership in the development of volunteer leaders and participates, as a member of the Executive Committee.

1.9.g Works collaboratively with and provides oversight of the Chief Executive Officer in accordance with the CEO's employment agreement and job description, ensuring alignment with the Association's goals, policies, and budget.

1.9.h Participates in the selection, evaluation, and hiring of the Chief Executive Officer (CEO) through the Executive Committee, or through such other process as may be established by Board policy, the Association's succession plan, or action of the Board of Directors.

1.9.i Leads the process for reviewing, monitoring, and evaluating the CEO's performance on behalf of the Board, ensuring accountability and achievement of strategic objectives.

1.9.j Convenes and chairs meetings of the Officers/Executive Committee for annual review of organizational performance, fiscal health, and overall Association effectiveness.

1.9.k Directs and guides the Board of Directors in formulating policies, priorities, and programs that further the goals and objectives of GLAR and the REALTOR® organization.

1.9.l Serves as the official host of the Association at its events, meetings, and community activities, promoting unity, professionalism, and goodwill among members and partners.

1.9.m Reviews and, when authorized by the Board, executes contracts and official documents in conjunction with the CEO, ensuring compliance with policy and financial parameters.

1.9.n Serves as an ex-officio, non-voting member of all Association committees, workgroups, forums, and task forces, consistent with Robert's Rules of Order Newly Revised, with the right to

attend and participate in deliberations.

1.9.o Monitors Association financial performance and expenditures to assure operations remain within the approved annual budget and fiscal policies.

1.9.p Participates, as a member of the Executive Committee, in the collaborative selection of Committee Chairs, Vice Chairs, and Workgroup Leads for recommendation to the Board of Directors for ratification, in accordance with Section 3.4.g of these Policies and Procedures; retains authority to establish and appoint members to special committees, task forces, forums, and advisory groups, subject to approval of the Board of Directors; and monitors the progress of all volunteer bodies in alignment with the Strategic Plan.

1.9.q Performs additional duties as may be directed by the Board of Directors or as required by the Bylaws and Policies.

1.9.r Appoints Director Liaisons to Association committees and workgroups ensuring effective communication between the Board and volunteer bodies.

1.9.s Maintains familiarity with all governing documents, financial policies, and the Strategic Plan, and leads efforts to implement the Association's objectives, initiatives, and long-term strategies.

1.9.t Automatically serves as a C.A.R. Director, contingent upon meeting the eligibility and qualification requirements and upon confirmation by the GLAR Board of Directors.

1.10 Duties of the President-Elect

1.10.a Assumes the responsibilities of the President in his or her absence and assists in carrying out the functions of that office. Performs duties delegated by the President and the Board of Directors. This position serves as a leadership development and orientation role in preparation for assuming the Presidency.

1.10.b Serves as an Officer of the Association and a member of the Executive Committee, participating in officer discussions and decisions as outlined in the Bylaws and Policies.

1.10.c Serves as a voting member of the Board of Directors, participating fully in deliberations and decision-making on behalf of the membership.

1.10.d Performs duties assigned by the President, which may include serving as chair of one or more Association committees, workgroups, or task forces.

1.10.e Represents the Association with other associations, organizations, and community partners as requested by the President.

1.10.f Works collaboratively with the President, Chief Executive Officer (CEO), and Executive Committee to plan programs and activities for the upcoming year, ensuring alignment with the Strategic Plan and organizational goals.

1.10.g Assists the President in the performance of his or her duties whenever requested, ensuring continuity of leadership and effective communication between officers, committees, and staff.

1.10.h Participates, as a member of the Executive Committee, in the review and evaluation of the CEO's performance in accordance with established policies, procedures, and timelines.

1.10.i Maintains familiarity with all governing documents of the Association and supports the implementation of the objectives and strategies outlined in the Strategic Plan.

1.10.j Automatically serves as a C.A.R. Director, contingent upon meeting the eligibility and qualification requirements and upon confirmation by the GLAR Board of Directors.

1.10.k Participates, as a member of the Executive Committee, in the collaborative process for recommending Committee Chairs, Vice Chairs, and Workgroup Leads to the Board of Directors for ratification, as provided in Section 3.4.g of these Policies and Procedures.

1.11 Duties of the First Vice President

1.11.a Assumes the responsibilities of the President in their absence when the President-Elect is unavailable to perform those duties. Assists the President and President-Elect in carrying out the functions of their offices and performs specific duties as delegated.

1.11.b Serves as an Officer of the Association and a member of the Executive Committee, participating in officer discussions and decisions as outlined in the Bylaws and Policies.

1.11.c Serves as a voting member of the Board of Directors, participating fully in deliberations and decision-making on behalf of the membership.

1.11.d Serves as Vice Chair to the Nominating Committee and/or other task forces as may be established by the President or Board of Directors.

1.11.e Assists the President and President-Elect with assignments, initiatives, and operational duties as requested.

1.11.f Works in coordination with the President, President-Elect, and Chief Executive Officer (CEO) to implement the programs, policies, and activities of the Association in alignment with approved goals and directives.

1.11.g Represents the Association at meetings, events, or functions of other REALTOR® associations, community organizations, or partner entities as assigned by the President.

1.11.h Collaborates with the President-Elect, Executive Committee, and CEO in planning and developing programs, events, and priorities for the upcoming year in concert with the Strategic Plan.

1.11.i Performs additional duties as may be assigned by the President or Board of Directors.

1.11.j Participates, as a member of the Executive Committee, in the review and evaluation of the CEO's performance in accordance with established policies, procedures, and timelines.

1.11.k Maintains familiarity with all governing documents of the Association and assists in the implementation of the objectives and strategies outlined in the Strategic Plan.

1.11.l In coordination with the Chief Executive Officer, monitors and reports on the progress of the Association's Strategic Plan initiatives, providing regular updates to the Board of Directors and ensuring alignment between strategic goals, operational activities, and member needs.

1.11.m Automatically serves as a C.A.R. Director, contingent upon meeting the eligibility and qualification requirements and upon confirmation by the GLAR Board of Directors.

1.11.n Participates, as a member of the Executive Committee, in the collaborative process for recommending Committee Chairs, Vice Chairs, and Workgroup Leads to the Board of Directors for ratification, as provided in Section 3.4.g of these Policies and Procedures.

1.12 Duties of the Treasurer

1.12.a Ensures the integrity and transparency of the fiscal affairs of the Association and serves as a voting member of the Board of Directors.

1.12.b Serves as an Officer of the Association and a member of the Executive Committee, participating in officer discussions and decisions as outlined in the Bylaws and Policies.

1.12.c Serves as Chair of the Finance Committee, leading the review and development of the annual operating budget in collaboration with the Chief Executive Officer (CEO) and accounting staff, and presents the committee's recommendations to the Board of Directors for approval.

1.12.d Reviews monthly financial statements with the accounting staff and CEO, and reports to the Board of Directors, highlighting significant variances between budget and actual results, identifying reasons for such variances, and noting corrective actions or recommendations.

1.12.e Reviews and makes recommendations to the Finance Committee, accounting staff, and CEO regarding the Association's investments and cash management, ensuring compliance with the Association's Investment Policy and best financial practices.

1.12.f Monitors the implementation of internal financial controls and reporting standards, ensuring compliance with all applicable accounting principles, nonprofit regulations, and Board policies.

1.12.g Ensures that the annual financial review or audit is conducted by an independent certified public accountant (CPA) and presents the audit findings and management letter to the Finance Committee and Board of Directors.

1.12.h Supports the President, Executive Committee, and CEO in monitoring the overall financial performance and long-term fiscal health of the Association, including reserves and capital planning.

1.12.i Serves as a financial resource (with accounting staff) and advisor to the President, Board of Directors, and Finance Committee, assisting in the evaluation of funding proposals, major expenditures, and strategic financial initiatives.

1.12.j Participates, as a member of the Executive Committee, in the review and evaluation of the CEO's performance in accordance with established policies, procedures, and timelines with attention to fiscal accountability and stewardship.

1.12.k Maintains familiarity with all governing documents, financial policies, and the Strategic Plan, and assists in aligning fiscal decisions and resource allocations with the Association's objectives and strategies.

1.12.l Performs additional duties as may be assigned by the President or Board of Directors.

1.12.m Automatically serves as a C.A.R. Director, contingent upon meeting the eligibility and qualification requirements and upon confirmation by the GLAR Board of Directors.

1.12.n Participates, as a member of the Executive Committee, in the collaborative process for recommending Committee Chairs, Vice Chairs, and Workgroup Leads to the Board of Directors for ratification, as provided in Section 3.4.g of these Policies and Procedures.

1.13 Duties of the Immediate Past President

1.13.a Serves as a voting member of the Board of Directors and as a resource and advisor to the succeeding leadership team, providing guidance, continuity, and institutional knowledge.

1.13.b Serves as an Officer of the Association and a member of the Executive Committee, participating in officer discussions and decisions as outlined in the Bylaws and Policies.

1.13.c Automatically assumes the position of Immediate Past President upon completion of their term as President and serves for a period of one (1) year. In the event of a vacancy, removal, resignation, incapacity, or other leadership circumstance, succession and service shall be governed by the Bylaws and any applicable Board-approved succession plan.

1.13.d Serves as Chair and Board Liaison to the Nominating Committee and/or other task forces as may be established by the President or Board of Directors.

1.13.e Makes reasonable efforts to attend and participate in all major Association events, including strategic planning sessions, general membership meetings, and broker/manager meetings as needed.

1.13.f Provides support and counsel to the President and President-Elect, ensuring leadership continuity and adherence to the Association's Strategic Plan and objectives.

1.13.g Participates, as a member of the Executive Committee, in the review and evaluation of the CEO's performance in accordance with established policies, procedures, and timelines.

1.13.h Maintains familiarity with all governing documents, fiscal policies, and the Strategic Plan, and assists in the implementation of the Association's long-term goals and strategies.

1.13.j Performs other duties as may be assigned by the President, Executive Committee, or Board of Directors.

1.13.k Automatically serves as a C.A.R. Director, contingent upon meeting the eligibility and qualification requirements and upon confirmation by the GLAR Board of Directors.

1.13.l Participates, as a member of the Executive Committee, in the collaborative process for recommending Committee Chairs, Vice Chairs, and Workgroup Leads to the Board of Directors for ratification, as provided in Section 3.4.g of these Policies and Procedures.

1.14 Duties of the Directors

1.14.a The ultimate authority and responsibility for the affairs of the Association rest with the Board of Directors. Under applicable state and federal law, the Board is legally responsible for the activities, assets, and fiscal integrity of the Association. **The Board's primary role is to establish policy, provide strategic direction, and ensure that the Association operates in a**

manner consistent with its mission, governing documents, and fiduciary responsibilities.

1.14.b Serves as the policy-making body of the Association, ensuring that decisions advance the interests of the membership and support the objectives of the Strategic Plan.

1.14.c Represents the collective interests of the membership, ensuring that programs, services, and advocacy efforts reflect the diverse needs of all members.

1.14.d Reviews, approves, and evaluates the programs, activities, and initiatives of the Association to ensure they are effective, mission-driven, and financially sustainable.

1.14.e Provides strategic leadership in planning the future direction of the Association, setting measurable goals and priorities that align with the Association's mission and the broader REALTOR® organization.

1.14.f Establishes and maintains Association policies that guide operations, support transparency, and uphold the highest ethical and professional standards.

1.14.g Adopts the annual budget, establishes financial objectives, monitors their achievement, and ensures that adequate financial and operational controls are in place to safeguard the Association's resources.

1.14.h Promotes and supports ethical conduct, inclusivity, and professionalism, setting the tone for leadership and behavior within the Association.

1.14.i Maintains familiarity with all governing documents, fiscal policies, and the Strategic Plan, and assists in advancing the Association's objectives, strategies, and initiatives.

1.14.j Performs additional duties as may be prescribed by the Bylaws, Policies, or Board of Directors.

1.15 Duties of the Chief Executive Officer

1.15.a Authority
The Chief Executive Officer ("CEO") is employed by the Association. The recruitment and selection of a Chief Executive Officer shall be conducted in accordance with the Association's Chief Executive Officer Succession Plan. As provided therein, the Executive Committee shall oversee the recruitment, selection, evaluation, and approval of the CEO's employment agreement and any amendments thereto, including the appointment of a CEO Search Committee or Task Force, as appropriate. The appointment of the Chief Executive Officer shall be subject to ratification by the Board of Directors. The CEO serves as the Association's chief staff executive and is delegated authority by the Board of Directors to manage the affairs, operations, personnel, and resources of the Association, subject to the limitations established by the Bylaws, these Policies and Procedures, the annual budget, the strategic plan, and applicable law.

1.15.b Purpose
The Chief Executive Officer serves as the Association's chief staff executive and is responsible for the effective leadership, administration, and management of the Association in support of its mission, vision, strategic priorities, and objectives. The CEO serves as the primary link between the Board of Directors and Association staff and is accountable for implementing Board-approved policies, programs, budgets, and strategic initiatives.

1.15.c Responsibilities

A. Organizational Leadership:
- Provide leadership and direction for the Association's operations, programs, services, and resources in a manner that advances the Association's mission and strategic objectives.
- Foster a culture of professionalism, service, innovation, accountability, and continuous improvement throughout the organization.
- Ensure the Association maintains the operational capacity, systems, technology, and resources necessary to serve its members effectively.

B. Strategic and Governance Support:
- Advise and support the Board of Directors, Officers, Committees/Workgroups, and volunteer leaders in carrying out their governance responsibilities.
- Provide professional expertise, analysis, and recommendations to assist the Board in strategic planning, policy development, and organizational decision-making.
- Implement and administer the policies, directives, and strategic priorities established by the Board of Directors.
- Keep the Board informed regarding significant operational, financial, legal, regulatory, and organizational matters affecting the Association.

C. Financial Stewardship:
- Provide executive oversight of the Association's financial affairs and ensure the prudent stewardship of its assets, resources, and long-term financial sustainability.
- Direct and oversee, in collaboration with professional finance staff, advisors, and the Finance Committee the development, implementation, and administration of the Association's annual budget and financial plans.
- Ensure that appropriate financial controls, accounting procedures, risk management practices, and financial accountability systems are established, maintained, and regularly reviewed by qualified staff and professionals.
- Support the Board of Directors and the Finance Committee in fulfilling its fiduciary responsibilities by providing timely, accurate, and relevant financial information, analysis, and recommendations.

D. Human Resources and Operational Management:
- The CEO shall have full authority and oversight over all Association staff, personnel matters, and day-to-day operations of the Association and shall be responsible for ensuring that the organization is effectively staffed, managed, and aligned with the strategic direction established by the Board of Directors.
- The CEO shall be responsible for the recruitment, employment, supervision, evaluation, development, compensation, discipline, and separation of Association employees, consistent with approved personnel policies and budgetary parameters.
- The CEO shall establish and maintain an organizational structure, staffing plan, and workplace culture that supports the effective achievement of the Association's mission, strategic objectives, and member service goals.
- The CEO shall promote professional development, succession planning, leadership growth, accountability, and organizational excellence throughout the Association.

E. External Relations:
- Represent the Association in relationships with members, industry partners, government agencies, community organizations, the California Association of REALTORS®, the National Association of REALTORS®, and other stakeholders as

appropriate.
- Promote and protect the interests, reputation, and strategic objectives of the Association.

F. Compliance and Risk Management:
- Ensure the Association conducts its affairs in compliance with applicable laws, regulations, governing documents, contractual obligations, and REALTOR® organization requirements.
- Identify and communicate significant risks to the Board of Directors and implement appropriate mitigation strategies.

G. Accountability:
- The CEO shall be accountable to the Board of Directors through the President and shall be evaluated in accordance with performance measures established by the Executive Committee, the CEO Employment Agreement, and the Association's Strategic Plan.
- The CEO is only subject to removal according to the express terms of his or her employment agreement with the Association. In the event of any conflict with any competing agreements or policies, the terms of such employment agreement shall control.

H. Secretary of the Association: Pursuant to the Bylaws, the Chief Executive Officer shall serve as Secretary of the Association unless otherwise determined by the Board of Directors. In the capacity of Secretary, the CEO shall:
- Maintain the official records of the Association and Board of Directors.
- Ensure that minutes and records of official actions are properly maintained and preserved.
- Oversee the preparation and distribution of notices, records, reports, and correspondence required by the Association's governing documents or applicable law.
- Perform such other duties as may be required by the Bylaws, Board of Directors, or applicable law.
- The Secretary position is a non-voting position.

1.16 C.A.R. Director

1.16.a Purpose and Role: The California Association of REALTORS® (C.A.R.) Director represents GLAR and its members at the state level. C.A.R. Directors are responsible for advancing policies, programs, and positions that protect property ownership, promote professionalism, and support the REALTOR® brand statewide.

Each year, GLAR appoints members to serve as C.A.R. Directors in accordance with the C.A.R. Bylaws and Model Association Requirements. The number of appointed Directors is determined annually by C.A.R. based on GLAR's REALTOR® membership count, as well as budgetary capacity and strategic priorities established by GLAR's Board of Directors.

1.16.b Duties and Responsibilities - C.A.R. Directors shall:
1. Attend all official C.A.R. business meetings, including C.A.R. Board of Directors meetings, Region 17 meetings, assigned committee meetings, and any required orientation sessions, briefings, training programs, caucuses, pre-meetings, post-meetings, or other activities associated with service as a C.A.R. Director.
2. Stay informed about C.A.R. policy initiatives, legislative priorities, and emerging issues that impact California REALTORS® and the industry.
3. Represent GLAR professionally and act as an ambassador for the Association's interests,

ensuring consistency between GLAR's Strategic Plan and C.A.R.'s statewide objectives.
4. Participate in regional caucuses, forums, and leadership sessions to strengthen collaboration among local associations and advance GLAR's position on state matters.
5. Comply with all applicable GLAR Bylaws, Policies and Procedures, Agreement to Serve requirements, travel and stipend policies, Code of Conduct, Social Media and Electronic Communications Policy, and other governance policies while representing GLAR at C.A.R. meetings, events, and activities, exercising professionalism, fiduciary responsibility, and sound judgment at all times.
6. Provide post-meeting reports or summaries to GLAR leadership when requested, ensuring knowledge-sharing and transparency.

1.16.c Appointment and Term of Service:

1. C.A.R. Directors are appointed annually by the GLAR Executive Committee and ratified by the Board of Directors, and serve a one-year term beginning January 1.
2. Reappointment is contingent upon performance, participation, budget availability, and continued eligibility.
3. Vacancies may be filled by the Executive Committee, subject to Board approval and the number of C.A.R. Director positions funded through the GLAR budget, to ensure appropriate representation at C.A.R. meetings.

1.16.d Composition – Automatic C.A.R. Directors: The following Association leaders shall automatically serve as Directors of the California Association of REALTORS® (C.A.R.), subject to meeting all applicable C.A.R. eligibility requirements and confirmation or certification requirements established by C.A.R.:

1) GLAR President
2) GLAR President-Elect
3) GLAR First Vice President
4) GLAR Treasurer
5) GLAR Immediate Past President
6) Region 1 Lead
7) Region 2 Lead
8) Region 3 Lead
9) Region 4 Lead
10) Region 5 Lead
11) Director(s)

Additional C.A.R. Director positions allocated to GLAR may be filled in accordance with Association policies and applicable C.A.R. requirements.

1.16.e Qualifications and Eligibility - To be eligible for appointment as a C.A.R. Director, a candidate must:

1. Be a REALTOR® member in good standing with GLAR and the California Department of Real Estate (DRE).
2. Have completed at least one full term (one calendar year) of active service—within the past three years—as a committee member, chair, vice chair, workgroup, task force member, or Board Director at the local, state, or national level.
3. Be actively engaged in the real estate industry, currently holding a valid real estate license and conducting business through sales, brokerage, property management, appraisal, or related professional services.
4. Demonstrate strong communication skills and the ability to represent GLAR's interests effectively in state-level discussions.
5. Maintain professionalism, ethical conduct, and availability to attend all required meetings

during the term.

1.16.f Reporting and Accountability:

1. Directors are expected to complete all C.A.R. Director reporting requirements as defined by GLAR policy, including attendance verification and submission of summary reports following each C.A.R. meeting cycle.
2. Failure to fulfill assigned duties—such as non-attendance, lack of engagement, or unprofessional conduct—may result in removal or non-reappointment at the discretion of the GLAR Board of Directors.

1.17 NAR Director

1.17.a Authority, Purpose, and Role: Authorized pursuant to the GLAR Bylaws and the National Association of REALTORS® (NAR) Bylaws, the NAR Director represents GLAR and its members within NAR's national governing body.

NAR Directors are entrusted with advancing NAR's mission to promote property ownership, protect the real estate industry, uphold the REALTOR® brand, and strengthen professionalism nationwide. They serve as a vital link between NAR's strategic governance and GLAR's local leadership, ensuring that national initiatives and policies reflect the needs of all members.

The number of NAR Director appointments allocated to GLAR is determined annually by NAR based on the Association's REALTOR® membership count and national apportionment formula.

1.17.b Duties and Responsibilities:

NAR Directors shall:

1. Attend all official NAR meetings, including Board of Directors sessions, Regional Caucuses, pre-meetings, post-meetings, assigned committee meetings, advisory group meetings, and any other meetings, briefings, orientations, training sessions, or activities pertinent to service as an NAR Director, fully participating in deliberations and exercising independent judgment in accordance with their fiduciary duty to NAR.
2. Remain informed on national legislative, policy, and regulatory issues affecting real estate professionals and property owners.
3. Represent GLAR and its members by voicing the collective interests of the Association and contributing local perspective to national discussions.
4. Report back to GLAR leadership following each NAR meeting cycle, summarizing actions taken, issues of concern, and opportunities for local implementation.
5. Communicate NAR initiatives and programs to members at the local level, connecting national strategy to GLAR's Strategic Plan.
6. Serve on at least one NAR committee, forum, or workgroup to stay informed on policy positions and emerging issues.
7. Exercise fiduciary responsibility by acting with due care, loyalty, and good faith in all deliberations and votes.
8. Comply with all applicable NAR and GLAR policies, including but not limited to Antitrust, Conflict of Interest, Harassment Prevention, Code of Conduct, Social Media and Electronic Communications, Confidentiality, and other governance, ethics, and leadership policies, and promptly disclose any actual, potential, or perceived conflicts of interest.
9. Adhere to all applicable GLAR, California Association of REALTORS® (C.A.R.), and National Association of REALTORS® (NAR) travel, attendance, stipend, and reimbursement policies, maintaining fiscal responsibility, accountability, and professional conduct.
10. Serve as an ambassador for the REALTOR® brand, modeling professionalism and ethics in all national activities.

1.17.c Selection, Appointment, and Term of Service:

1. Candidates for NAR Director shall be vetted and recommended by the GLAR Executive Committee and submitted to the Board of Directors for ratification.
2. All NAR Directors must concurrently serve as C.A.R. Directors.
3. NAR Directors typically serve two-year terms.
4. Vacancies may be filled by the Executive Committee and submitted to the Board of Directors for ratification to ensure full representation.
5. Appointments shall also consider budgetary capacity and strategic priorities to ensure responsible representation and financial stewardship.
6. The GLAR President shall automatically serve as an NAR Director during his or her term of office, subject to meeting all applicable eligibility, certification, and service requirements established by NAR.

1.17.d Qualifications and Eligibility:

To be eligible for appointment as an NAR Director, a candidate must:

1. Be a REALTOR® member in good standing with GLAR, C.A.R., and NAR.
2. Be actively engaged full-time in the business of real estate as an agent, manager, broker/owner, or in a related field.
3. Have served in a leadership capacity within NAR governance, a state or local REALTOR® association, or an NAR Institute, Society, or Council.
4. Complete all required NAR Fair Housing training prior to service, including:
    - At Home With Diversity® (AHWD) course
    - Bias Override: Overcoming Barriers to Fair Housing course
    - Fairhaven simulation training
5. Submit a written application outlining qualifications, service experience, and intended contributions to NAR's governance mission.
6. Demonstrate effective communication, leadership, and technology skills, and the ability to represent GLAR's interests at the national level.
7. Acknowledge and agree to abide by NAR's Volunteer Service Agreement and all applicable NAR policies.

1.17.e Performance Expectations:

During their term, each NAR Director shall:

1. Participate fully in all NAR Board and assigned committee meetings, remaining for the full duration of each session.
2. Complete NAR orientation and annual fiduciary refresher training.
3. Serve on at least one NAR committee, council, or workgroup during the appointment term.
4. Review all meeting materials in advance and be prepared to deliberate and vote.
5. Communicate regularly with GLAR's President, Board, and CEO regarding national matters affecting the Association.
6. NAR Directors shall comply with all attendance requirements established by the National Association of REALTORS® (NAR). Under the NAR Constitution, a Director who is absent from two (2) consecutive regular NAR Board of Directors meetings shall forfeit the office unless the absence is excused in accordance with NAR's governing documents. Directors serving multi-year terms are responsible for submitting any required written explanation to NAR for Board consideration in accordance with NAR policy.
7. Resign or be subject to removal for violation of fiduciary duty, conflict-of-interest, or harassment policies, or for failure to maintain active membership.

1.17.f Meetings, Attendance, and Travel

1. NAR Directors must be available to attend two (2) regular NAR Board of Directors

meetings each year, on dates and at locations determined by NAR.
2. Directors shall also attend all meetings of any NAR committees or advisory groups to which they are assigned.
3. Directors are expected to attend all meetings in their entirety; early departures require advance approval by the GLAR President.
4. GLAR-appointed NAR Directors may be eligible for funding, reimbursement, or stipends through the California Association of REALTORS® (C.A.R.) in accordance with applicable C.A.R. policies and requirements. Directors receiving such funding shall comply with all applicable C.A.R. attendance, participation, reporting, reimbursement, and eligibility requirements. Any supplemental funding provided by GLAR shall be determined through the annual budget process and applicable Association policies.
5. Travel, lodging, and per-diem reimbursements shall comply with GLAR's Financial and Travel Policies. Reimbursements constitute taxable income, and GLAR will issue IRS Form 1099 for total annual payments.
6. Directors are responsible for confirming their own lodging needs by stated deadlines; failure to do so transfers booking responsibility to the individual.
7. Directors are responsible for arranging their own travel.
8. The annual GLAR budget shall include funding for the President-Elect to attend designated NAR meetings, conferences, leadership sessions, orientations, and related activities as determined by the Association. The purpose of such funding is to support leadership development, provide exposure to NAR governance and operations, and prepare the President-Elect for service as GLAR President and as an automatic NAR Director during the subsequent year. The President-Elect is expected to actively pursue involvement in NAR governance and leadership opportunities, including applying for service on an NAR committee, advisory group, forum, or other volunteer body whenever reasonably available. If the President-Elect does not seek or obtain such service, they shall provide an explanation to the Executive Committee or Board of Directors upon request. The President-Elect shall comply with all applicable GLAR travel, reimbursement, conduct, confidentiality, and governance policies while representing the Association at NAR functions. Attendance at funded events shall be subject to budget availability and any requirements established by the Board of Directors or Chief Executive Officer.

1.17.g Reporting and Accountability

1. NAR Directors report to the GLAR President and Board of Directors through the Chief Executive Officer (CEO) or designated staff liaison.
2. Directors must submit post-meeting summaries after each NAR meeting cycle, outlining key decisions, policy updates, and items of relevance to GLAR.
3. GLAR will maintain official records of attendance, compliance, and training for all appointed NAR Directors.
4. Failure to fulfill duties—such as non-attendance, lack of engagement, or unprofessional conduct—may result in removal or non-reappointment at the discretion of the GLAR Board of Directors.

SECTION 2: ANNUAL ELECTION PROCESS & POLICIES

2.1 Election Process

2.1.a Leadership Candidate Requirements

In order to qualify as a candidate to serve as an Officer or local Director of GLAR, the following requirements must be fulfilled:

- Complete an Application Form by the deadline noted annually.
- Must attend a GLAR Candidate Orientation in the same calendar year as the election. All

candidates will attend a Candidate Orientation prior to the ballot being certified by the Board of Directors.
- Must attend an interview with the Nominating Committee.
- Any candidate for office must follow procedures as established by the Board of Directors.

2.2 Candidate Eligibility Requirements

2.2.a Candidate Eligibility Requirements for President-Elect

Eligibility Requirements:

- Must be a GLAR REALTOR® member in good standing.
- Must be actively engaged in the real estate business and hold an active California real estate license.

Experience Requirements (must meet at least two (2) of the following):

- Served as a GLAR Director for a minimum of two (2) years within the past three (3) years.
- Served on a GLAR Committee or Workgroup for a minimum of two (2) full years within the past five (5) years;
- Served as an Officer for a minimum of two (2) years with a recognized NAR industry partner organization (e.g., AREAA, CABREP, NAHREP, WCR, The LGBTQ+ Real Estate Alliance, NAREB, etc.), within the past five (5) years and in good standing;
- Served as a Director for a minimum of two (2) years at a local REALTOR® association;
- Served as President of a local REALTOR® association;
- Served as an Officer of a state REALTOR® association.

2.2.b Candidate Eligibility Requirements for First Vice President

Eligibility Requirements:

- Must be a GLAR REALTOR® member in good standing.

- Must be actively engaged in the real estate business and hold an active California real estate license.

Experience Requirements (must meet at least two (2) of the following):

- Served as a GLAR Director for a minimum of two (2) years within the past three (3) years.
- Served on a GLAR Committee or Workgroup for a minimum of two (2) full years within the past five (5) years;
- Served as an Officer for a minimum of two (2) years with a recognized NAR industry partner organization (e.g., AREAA, CABREP, NAHREP, WCR, The LGBTQ+ Real Estate Alliance, NAREB, etc.), within the past five (5) years and in good standing;
- Served as a Director for a minimum of two (2) years at a local REALTOR® association;
- Served as President of a local REALTOR® association;
- Served as an Officer of a state REALTOR® association.

2.2.c Candidate Eligibility Requirements for Treasurer

The appointed Treasurer shall possess demonstrated financial expertise and the ability to oversee the financial affairs of the Association in a fiduciary capacity. Relevant experience in budgeting, accounting, financial reporting, financial management, or related fields shall be considered by the Nominating Committee during the appointment process. Preference may be given to candidates with nonprofit, association, or business finance experience.

In addition, candidates should demonstrate one or more of the following qualifications:

- Professional experience in accounting, finance, banking, auditing, or financial oversight;

- Experience reviewing, analyzing, and interpreting financial statements (e.g., balance sheets, income statements, cash flow statements);
- Experience in budget development, financial forecasting, or reserve planning;
- Prior service in a financial oversight role (e.g., Treasurer, Finance Committee member, Audit Committee member) for a nonprofit, association, or business entity;
- Familiarity with internal controls, financial policies, and risk management practices;
- Understanding of fiduciary duties, including duty of care and duty of loyalty.

2.2.d Candidate Eligibility Requirements for Director

Eligibility Requirements:

- Must be a GLAR REALTOR® member in good standing.
- Must be actively engaged in the real estate business and hold an active California real estate license.
- Served on a GLAR Committee or Workgroup for a minimum of one (1) full year within the past two (2) years;

Leadership Experience (must meet at least one (1) of the following prior to taking office, in good standing):

- Graduated from the GLAR Leadership Academy within the past five (5) years;
- Served a minimum of one (1) year on the governing board (e.g., Board of Directors or equivalent leadership body) of a recognized NAR industry partner organization (e.g., AREAA, CABREP, NAHREP, WCR, The LGBTQ+ Real Estate Alliance, NAREB, etc.) within the past five (5) years and in good standing;
- Served as a Director for a minimum of two (2) years at a local REALTOR® association;
- Served as President of a local REALTOR® association;
- Served as an Officer of a state REALTOR® association.

2.3 Election of Officers and Directors

2.3.a Election Timeline

The Chief Executive Officer shall prepare and submit an annual Election Chronology to the Board of Directors for approval no later than March 1. The Election Chronology serves as the Association's official election schedule and shall establish the timeline for conducting the election process in accordance with the Association's Bylaws. At a minimum, the Election Chronology shall identify the opening and closing dates for candidate applications, the Nominating Committee review and interview period, Board consideration and ratification of the recommended slate, the petition period (if applicable), the distribution of the final candidate slate, the required candidate orientation, the member election (if required), and the announcement of election results. The Election Chronology shall provide for the election process to commence no later than March and conclude no later than the end of June of each year, unless otherwise required by the Board or the Association's Bylaws.

Adjustments to Election Chronology: Dates in the Election Chronology falling on a weekend, holiday, or Association office closure shall automatically move to the next business day. The Chief Executive Officer, in consultation with the President and Nominating Committee Chair, may otherwise adjust the Election Chronology for reasons beyond the Association's control, provided no notice, petition, or voting period required by the Bylaws is shortened, and the Board of Directors and affected candidates and members are notified as soon as practicable.

2.3.b Election Points of Policy

- Ballots shall contain the names of all qualified candidates listed in alphabetical order under the applicable office or director position.

- The ballot shall clearly state the number of candidates that may be selected for each office or position.
- REALTOR® Members in good standing who are eligible to vote pursuant to the Bylaws shall be entitled to vote in Association elections.
- Each eligible voting member shall receive an electronic ballot together with voting instructions.
- The Association shall maintain the official roster of eligible voters.
- Each eligible member shall be entitled to cast one (1) ballot. Proxy voting shall not be permitted.
- For Director positions, the candidate(s) receiving the highest number of votes corresponding to the number of available positions shall be declared elected.
- Election results shall be tabulated and announced in accordance with the Association's Election Chronology and applicable election procedures.
- In the event of a tie vote for any director position, a runoff election shall be conducted. Notice of the runoff election shall be provided to the affected candidates and membership within five (5) business days following certification of the election results. The runoff election shall be completed within thirty (30) days of the close of the original election unless otherwise directed by the Board of Directors.
- Electronic election records and results shall be retained for ninety (90) days following the election and may thereafter be destroyed provided no election challenge or objection has been filed.
- Any challenge to an election shall be submitted in writing to the Chief Executive Officer and the President within five (5) business days following the announcement of the election results and shall clearly specify the basis for the challenge.
- If a recount is authorized, the challenging party may request either a recount conducted by the appropriate Association body or an independent certified audit. If an independent audit is requested, the challenging party shall be responsible for all associated costs regardless of the outcome. The Association and challenging party must mutually agree upon the independent auditing firm.
- No candidate shall be declared elected until the election results have been certified in accordance with the Association's election procedures.

SECTION 3: COMMITTEE, WORKGROUP, AND TASK FORCE POLICIES

3.1 Authority & Purpose

Committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies of the Association are established pursuant to the Association Bylaws, these Policies and Procedures, actions of the Board of Directors, and, where applicable, the policies and requirements of the National Association of REALTORS® (NAR).

Such bodies serve in an advisory, educational, operational, or project-specific capacity as authorized by the Board of Directors and shall operate within the scope of authority established by the Board.

Committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies may be established, modified, suspended, or dissolved upon the recommendation of the Executive Committee and ratification by the Board of Directors, as necessary to support the mission and objectives of the Association.

3.1.a Purpose: The purpose of Association committees, workgroups, task forces, forums, and other volunteer bodies is to support the mission, strategic priorities, and objectives of the

Association through member engagement, subject matter expertise, leadership development, and collaborative problem-solving.

These bodies shall operate pursuant to a Board-approved business plan that supports and advances the Association's Strategic Plan. Business plans include goals, objectives, initiatives, performance measures, timelines, budgetary considerations, and recommendations for Association programs and services.

Committees and other volunteer bodies are responsible for carrying out the activities and priorities assigned to them within the scope of their approved business plan and allocated resources. Committees, workgroups, task forces, forums, and other volunteer bodies shall provide research, recommendations, subject matter expertise, and member perspectives to assist the Board of Directors and Association leadership in achieving the objectives of the Strategic Plan.

Unless specifically authorized by the Board of Directors, committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies shall not establish Association policy, commit Association resources beyond approved budgets, enter into contractual obligations, or act on behalf of the Association.

3.2 Participation and Service Standards

3.2.a Eligibility: Members serving on committees, workgroups, task forces, forums, advisory groups, or other volunteer bodies shall be active members in good standing of the Association and shall satisfy any qualifications established by the Bylaws, Policies and Procedures, governing documents, or Board of Directors.

Volunteer service is a privilege of membership and not a right.

3.2.b Recruitment and Appointment Process: GLAR shall conduct an annual open enrollment and appointment process for committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies.

- Members interested in serving shall submit an application in the form and manner established by GLAR.
- Applications may include committee preferences, qualifications, leadership experience, areas of interest, and other information relevant to the appointment process.
- Applications shall be reviewed by the outgoing and incoming volunteer leadership of the applicable committee, workgroup, task force, forum, or volunteer body together with the assigned Staff Liaison.
- Recommendations shall be compiled and submitted to the Board of Directors for approval.
- Appointments shall be made with consideration given to member interest, qualifications, experience, leadership development, diversity of perspectives, continuity, strategic priorities, and the needs of the Association.

The Board of Directors shall have final authority regarding appointments to committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies.

The Chief Executive Officer may establish administrative procedures, application timelines, appointment deadlines, orientation requirements, and related processes to facilitate the annual appointment process.

3.2.c Terms of Service: Unless otherwise specified by the Bylaws, Policies and Procedures,

governing documents, or applicable law, appointments to committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies shall be for a one-year term. Members may reapply annually for additional terms.

The Association may establish staggered terms, term limits, qualifications, or special appointment procedures for specific volunteer bodies as required.

3.2.d Meeting Conduct and Confidentiality: Meetings of committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies shall be conducted in accordance with Association policies and any applicable confidentiality requirements.

To encourage open discussion, protect confidential information, and preserve the integrity of Association deliberations, meetings shall not be audio recorded, video recorded, live streamed, screen captured for recording purposes, or otherwise electronically recorded unless expressly authorized by the Chief Executive Officer or required by law.

For virtual meetings conducted through Zoom, Microsoft Teams, Google Meet, Webex, or similar platforms, participants shall not activate meeting recording features, artificial intelligence (AI) meeting assistants, transcription services, note-taking bots, automated meeting summaries, AI companions, or similar technologies, including but not limited to Zoom AI Companion, Otter, Fireflies, Fathom, Read.ai, Microsoft Copilot, Gemini, or comparable applications, unless expressly authorized by the Chief Executive Officer. Participants shall have their camera enabled and remain visibly on camera for the duration of the meeting. Failure to do so may result in removal from the meeting.

Virtual meeting chat functions shall be disabled unless specifically enabled by the Staff Liaison or meeting facilitator for administrative purposes.

Official meeting minutes and records shall be prepared and maintained by the assigned Staff Liaison in accordance with Association policies and record retention requirements.

Any unauthorized recording, transcription, capture, retention, distribution of meeting content, or use of prohibited AI tools is prohibited. This prohibition includes the use of secondary devices, applications, software, cameras, microphones, screen-recording tools, mobile devices, smart watches, or other technologies capable of recording, transcribing, capturing, monitoring, or distributing meeting content. Violations may result in removal from the meeting, removal from the volunteer body, suspension of participation privileges, or other action deemed appropriate by the Association.

3.3 Types of Volunteer Bodies

3.3.a Standing Committees: Standing Committees are established to perform continuing functions necessary to the ongoing operations, programs, and strategic objectives of the Association.
Standing Committees of the Association include:

- Executive Committee
- Finance Committee
- Government Affairs Committee
- Grievance Committee
- Professional Standards Committee

Additional Standing Committees may be established, modified, consolidated, or discontinued by the Board of Directors as deemed necessary to support the Association's mission, governance responsibilities, and strategic objectives.

3.3.b Workgroups: Workgroups are established to focus on specific operational, programmatic, educational, or strategic initiatives and may be ongoing or project-based in nature.

3.3.c Task Forces: Task Forces are temporary volunteer bodies established to address a specific issue, objective, project, recommendation, or assignment. Task Forces shall be dissolved upon completion of their assigned purpose unless otherwise extended by the Board of Directors or President.

3.3.d Advisory Groups, Forums, and Other Volunteer Bodies: The President or Board of Directors may establish advisory groups, forums, councils, or other volunteer bodies as necessary to support Association objectives.

3.4 Volunteer Leadership Roles

3.4.a Committee Chair: The Committee Chair facilitates meetings, provides leadership to the committee, oversees implementation of the committee business plan, and serves as the primary volunteer leader of the committee.

The Chair shall remain impartial while presiding and, consistent with the principles of Robert's Rules of Order, shall facilitate discussion rather than participate in deliberation or vote on matters before the committee.

3.4.b Committee Vice Chair: The Vice Chair shall assist the Chair and assume the responsibilities of the Chair when the Chair is absent or otherwise unable to serve.

3.4.c Workgroup Lead: The Workgroup Lead serves as the primary volunteer leader of the workgroup and is responsible for facilitating meetings, coordinating activities, and advancing assigned objectives.

The Workgroup Lead shall remain impartial while facilitating meetings and shall not vote or participate in deliberation while presiding.

3.4.d Director Liaison: Director Liaisons shall be appointed by the President and approved by the Board of Directors. Director Liaisons serve as non-voting participants and provide communication and coordination between the Board of Directors and the volunteer body.

3.4.e Staff Liaison: Staff Liaisons shall be designated by the Chief Executive Officer. Staff Liaisons serve as non-voting participants and are responsible for administrative support, including preparation of meeting agendas, distribution of notices and communications, preparation and retention of meeting minutes, maintenance of records, and coordination of committee activities.

3.4.f Annual Training Requirement: Committee Chairs, Vice Chairs, Workgroup Leads, Director Liaisons, Staff Liaisons, and other volunteer leaders designated by the Association shall attend annual onboarding and leadership training as required by GLAR.

3.4.g Selection of Committee Chairs, Vice Chairs, and Workgroup Leads: Committee Chairs, Committee Vice Chairs, RAC Leads, and Workgroup Leads shall be selected through a collaborative process led by the incoming Executive Committee. The incoming Executive

Committee shall review and discuss recommended appointments for these positions and shall agree upon the recommended Committee Chairs, Vice Chairs, and Workgroup Leads. The Executive Committee's recommendations shall be forwarded to the Board of Directors for ratification. This collaborative process is intended to support leadership continuity, including the expectation that Vice Chairs will, in most cases, advance to serve as Chair of the same committee in the following year.

3.5 Quorum

A quorum for any committee, workgroup, task force, forum, advisory group, or other volunteer body shall consist of fifty-one percent (51%) of its appointed voting members, rounded up to the next whole number, unless otherwise established by the Board of Directors.

Only appointed voting members shall be counted in determining the presence of a quorum. Ex-officio members, Director Liaisons, Staff Liaisons, guests, and other non-voting participants shall not be counted toward quorum and shall have no voting rights unless otherwise provided in the Bylaws, policies, or specifically authorized by the Board of Directors.

No official business, recommendations, or votes shall be conducted in the absence of a quorum, except for actions necessary to adjourn, recess, or reschedule a meeting.

3.6 Attendance

Volunteer leaders and members are expected to actively participate in the meetings and activities of the committees, workgroups, task forces, forums, advisory groups, Presidential Advisory Groups (PAGs), and other volunteer bodies to which they are appointed.

Any appointed member of a Standing Committee who misses three (3) meetings during a calendar year shall be deemed to have resigned and shall be automatically removed from the committee roster.

Any appointed member of a special committee, workgroup, task force, forum, advisory group, Presidential Advisory Group (PAG), or other volunteer body who misses two (2) meetings during the term of the appointment shall be deemed to have resigned and shall be automatically removed from the roster.

Appointments to committees, workgroups, task forces, forums, advisory groups, Presidential Advisory Groups (PAGs), and other volunteer bodies are made on an annual basis unless otherwise specified by the Board of Directors.

3.7 Participation and Service Standards

- Individuals serving on Association committees, workgroups, task forces, forums, advisory groups, and other volunteer bodies shall be active Members in good standing of the Association, unless otherwise authorized by the Board of Directors or these Policies and Procedures.
- Eligibility to serve on a specific committee, workgroup, task force, forum, advisory group, or other volunteer body shall be determined by the Board of Directors, these Policies and Procedures, and any applicable qualifications established for that body.
- All individuals serving in a volunteer leadership capacity shall execute and comply with the Association's Agreement to Serve and any other governance documents required by the Board of Directors as a condition of service.

- The President shall serve as an ex-officio, non-voting member of all Association committees, workgroups, task forces, forums, and advisory groups, with the right to attend and participate in discussions.
- Volunteer leaders and participants serve without compensation and shall not receive payment from the Association for their services, expertise, products, or participation unless expressly authorized by the Board of Directors.
- Volunteer leaders and participants shall not use their position, title, committee assignment, or Association resources to market, solicit, endorse, or promote personal, professional, or commercial interests.
- All volunteer leaders and participants shall conduct themselves in a professional, ethical, and respectful manner consistent with the Association's governing documents, Code of Conduct, and REALTOR® Code of Ethics, where applicable.

3.8 Volunteer Leadership Roles

3.8.a Committee Chair Role & Duties

- Must be an active Member in good standing.
- Must meet any qualifications established by the Board of Directors for the applicable committee.
- Must execute the Association's Agreement to Serve and complete any required leadership orientation or training.
- Provide leadership to the committee and ensure its activities support the Association's Strategic Plan and approved business plan.
- Preside over committee meetings and facilitate productive discussion and decision-making.
- While presiding, the Chair shall serve as a facilitator of discussion and consensus-building and shall not participate in debate or vote on committee matters except in the event of a tie vote, in accordance with Robert's Rules of Order, or as otherwise authorized by the Board of Directors.
- Work collaboratively with the Director Liaison, Staff Liaison, and Association leadership to advance approved goals, initiatives, and budgeted activities.
- Report committee activities, recommendations, and progress as requested by the Board of Directors or Association leadership.
- Perform such other duties as may be assigned by the President or Board of Directors.

3.8.b Committee Vice Chair Role & Duties

- Must be an active Member in good standing.
- Must meet any qualifications established by the Board of Directors for the applicable committee.
- Must execute the Association's Agreement to Serve and complete any required leadership orientation or training.
- Assist the Committee Chair in carrying out the responsibilities of the committee.
- Perform the duties of the Chair in the Chair's absence or inability to serve.
- Support the successful implementation of the committee's approved business plan and objectives.
- Perform such other duties as may be assigned by the Chair, President, or Board of Directors.

3.8.c Workgroup Lead Role & Duties

- Lead the workgroup in carrying out its assigned purpose, objectives, and deliverables.
- Preside over and facilitate workgroup meetings in a fair, impartial, and efficient manner.

- While presiding, the Workgroup Lead shall serve as a facilitator of discussion and consensus-building and shall not participate in debate or vote on workgroup matters except in the event of a tie vote, accordance with Robert's Rules of Order, or as otherwise authorized by the Board of Directors.
- Coordinate activities in support of the Association's Strategic Plan and approved business plan.
- Communicate progress, recommendations, and outcomes to the appropriate committee, Director Liaison, Staff Liaison, or Board of Directors.
- Perform such other duties as may be assigned by the President or Board of Directors.

3.8.d Director Liaison Role & Duties

- Director Liaisons shall be appointed by the President.
- Director Liaisons shall be current members of the Board of Directors.
- Serve as a communication link between the Board of Directors and the assigned committee, workgroup, task force, forum, or advisory group.
- Provide guidance regarding Board priorities, Strategic Plan objectives, and governance considerations.
- Support volunteer leaders in achieving approved goals and business plan objectives.
- Attend meetings as practical and serve as a resource to the volunteer body.
- Director Liaisons shall be non-voting participants and shall not be counted toward quorum.

3.8.e Staff Liaison Role & Duties

- Staff Liaisons shall be assigned by the Chief Executive Officer.
- Provide administrative, operational, and professional staff support to the assigned committee, workgroup, task force, forum, advisory group, or other volunteer body.
- In collaboration with the Chair or Workgroup Lead, prepare and distribute meeting agendas and supporting materials.
- Serve as the official source for all committee, workgroup, task force, forum, and advisory group communications, including meeting notices, correspondence, reports, and related communications.
- Record, maintain, and distribute meeting minutes and other official records of the volunteer body.
- Assist with meeting planning, scheduling, logistics, implementation of approved initiatives, and coordination of Association resources.
- Support volunteer leaders in achieving approved goals, business plans, budgets, and Strategic Plan objectives.
- Serve as a resource regarding Association policies, procedures, operations, and organizational priorities.
- Staff Liaisons shall be non-voting participants and shall not be counted toward quorum.

3.8.f Responsibilities of Volunteer Members: All volunteer members are expected to actively support the mission, Strategic Plan, business objectives, and goals of the Association through their participation and service.

Volunteer members shall:

- Act in the best interests of the Association and its membership and avoid using their position for personal, professional, political, or financial gain.
- Conduct themselves in a professional, respectful, ethical, and collaborative manner consistent with the Association's governing documents, Code of Conduct, and REALTOR® Code of Ethics, where applicable.

- Attend meetings, prepare in advance, review relevant materials, and actively participate in discussions and activities.
- Support the approved business plan, goals, initiatives, and recommendations of the committee, workgroup, task force, forum, advisory group, or other volunteer body to which they are appointed.
- Respect differing viewpoints, engage in constructive dialogue, and contribute to informed decision-making and problem-solving.
- Complete assignments and commitments accepted in support of the volunteer body's objectives and activities.
- Respond to Association communications in a timely manner and keep volunteer leaders and staff informed regarding their ability to participate in meetings and assigned activities.
- Maintain the confidentiality of information designated as confidential by the Association, the Board of Directors, or the volunteer body.
- Comply with the Association's Agreement to Serve and all applicable policies, procedures, and governing documents.

SECTION 4: REGIONAL STRUCTURE AND REGIONAL ADVOCACY COUNCIL (RAC)

4.1 Purpose

The Association shall maintain geographic Regions to support member engagement, grassroots advocacy, leadership development, community outreach, and communication throughout the Association's service area.

Regions are intended to strengthen REALTOR® participation in public policy matters, identify local issues impacting real estate and property ownership, and provide a structured mechanism for communication between members and Association leadership.

Regional participation does not constitute representation on the Board of Directors and does not create any governance authority independent of the Board of Directors.

4.2 Establishment of Regions

The Association shall maintain five (5) geographic Regions as established by the Board of Directors:

- Region 1 – Beaches
- Region 2 – Culver City
- Region 3 – Beverly Hills
- Region 4 – West Hollywood
- Region 5 – Downtown/East Los Angeles

Regional boundaries may be modified by the Board of Directors as necessary to reflect membership distribution, jurisdictional changes, advocacy priorities, or organizational needs.

4.3 Regional Advocacy Council (RAC)

The Regional Advocacy Council ("RAC") is established as a standing advocacy body of the Association operating under the direction of the Government Affairs Committee.

The RAC serves as the Association's grassroots advocacy network and is responsible for identifying local policy issues, facilitating community engagement, supporting advocacy initiatives, and communicating regional perspectives to the Government Affairs Committee.

The RAC shall consist of:

- One (1) RAC Lead
- One (1) Regional Representative from each Association Region.

The RAC may establish workgroups, outreach initiatives, and regional projects as authorized by the Government Affairs Committee.

4.3.a RAC Lead: The Vice Chair of the Government Affairs Committee shall also serve as the Regional Advocacy Council (RAC) Lead and shall provide leadership, coordination, and oversight of the Regional Advocacy Councils and their activities.

The RAC Lead shall:

- Preside over RAC meetings.
- Coordinate the activities of Regional Representatives.
- Serve as liaison between the RAC and the Government Affairs Committee.
- Present reports and recommendations to the Government Affairs Committee.
- Assist in the development and implementation of advocacy initiatives and regional engagement efforts.
- Support leadership development and mentorship of Regional Representatives.

As Vice Chair of the Government Affairs Committee, the RAC Lead shall be selected in accordance with the collaborative Executive Committee process described in Section 3.4.g of these Policies and Procedures and ratified by the Board of Directors.

4.3.b Regional Representatives: Each Region shall be represented by one (1) Regional Representative.
Regional Representatives serve as grassroots advocacy liaisons and are responsible for:

- Monitoring local governmental, housing, land use, taxation, and real estate issues.
- Building relationships with local elected officials, community organizations, neighborhood councils, and stakeholders.
- Supporting REALTOR® Calls for Action and advocacy campaigns.
- Encouraging member participation in advocacy efforts and community engagement activities.
- Providing reports regarding issues and activities occurring within their Region.
- Supporting implementation of the RAC business plan and strategic objectives.

Regional Representatives do not serve as Directors of the Association and possess no governance authority except as specifically delegated through the RAC and Government Affairs Committee.

4.3.c Appointment and Terms: The RAC Lead shall be selected in accordance with Section 3.4.g of these Policies and Procedures. Regional Representatives shall be selected in accordance with the collaborative Executive Committee process described in Section 3.4.g of these Policies and Procedures and ratified by the Board of Directors.

Appointments shall be based upon demonstrated interest in advocacy, leadership ability, community involvement, and commitment to the Association's mission and strategic priorities. Individuals serving as Regional Representatives may serve up to three (3) consecutive one-year terms. Following a one-year absence from service in that position, an individual may again be eligible for appointment.

All RAC appointees shall execute the Association's Agreement to Serve and complete any required leadership orientation or training.

4.3.d Reporting and Accountability: Regional Representatives shall provide regular reports to the RAC Lead regarding advocacy activities, community engagement efforts, and issues affecting their Region.

The RAC Lead shall provide periodic reports to the Government Affairs Committee.

Recommendations requiring Association action shall be transmitted through the Government Affairs Committee and, when appropriate, forwarded to the Board of Directors.

4.3.e Relationship to Government Affairs Committee: The RAC operates under the direction of the Government Affairs Committee.

The Government Affairs Committee shall review RAC reports, consider recommendations, and determine whether matters should be elevated to the Board of Directors.

4.3.f Strategic Alignment: The RAC shall support the Association's Strategic Plan, advocacy objectives, housing policy priorities, and community engagement initiatives. All RAC activities shall be consistent with the policies, positions, and objectives established by the Board of Directors.

SECTION 5: FINANCIAL POLICIES & GUIDELINES

5.1 Purpose and Fiduciary Responsibility

The purpose of these Financial Policies and Guidelines is to ensure the financial integrity, accountability, transparency, and long-term sustainability of GLAR.

The Board of Directors retains ultimate fiduciary responsibility for the management, oversight, and stewardship of all Association assets and financial resources.

These policies establish the framework for financial governance, internal controls, budgeting, investments, reserves, expenditures, reporting, audits, and fraud prevention.

The Finance Committee shall review these policies annually and recommend amendments to the Board of Directors as necessary.

5.1.a Finance Committee Composition: The Finance Committee shall consist of the Treasurer, who shall serve as Chair, the remaining Officers of the Association, and no more than six (6) additional REALTOR® members. The additional REALTOR® members shall be selected in accordance with the collaborative Executive Committee appointment process described in Section 3.4.g of these Policies & Procedures and ratified by the Board of Directors. As provided in Section 3.7, the President serves as an ex-officio, non-voting member of the Finance Committee, as with all Association committees. The Chief Executive Officer, and such accounting or staff as the CEO may designate, shall support the Finance Committee in a non-voting staff liaison capacity by providing financial information, analysis, and administrative support.

5.2 Accounting and Financial Reporting

5.2.a Accounting Method: The Association shall maintain its financial records using accrual-based accounting principles in accordance with Generally Accepted Accounting Principles (GAAP).

5.2.b Financial Reports: Monthly financial reports shall be prepared and presented to the Finance

Committee and Board of Directors and shall include:

- Statement of Financial Position
- Statement of Activities
- Budget-to-Actual Comparison
- Cash and Investment Summary
- Reserve Fund Summary

5.2.c Financial Review: The Treasurer shall meet regularly with the appropriate finance staff and/or Chief Executive Officer (CEO) to review the Association's monthly financial statements and financial performance. Significant variances, trends, or concerns shall be reviewed by the Finance Committee, which shall report its findings and recommendations to the Board of Directors.

5.3 Budget Development and Approval

5.3.a Strategic Planning: The annual budget shall support the Association's Strategic Plan and annual business objectives.

5.3.b Budget Calendar: The following annual budget cycle shall be observed.

March–April	Strategic Planning Process (Development or Review, as Applicable)
May	Board Approval of Strategic Plan
June	Committee and Workgroup Business Plan Development and Deadline
July–August	Department and Committee Budget Development Relating to Business Plans
August	Membership Revenue Projections Established
September	Finance Committee Budget Discussions and Review
October	Budget Refinement and Executive Review
November	Board Review and Amendments
December	Final Budget Approval

5.3.c Budget Approval: The Board of Directors shall approve the annual operating budget no later than December preceding the fiscal year.

5.4 Banking, Cash Management, and Internal Controls

5.4.a Depositories: Association funds shall be maintained in federally insured financial institutions approved by the Board of Directors.

5.4.b Authorized Accounts: The CEO is authorized to establish, maintain, and close banking and investment accounts subject to Board authorization.

5.4.c Cash Controls: Appropriate segregation of duties shall be maintained regarding:

- Deposits
- Disbursements
- Reconciliations
- Financial reporting

5.4.d Reconciliations: All bank accounts shall be reconciled monthly and reviewed by the CEO and Treasurer.

5.4.e Electronic Transfer Reporting: Any electronic transfer or disbursement exceeding $25,000 that is unbudgeted or outside the ordinary course of Association operations shall be reported in writing to all authorized signers within one business day following completion of the transaction.

The written notice shall include the amount, date, recipient or destination, purpose of the transaction, and the reason the transaction was unbudgeted or outside normal operations.

The transaction shall also be reported to the Finance Committee at its next regularly scheduled meeting.

This reporting requirement shall not apply to transactions that are included in the approved budget and occur in the ordinary course of Association operations, or to transfers specifically authorized by an existing Board-approved policy, motion, or resolution.

The reporting requirements of this section do not replace or supersede any expenditure approval required under Section 5.6.

5.5 Signature Authority

5.5.a Authorized Signers: The following individuals shall be authorized signers:

- Chief Executive Officer
- President
- Treasurer

5.6 Expenditure Authority

5.6.a Budgeted Expenditures: The CEO may authorize expenditures within the approved annual budget.

5.6.b Non-Budgeted Expenditures: The following approval authority shall apply to expenditures not included in the approved annual budget:

Authority Level	Amount
CEO	Up to $5,000
Executive Committee	$5,001 – $15,000
Board of Directors	Over $15,000

Expenditures that materially exceed the approved budgeted amount shall be treated as non-budgeted expenditures unless otherwise authorized by the Board.

5.6.c Contracts and Agreements: The CEO or designated staff assigned by the CEO is authorized to execute contracts and agreements on behalf of the Association consistent with the approved budget and expenditure authority established in this Policy.

Contracts involving expenditures requiring Executive Committee or Board approval shall not be executed until the appropriate approval has been obtained.

All contracts shall be signed by the CEO. In the CEO's absence or unavailability, the CEO may delegate contract execution authority in writing to a designated member of the Association's finance staff or management team. Such delegation shall specify the scope and duration of the authority granted and shall be maintained in the Association's records.

5.6.d Procurement and Competitive Quotes: Purchases or contracts exceeding $10,000 should, when practical, be supported by competitive quotes or proposals. The CEO may waive this

requirement when a sole-source vendor, time-sensitive need, specialized service, or continuity of service justifies the exception. Any such exception shall be documented.

5.7 Credit Cards

Association credit cards may be issued to designated staff members authorized by the CEO and shall be used solely for legitimate Association business purposes. Credit card limits shall be established and authorized by the CEO based on business need. Cardholders are responsible for submitting receipts and supporting documentation for all charges in accordance with Association procedures. Receipts are required for all credit card charges whenever available; however, the receipt requirement may be waived for charges under $10.00, provided the business purpose of the charge is documented. Credit card activity shall be reviewed regularly by the Accounting Department and periodically by the Finance Committee to ensure compliance with this Policy.

5.8 Reserve Policy

GLAR shall maintain unrestricted operating reserves equal to a minimum of six (6) months and a target of twelve (12) months of operating expenses. Reserve funds are intended to manage unexpected revenue fluctuations, address emergencies, fund strategic opportunities, and protect the continuity of Association operations. Use of reserve funds for purposes not included in the approved budget shall require prior approval of the Board of Directors.

5.9 Investment Policy

5.9.a Objectives: Association investments shall prioritize:

1. Preservation of Capital
2. Liquidity
3. Diversification
4. Reasonable Return

5.9.b Permitted Investments: Association funds may be invested in:

- FDIC-insured accounts
- Certificates of Deposit
- U.S. Treasury Securities
- High-quality fixed income securities
- Professionally managed mutual funds, exchange-traded funds (“ETFs”), or investment portfolios, provided they are consistent with the Association’s objectives of capital preservation, liquidity, diversification, and reasonable return and are subject to Finance Committee oversight.

5.9.c Prohibited Investments: Association funds shall not be invested in speculative, leveraged, or excessively risky instruments, including leveraged or inverse ETFs.

5.9.d Oversight: The Finance Committee shall review investment performance at least twice annually.

5.10 Audit and Independent Review

The Association shall maintain financial policies, internal controls, accounting practices, and oversight procedures designed to protect Association assets and ensure the fiscal integrity of its operations.

An independent Certified Public Accountant shall perform an annual financial review or audit as directed by the Board of Directors. The level of financial engagement shall meet or exceed all applicable National Association of REALTORS® (NAR) Core Standards requirements.

A full independent audit shall be conducted upon the departure, resignation, termination, retirement, or other separation of the Chief Executive Officer.

Any findings, recommendations, or management letter comments resulting from the review or audit shall be reviewed by the Finance Committee and reported to the Board of Directors, together with any recommended corrective actions.

The Association shall maintain compliance with all applicable NAR Core Standards relating to financial solvency, financial reporting, and fiscal accountability.

In the event the Association considers bankruptcy protection, insolvency proceedings, dissolution, or similar actions affecting the Association's financial viability, the Board of Directors and Chief Executive Officer shall comply with all notification, approval, and reporting requirements established by NAR, C.A.R., applicable law, and the Association's governing documents.

5.11 Fraud Prevention and Whistleblower Protection

5.11.a Zero-Tolerance Policy: GLAR maintains a zero-tolerance policy regarding fraud, theft, embezzlement, misuse of assets, or financial misconduct.

5.11.b Reporting: Any Director, officer, committee member, volunteer, employee, contractor, or member who suspects financial misconduct shall report the matter immediately to the CEO, Treasurer, and President. If the suspected misconduct involves any of those individuals, the report shall be made to another uninvolved officer or Director, or, if no such person is available, directly to the Association’s legal counsel.

5.11.c Investigations: Reports of misconduct shall be investigated promptly and confidentially.

5.11.d Whistleblower Protection: No person reporting suspected misconduct in good faith shall be subject to retaliation, adverse treatment, or any other form of reprisal. Reports made in good faith shall remain protected regardless of whether the allegations are ultimately substantiated. However, knowingly false, malicious, or bad-faith reports are prohibited and may result in disciplinary action, up to and including removal from a volunteer position, or other appropriate action, as applicable.

5.12 Membership Dues and Fees

5.12.a Establishment of Fees: Membership dues, application fees, transfer fees, and other charges shall be established by the Board of Directors.

5.12.b Billing: Annual membership dues and/or fees shall be invoiced in accordance with Board-approved schedules.

5.12.c Delinquency: Late fees, reinstatement fees, suspension, and termination procedures shall comply with Association Bylaws and applicable NAR and C.A.R. requirements.

5.12.d Refunds: Membership dues and fees are non-refundable.

5.13 Travel and Reimbursement

5.13.a Authorization: Association-related travel shall be conducted in accordance with the Association's approved annual budget and Travel and Reimbursement Policy.

Travel by staff shall be authorized by the Chief Executive Officer or designee. Travel by Officers, Directors, volunteer leaders, and other authorized representatives shall be permitted when included within the approved budget, approved program of work, or otherwise authorized pursuant to these Policies and Procedures.

Travel not included within the approved budget or exceeding established budgetary limits shall require additional authorization as determined by the Chief Executive Officer, Executive Committee, or Board of Directors, as applicable.

5.13.b Reimbursable Expenses: Eligible expenses may include:

- Per Diem
- Transportation
- Airfare
- Lodging
- Mileage
- Registration fees

5.13.c Documentation: Reimbursement requests shall be submitted within thirty (30) days and supported by receipts when requested.

5.13.d Mileage: Personal vehicle use shall be reimbursed at the then current IRS mileage rate.

5.14 Complimentary Registration and Event Attendance

To support volunteer leadership engagement, representation of the Association, and participation in industry activities, Officers and Directors may be provided complimentary registration or admission to GLAR-sponsored events, programs, classes, meetings, and other Association functions, subject to budget availability and approved financial policies.

Complimentary registration, admission, or attendance for Officers and Directors at industry events, conferences, meetings, or functions may be provided when such attendance supports the mission, Strategic Plan, advocacy efforts, leadership development, or business objectives of GLAR and is included within the approved annual budget.

The Chief Executive Officer may establish administrative procedures governing eligibility, registration, reimbursement, guest attendance, and other related matters consistent with approved budgets and Association policy.

Nothing in this policy shall obligate GLAR to provide complimentary registration, admission, travel reimbursement, or event attendance benefits for any specific event or activity.

5.15 Record Retention and Transparency

Financial records shall be maintained in accordance with the Association’s Record Retention Policy and applicable law. The Association shall maintain transparency and provide access to records as required by law, the Bylaws, and adopted policies.

5.16 Annual Review and Amendments

The Finance Committee, in consultation with the Chief Executive Officer and such accounting and finance staff as the CEO may designate, shall review these Financial Policies annually and recommend any necessary revisions to the Board of Directors. These Financial Policies may be amended only by action of the Board of Directors.

SECTION 6: MEMBERSHIP POLICIES

6.1 Membership Management and Compliance

6.1.a Broker Affiliation Changes: All changes in member affiliation shall be submitted to the Association in writing within thirty (30) days of the change. The Association shall maintain forms and procedures for adding, transferring, or terminating membership affiliations.

6.1.b Designated REALTOR® Compliance: The Association shall administer Designated REALTOR® membership obligations, the Variable Dues Formula, and related membership requirements in accordance with applicable NAR, C.A.R., Association Bylaws, and Association policy requirements.

Designated REALTORS® (DRs) shall be responsible for complying with all applicable NAR and C.A.R. membership requirements, including payment of REALTOR® dues or applicable non-member assessments for affiliated licensees.

6.1.c Non-Member Assessment: If any licensee affiliated with a Designated REALTOR® chooses not to become a REALTOR®, the Designated REALTOR® shall be responsible for any applicable non-member assessments as established by NAR, C.A.R., and the Association. Non-member licensees shall not receive REALTOR® membership benefits and may not use the REALTOR® marks.

6.1.d Limited Function Referral Office (LFRO) Exemption: Licensees affiliated with a separately established Limited Function Referral Office (LFRO) may be exempt from REALTOR® dues and non-member assessments as permitted by NAR policy, subject to submission of required certification forms and verification by the Association.

6.1.e Mortgage Loan Originator (MLO) Exemption: Mortgage Loan Originator (MLO) licensees may be exempt from REALTOR® dues and non-member assessments as permitted by NAR policy, subject to submission of required certifications and supporting documentation and verification by the Association.

6.1.f Commercial Certification: Commercial brokerage offices may qualify for exemption from certain non-member assessments as permitted by NAR policy and upon submission of the required certifications and documentation.

6.1.g New Member Onboarding and Training Requirements: Applicants for REALTOR® membership shall complete all orientation, ethics, fair housing, and any additional membership requirements established by the Association, NAR, and C.A.R. within the prescribed timeframes.

Any former member reapplying for membership may receive credit for previously completed onboarding or orientation requirements if the course was completed within one (1) year of reapplication and the former member was not terminated while not in good standing.

New members shall provide proof of completion of required training as required by the Association.

6.1.h Membership Induction: New REALTOR® members may be formally recognized or inducted at an orientation/onboarding program, membership event, or other Association function as determined by the Association.

6.1.j i Solicitation and Recruitment: Solicitation or recruitment activities that interfere with Association programs, meetings, classes, events, or official functions are prohibited.

Recruiting or soliciting licensees for employment, affiliation, or transfer to another brokerage during Association-sponsored programs, meetings, classes, events, or official functions is prohibited unless expressly authorized by the Association.

GLAR reserves the right to reject, suspend, terminate, deny renewal of, or otherwise take action regarding any membership in accordance with its Bylaws, Policies and Procedures, and applicable law.

SECTION 7: EVENTS

7.1 Sponsorships

7.1.a Purpose: Sponsorships provide financial and in-kind support for GLAR programs, events, education, advocacy efforts, publications, initiatives, and member services. Sponsorship may include the provision of funds, advertising, promotional opportunities, products, services, materials, awards, exhibits, or other items of value associated with an Association activity or initiative.

7.1.b Opportunities: GLAR may establish sponsorship opportunities, eligibility requirements, pricing, benefits, limitations, application procedures, and recognition programs for Association events, programs, classes, publications, activities, and initiatives.

Sponsorship opportunities may be limited and allocated in accordance with procedures established by GLAR.

The Chief Executive Officer shall have authority to administer sponsorship programs, establish sponsorship packages, and execute sponsorship agreements consistent with approved budgets, policies, and strategic objectives.

Sponsors shall comply with all applicable GLAR policies, event requirements, venue requirements, and applicable laws and regulations.

Sponsorship of a GLAR event, program, publication, activity, or initiative does not constitute an endorsement by GLAR of any sponsor, product, service, company, or organization.

Real estate brokerage recruiting, solicitation of licensees for affiliation, or other recruiting activities are prohibited at GLAR-sponsored events, programs, classes, and activities unless expressly authorized by GLAR.

7.1.c Reservation of Rights: GLAR reserves the right to reject, limit, suspend, terminate, or refuse to renew any sponsorship, advertising, exhibit, promotional activity, or sponsorship application that is inconsistent with GLAR's mission, policies, legal obligations, strategic objectives, or best interests.

GLAR further reserves the right to modify sponsorship opportunities, benefits, placement, recognition, or event logistics as necessary to accommodate operational, legal, contractual, or business requirements.

Sponsors participate at their own risk and shall be responsible for their own activities, materials, displays, personnel, products, services, and promotional efforts. Sponsorship participation shall not create any liability on the part of GLAR beyond the terms of the applicable sponsorship agreement.

7.2 Alcohol Service

Alcoholic beverages served at GLAR-sponsored events shall be provided in a manner that promotes responsible consumption, attendee safety, and minimizes risk to GLAR.

Attendees may be provided no more than one (1) complimentary alcoholic beverage or drink ticket per event. Any additional alcoholic beverages shall be purchased by attendees. Attendees and members who choose to consume additional alcoholic beverages do so voluntarily and assume full responsibility for their consumption, conduct, safety, and compliance with applicable laws.

Alcohol service shall be provided only by licensed, insured, or professionally retained servers, bartenders, caterers, venue personnel, or other authorized providers, as applicable.

Association members, volunteer leaders, volunteer members, Directors, Officers, and staff shall not serve, furnish, distribute, or sell alcoholic beverages to attendees unless acting in a professional capacity as an approved vendor, licensed server, bartender, caterer, venue representative, or authorized service provider.

Any individual who attempts to serve, furnish, distribute, or sell alcoholic beverages in violation of this policy may be denied alcohol service, removed from the event, and subject to additional disciplinary action as determined by the Association. The Board of Directors may impose further sanctions or take other action deemed appropriate under the Association's Bylaws, Policies and Procedures, and applicable law.

GLAR may establish additional event-specific guidelines regarding alcohol service, drink limits, age verification, ticketing procedures, beverage controls, designated drivers, transportation options, and other risk management measures.

All alcohol service shall comply with applicable laws, regulations, venue requirements, insurance requirements, and GLAR policies.

7.3 Registration, Cancellations, and No-Show Policy

7.3.a Registration: Registration may be required for GLAR events, courses, meetings, programs, and activities. Registration procedures, fees, attendance limits, and participation requirements shall be established by GLAR.

7.3.b Cancellations and Refunds: Cancellation deadlines, refund eligibility, processing procedures, and related requirements shall be established and communicated through event registration materials, course information, or other official GLAR communications. Unless otherwise specified for a particular event, cancellations must be received at least forty-eight (48) hours prior to the scheduled start time. Cancellations shall be submitted in the manner designated by GLAR.

7.3.c No-Show Fees and Paid Registrations: GLAR may assess a no-show fee for registrants who fail to attend a registered event, course, meeting, program, or activity and who do not cancel within the established cancellation period.

For paid events, classes, courses, programs, meetings, or activities, the registration fee is due and payable regardless of attendance unless the registrant cancels within the established cancellation period. Failure to attend does not relieve the registrant of the obligation to pay. No exceptions shall be made.

For complimentary or no-cost events, classes, programs, meetings, and activities, registrants who fail to attend and fail to cancel within the established cancellation period may be assessed a Fifty Dollar ($50) no-show fee to offset costs incurred by GLAR as a result of the confirmed registration, including venue, food and beverage, materials, staffing, speaker, technology, administrative expenses, or other event-related costs.

Certain programs, classes, meetings, or events may be exempt from the no-show fee provisions as determined by GLAR. The New Member Orientation online class option is exempt from the no-show fee provisions unless otherwise announced by the Association.

7.3.d Event Cancellations: GLAR reserves the right to cancel, postpone, reschedule, modify, or relocate any event, course, meeting, program, or activity. Refunds or credits, when applicable, shall be administered in accordance with the event's published registration terms.

SECTION 8: GENERAL POLICIES

8.1 Facilities and Association Property

8.1.a Association Assets: Payment of membership dues or fees does not create any ownership interest, equity interest, or vested right in Association assets or property.

8.1.b Official Address: The Board of Directors shall designate the official headquarters and principal office of the Association. The Association's principal office is currently located at **6017 Bristol Parkway, Culver City, California**, or at such other location as may be designated by the Board of Directors and reflected in the Association's official records.

8.1.c Smoke-Free Facility: GLAR facilities, offices, meeting spaces, and Association-controlled premises shall be maintained as smoke-free and vape-free environments.

Smoking, vaping, the use of electronic smoking devices, tobacco products, cannabis products, or similar substances is prohibited within Association facilities and in any area where prohibited by applicable federal, state, or local law.

Where permitted by applicable law, building rules, lease provisions, Commercial Owners Association (COA) requirements, or property management policies, smoking may be permitted only in designated outdoor areas established by the property owner or other governing authority.

All persons utilizing Association facilities shall comply with applicable smoking and vaping restrictions. Failure to comply may result in removal from the premises or other action deemed appropriate by the Association.

8.2 Meeting Room Rental and Facility Use

8.2.a Facility Availability: Association meeting rooms and training facilities may be made available for rental or use by members, affiliated organizations, community partners, governmental agencies, and other approved groups, subject to availability and Association needs. Association meetings, classes, and official functions shall receive scheduling priority.

8.2.b Fees and Charges: Rental fees, discounts, deposits, and other charges shall be established by the Association and may be modified from time to time. The CEO is authorized to administer facility rental rates and related procedures.

Institutes, Societies, and Councils affiliated with the National Association of REALTORS® (NAR), and representatives of the California Association of REALTORS® (C.A.R.), may use Association facilities without charge when no admission fee or registration fee is collected.

8.2.c Rental Agreement: All facility users shall comply with the Association's Facility Rental Agreement, including applicable requirements relating to reservations, deposits, insurance, indemnification, cancellation, conduct, food and beverage service, and use of Association property.

8.2.d Use Restrictions: Use of Association facilities does not constitute endorsement by the Association of any individual, organization, product, service, or viewpoint.

The Association reserves the right to refuse, condition, suspend, or terminate facility use that is inconsistent with the Association's mission, policies, legal obligations, safety requirements, or operational needs.

8.2.e Responsibility for Facilities: Facility users shall be responsible for complying with all applicable laws, regulations, and Association requirements and for returning Association facilities in substantially the same condition in which they were provided.

8.3 Communication Policies

8.3.a Use of Official Titles: Officers, Directors, committee chairs, workgroup leaders, and other Association representatives may accurately identify themselves by their official Association title when acting within the scope of their role. Use of an Association title shall not imply authorization to speak or act on behalf of the Association or the Board unless such authority has been granted by the Board of Directors, President, or Chief Executive Officer (CEO).

Individuals serving in elected, appointed, or volunteer leadership positions should recognize that their statements, communications, social media activity, and public comments may be perceived by members, the public, the media, governmental officials, or industry stakeholders as representing the position of the Association. When uncertainty exists regarding whether a communication, statement, or position may be attributed to GLAR, the individual should consult with the Chief Executive Officer (CEO) before speaking, posting, publishing, or otherwise communicating on behalf of the Association.

8.3.b Official Spokespersons: The President and Chief Executive Officer (CEO) are the primary official spokespersons of the Association. The President or CEO may designate additional spokespersons to represent the Association on specific matters, programs, initiatives, or issues.

8.3.c External Communications: Official communications issued on behalf of the Association regarding public policy positions, legal matters, advocacy issues, organizational positions, media

inquiries, or matters that may materially affect the Association's reputation, operations, or legal interests shall be authorized by the President, CEO, or their designee.

No officer, director, committee, workgroup, member, or staff person shall represent personal opinions as official positions of the Association.

Committees, workgroups, and Association representatives may communicate regarding matters within their assigned responsibilities, provided such communications are consistent with established Association policies and positions.

8.3.d Member Communications: Official communications to the Association's membership, including email distributions, newsletters, notices, surveys, and other mass communications, shall be distributed through Association staff or Association-authorized communication systems.

Volunteer leaders, including Officers, Directors, committee chairs, and workgroup leaders, may request that communications be distributed to members through Association staff but shall not independently distribute communications using Association membership records or represent such communications as official Association communications unless authorized by the CEO or President.

8.3.e Member Records and Privacy: Membership records, email addresses, telephone numbers, mailing addresses, and other personally identifiable member information are Association records and shall be maintained in accordance with applicable laws, NAR and C.A.R. requirements, and Association policies.

Member contact information shall not be distributed, sold, shared, or otherwise provided to Officers, Directors, committee members, workgroup participants, sponsors, vendors, or other members except as authorized by law, Association policy, or the CEO for legitimate Association business purposes.

Association membership rosters and contact lists shall not be provided to volunteer leaders for independent solicitation, campaigning, marketing, recruiting, or non-Association business purposes.

8.4 Photo, Video, and Recording Policy

8.4.a Use of Photographs and Recordings: GLAR may photograph, record, livestream, or otherwise capture images, audio, or video at Association meetings, classes, conferences, programs, events, and activities.

By attending or participating in a GLAR-sponsored event, program, meeting, class, or activity, participants grant GLAR permission to use, reproduce, publish, distribute, and display such photographs, audio recordings, video recordings, livestreams, or other media for Association purposes, including but not limited to publications, marketing materials, promotional materials, social media, websites, newsletters, educational content, and other Association communications.

8.4.b Opt-Out Requests: Individuals who do not wish to be photographed, recorded, or included in Association media should notify GLAR staff prior to the event or activity whenever practicable. GLAR will make reasonable efforts to honor such requests but cannot guarantee exclusion from photographs, recordings, livestreams, or other media captured in public or group settings.

8.4.c Ownership and Use: All photographs, recordings, livestreams, and other media created by or

on behalf of GLAR in connection with Association activities shall be the property of GLAR and may be used by the Association without compensation to participants.

8.4.d Member-Created Recordings: Unless otherwise permitted, announced, or authorized by GLAR, members, guests, and attendees may not record, livestream, broadcast, photograph, or distribute Association meetings, classes, programs, events, or official communications without the prior approval of the Chief Executive Officer (CEO) or designee.

8.5 Social Media and Electronic Communications Policy

8.5.a Purpose: Social media and electronic communication platforms are important tools for communication, engagement, education, and advocacy. GLAR encourages Directors, Officers, C.A.R. Directors, NAR Directors, MLS Representatives, committee chairs, workgroup leaders, volunteer leaders, volunteer members serving in an official Association capacity, and staff to use these platforms responsibly to promote GLAR's mission, Strategic Plan, advocacy efforts, programs, events, and member services.

8.5.b General Standards: Individuals serving in an elected, appointed, volunteer leadership, representative, or staff capacity for GLAR shall conduct themselves in a professional, respectful, ethical, and responsible manner when engaging in social media and electronic communications and shall avoid communications, comments, photographs, videos, or other content that could reasonably harm the reputation, relationships, operations, or interests of GLAR.

Individuals serving in leadership or representative roles on behalf of GLAR have ongoing fiduciary, leadership, and reputational responsibilities to the Association and shall act in good faith, exercise reasonable care, and conduct themselves in a manner reasonably believed to be in the best interests of GLAR. These responsibilities apply regardless of whether the individual is participating in Association business, using a personal account, attending an Association function, or communicating in a personal capacity. Individuals should recognize that members, industry stakeholders, elected officials, the media, and the public will often assume that Officers, Directors, C.A.R. Directors, NAR Directors, MLS Representatives, committee chairs, workgroup leaders, and other volunteer leaders are acting or speaking in their official GLAR capacity. Accordingly, such individuals should exercise sound judgment and understand that their statements, conduct, and online activity may reflect upon the Association, even when not intended as an official Association communication or position.

Unless specifically authorized, individuals shall not represent that they are speaking on behalf of GLAR or communicating an official Association position.

Social media communications may become public regardless of privacy settings. Individuals should assume that content posted online may be viewed, shared, reproduced, archived, or attributed to them indefinitely.

8.5.c Official Positions and Communications:

- The President serves as the chief elected spokesperson of GLAR. The Chief Executive Officer serves as the chief staff spokesperson of GLAR.
- Directors, volunteer leaders, volunteer members, and staff may share, repost, or reference official GLAR communications, policy positions, advocacy initiatives, programs, and announcements.
- Individuals serving in an official GLAR capacity shall not publicly represent personal opinions, political positions, endorsements, or advocacy positions as official positions of GLAR unless expressly authorized to do so.

- Directors and volunteer leaders may express differing viewpoints during deliberations; however, once the Board of Directors has established a policy or taken official action, individuals shall not represent personal positions as the official position of GLAR.
- When appropriate, individuals should include a disclaimer that opinions expressed are their own and do not represent the views of GLAR.
- Requests from members of the media regarding official GLAR positions, policies, or actions should be referred to the President, Chief Executive Officer, or their designee unless the individual has been authorized to speak on behalf of GLAR.

8.5.d Confidentiality: Individuals shall not disclose confidential, privileged, proprietary, personnel, legal, contractual, financial, disciplinary, executive session, or other non-public GLAR information through social media or any other electronic communication platform.

Individuals shall not disclose Board discussions, internal deliberations, pending matters, or information that has not been authorized for public release.

8.5.e Professional Conduct: Individuals shall:

- Demonstrate professionalism, courtesy, and respect when engaging with members, consumers, industry partners, elected officials, and the public.
- Posting content that is discriminatory, harassing, defamatory, threatening, misleading, or otherwise inconsistent with GLAR's values, governing documents, Code of Conduct, or the REALTOR® Code of Ethics, where applicable, is strictly prohibited.
- Shall not use their Association position, title, or affiliation to promote personal, professional, political, or commercial interests.
- Comply with all intellectual property rights, copyrights, trademarks, and licensing requirements, including the proper use of REALTOR® membership marks.
- Disparage, defame, or make false, misleading, or malicious statements about GLAR, its Board of Directors, Officers, staff, members, volunteers, or affiliated organizations, including C.A.R. and NAR.
- Publish, share, repeat, retransmit, or amplify misinformation, rumors, or unverified claims regarding GLAR.
- Exercise discretion when posting photographs or videos depicting members, volunteers, staff, elected officials, business partners, or other individuals and obtain permission when appropriate.
- Not publish, share, repeat, retransmit, or amplify false or misleading information regarding GLAR, its members, staff, leadership, programs, partners, or industry stakeholders.
- Comply with all applicable Fair Housing laws, antitrust laws, and other applicable laws and regulations.

8.5.f Questions Regarding Appropriateness: If an individual is uncertain whether a communication is appropriate, the individual should consult with the President, Chief Executive Officer, or appropriate Staff Liaison before publishing the communication.

8.5.g Records Retention: Individuals should be mindful that social media and electronic communications may constitute business records and may be retained, discoverable, or subject to legal, regulatory, or Association review.

8.5.h Violations: The Board of Directors, President, or Chief Executive Officer may request that an individual remove, retract, revise, clarify, or correct a communication that is inconsistent with this policy or the best interests of GLAR.

Violations of this policy may be addressed in accordance with the Bylaws, Policies and Procedures,

Code of Conduct, Agreement to Serve, personnel policies, or other applicable governing documents and may result in corrective action or disciplinary action including removal from a leadership position, or other action deemed appropriate by the Board of Directors.

8.6 Artificial Intelligence (AI) Policy

GLAR recognizes that Artificial Intelligence ("AI"), including Generative AI, Large Language Models (LLMs), Machine Learning, and other emerging technologies, may enhance productivity, communications, research, education, member services, and operational efficiency.

The purpose of this policy is to promote the responsible, ethical, secure, and lawful use of AI while protecting GLAR, its members, volunteers, staff, Multiple Listing Service relationships, confidential information, and reputation.

8.6.a Scope: This policy applies to Directors, Officers, volunteer leaders, volunteer members serving in an official Association capacity, staff, contractors, consultants, and any individual authorized to use AI tools in connection with GLAR business.

8.6.b Governance and Oversight: The Chief Executive Officer, in collaboration with designated staff, shall oversee the implementation, administration, and responsible use of AI technologies utilized by GLAR and may establish administrative procedures, technology standards, approved platforms, security requirements, and operational guidelines consistent with this policy.

The Chief Executive Officer may designate staff, advisors, legal counsel, technology consultants, or internal working groups to assist with AI governance, implementation, training, risk management, compliance, and ongoing evaluation of AI technologies.

The Board of Directors shall retain oversight of significant AI initiatives, policies, and risks that may materially impact GLAR's operations, member data, governance functions, financial management, legal compliance, public communications, strategic objectives, or reputation.

8.6.c Human Oversight: AI tools are intended to assist—not replace—human judgment. All official GLAR communications, publications, governance materials, legal documents, policy recommendations, educational content, financial analyses, public statements, and other significant work products generated or assisted by AI shall be reviewed and approved by an appropriate individual prior to publication, distribution, or implementation.

Individuals remain fully responsible for the accuracy, appropriateness, legality, and consequences of any AI-generated content or recommendations they use.

8.6.d Data Security and Confidentiality: Confidential, proprietary, privileged, legal, personnel, financial, governance, ethics, arbitration, disciplinary, or other non-public GLAR information shall not be entered into AI systems unless the platform has been approved by the CEO for such use and appropriate safeguards are in place.

Special care shall be taken to protect:

1. Member information and personally identifiable information (PII);
2. Financial records and banking information;
3. Human resources and personnel records;
4. Legal and privileged communications;
5. Governance documents and executive session materials;
6. Ethics, arbitration, and professional standards records;

7. Proprietary business information; and
8. Multiple Listing Service (MLS) information subject to licensing, contractual, governance, confidentiality, or shareholder restrictions.
9. AI-generated content must be reviewed for accuracy and appropriateness before being distributed, published, or used as official GLAR information.

8.6.e MLS and Shareholder Compliance: Any AI application involving MLS data, MLS operations, or shareholder-related information shall be reviewed for compliance with applicable MLS requirements before implementation.

8.6.f Acceptable Use: Approved AI applications may be used to support legitimate GLAR business activities, including communications, research, education, event planning, administrative functions, strategic planning, operational efficiency, and member services.

Use of AI shall be consistent with GLAR's mission, values, governing documents, professional standards, and legal obligations.

8.6.g Prohibited Uses: AI shall not be used to:

1. Generate discriminatory, misleading, fraudulent, defamatory, harassing, unlawful, or unethical content;
2. Violate Fair Housing laws, antitrust laws, privacy laws, intellectual property rights, the REALTOR® Code of Ethics, or other applicable laws and regulations;
3. Replace required human judgment in governance decisions, legal matters, personnel actions, ethics proceedings, arbitration matters, disciplinary actions, or financial oversight;
4. Create or distribute unauthorized synthetic media, deepfakes, fabricated endorsements, or misleading representations of GLAR, its members, volunteers, staff, leaders, partners, or affiliated organizations;
5. Disclose confidential or proprietary information through unauthorized AI platforms.
6. AI tools shall not be used in any manner that violates MLS Rules, licensing agreements, shareholder agreements, data-use restrictions, confidentiality requirements, or governance obligations associated with The MLS™ or any other MLS relationship.

8.6.h Fair Housing and Ethical Standards: AI shall be used in a manner consistent with Fair Housing laws, equal opportunity principles, the REALTOR® Code of Ethics, and GLAR's commitment to professionalism, inclusion, and ethical conduct.

Individuals using AI should remain aware that AI systems may contain inaccuracies, biases, or incomplete information and should exercise appropriate judgment and review.

8.6.i Vendor and Technology Compliance: The Chief Executive Officer may establish standards for the review, approval, procurement, implementation, monitoring, and discontinuation of AI platforms, integrations, plugins, vendors, and related technologies.

Where applicable, vendor agreements should address data ownership, confidentiality, security, retention, breach notification, and restrictions on the use of GLAR data for model training.

8.6.j Training and Awareness: GLAR may provide AI-related education, training, and guidance for Directors, volunteer leaders, volunteer members, and staff to support responsible and effective use of AI technologies.

8.6.k Violations: Violations of this policy may be addressed in accordance with the Bylaws, Policies and Procedures, Code of Conduct, Agreement to Serve, personnel policies, vendor

agreements, or other applicable governing documents.

GLAR reserves the right to restrict, suspend, or prohibit the use of any AI tool, platform, feature, integration, or service that presents legal, operational, security, governance, reputational, or compliance concerns.

8.7 Legal Policies

8.7.a Legal Counsel: GLAR may retain legal counsel as authorized by the Board of Directors to provide legal advice, representation, risk management guidance, and other legal services necessary to protect the interests of the Association.

Legal counsel may be retained in specialized practice areas, including but not limited to:

1. Association Counsel, providing legal advice and representation regarding governance, corporate matters, contracts, risk management, compliance, advocacy, and other matters affecting GLAR.
2. Employment and Human Resources Counsel, providing legal advice regarding employment practices, personnel matters, workplace policies, employee relations, labor and employment law compliance, and related matters.
3. Multiple Listing Service (MLS) Counsel, providing legal advice regarding MLS operations, rules and regulations, antitrust compliance, intellectual property matters, data licensing, and matters related to GLAR's ownership interest and shareholder obligations associated with The MLS™/Combined L.A./Westside MLS (CLAW).

The Chief Executive Officer shall coordinate the engagement and administration of legal counsel on behalf of GLAR, subject to Board oversight and these policies.

8.7.b Access to Legal Counsel: To preserve attorney-client privilege, ensure consistency of legal guidance, and manage legal expenses, official communications with GLAR's legal counsel regarding Association business shall be coordinated through the Chief Executive Officer, or their designee, unless otherwise authorized by the Board of Directors.

No Director, volunteer leader, volunteer member, staff member, committee, workgroup, task force, forum, advisory group, or other individual may engage legal counsel on behalf of GLAR or obligate GLAR for legal fees, expenses, or commitments without proper authorization.

8.7.c Legal Advice and Representation: GLAR's legal counsel represents the interests of the Association and does not provide legal advice, representation, or services to individual members, Directors, volunteer leaders, volunteer members, or staff in their personal or business capacities. Neither GLAR, its Directors, officers, volunteer leaders, volunteer members, nor staff shall provide legal advice to members or third parties. Individuals seeking legal advice should consult their own legal counsel.

8.7.d Litigation and Legal Matters: Only the Board of Directors, or individuals specifically authorized by the Board, may approve litigation, legal settlements, legal claims, or other legal actions on behalf of GLAR.

No individual member, group of members, committee, workgroup, task force, forum, advisory group, or other volunteer body may initiate, direct, or obligate GLAR to participate in litigation, arbitration, mediation, or other legal proceedings without authorization from the Board of Directors.

8.7.e Confidentiality and Privileged Communications: Legal opinions, attorney-client communications, litigation strategy, settlement discussions, and other privileged or confidential legal matters shall be treated as confidential and shall not be disclosed except as authorized by legal counsel, the President, the Chief Executive Officer, or the Board of Directors.

8.7.f Whistleblower and Reporting of Concerns: GLAR is committed to lawful, ethical, and transparent operations. Directors, volunteer leaders, volunteer members, staff, contractors, vendors, and members are encouraged to report concerns regarding suspected violations of law, unethical conduct, fraud, misuse of Association assets, conflicts of interest, financial improprieties, policy violations, or other activities that may adversely affect GLAR.

Concerns may be reported to the Chief Executive Officer, President, or another appropriate Association leader. Individuals making good-faith reports shall not be subject to retaliation, harassment, discrimination, adverse treatment, or reprisal for reporting a concern or participating in an investigation.

Reports shall be reviewed and addressed in a manner deemed appropriate by GLAR, consistent with applicable laws, policies, and confidentiality requirements.

8.8 Intellectual Property, Trademarks, and Association Branding

8.8.a Ownership: The name "Greater Los Angeles REALTORS®" ("GLAR"), the GLAR logo, and any other Association trademarks, service marks, logos, branding elements, publications, digital assets, and intellectual property are the exclusive property of GLAR unless otherwise specified.

8.8.b Authorized Use: No individual, member, volunteer, Director, Officer, committee, workgroup, task force, affiliate, vendor, sponsor, or third party may use the GLAR name, logo, trademarks, branding, or other intellectual property without prior written authorization from GLAR (email is acceptable).

Authorized use shall be limited to the specific purpose approved by GLAR and shall not imply endorsement, sponsorship, partnership, or official representation unless expressly authorized.

8.8.c Branding Standards: Any approved use of GLAR trademarks, logos, or branding materials shall comply with applicable branding, trademark, and usage standards established by GLAR. Users shall not alter, distort, modify, recreate, or otherwise misuse GLAR trademarks or branding elements without authorization.

8.8.d REALTOR® Marks: The use of REALTOR®, REALTORS®, REALTOR-ASSOCIATE®, and other membership marks owned by the National Association of REALTORS® shall comply with all applicable NAR trademark policies and membership mark requirements.

8.8.e Reservation of Rights: GLAR reserves all rights relating to its trademarks, logos, branding, publications, and intellectual property and may deny, restrict, revoke, or terminate permission for use at any time.

Unauthorized use may result in corrective action, removal of materials, legal action, or other remedies available under applicable law.

8.9 NAR Core Standards Compliance

8.9.a Requirement: As a condition of membership and chartering with the National Association of

REALTORS® (NAR), GLAR shall maintain compliance with all applicable NAR Core Standards and any successor organizational performance requirements adopted by NAR.

8.9.b Areas of Compliance: GLAR shall maintain compliance with all Core Standards categories and reporting requirements established by NAR, including but not limited to:

1. Code of Ethics;
2. Advocacy;
3. Consumer Outreach;
4. Support of the REALTOR® Organization;
5. Technology; and
6. Financial Solvency.

8.9.c Administration: The Chief Executive Officer shall oversee the Association's annual certification, reporting, and documentation processes and shall keep the Board of Directors informed regarding the Association's compliance status and any material issues affecting compliance.

8.9.d Organizational Responsibility: Maintaining compliance with NAR Core Standards is a responsibility of GLAR as an organization and shall be supported through the actions of the Board of Directors, volunteer leaders, committees, workgroups, and staff, as applicable.

8.9.e Successor Requirements: If NAR modifies, replaces, renames, or supersedes the Core Standards program, GLAR shall comply with the successor requirements without the necessity of amending these Policies and Procedures.

8.10 Anti-Harassment, Anti-Discrimination, and Respectful Conduct Policy

8.10.a Commitment: GLAR is committed to providing a professional, respectful, inclusive, and welcoming environment for all members, volunteers, Directors, Officers, employees, contractors, vendors, sponsors, speakers, guests, and event participants.

Harassment, discrimination, bullying, retaliation, intimidation, or other inappropriate conduct is inconsistent with the values of the REALTOR® organization and will not be tolerated.

8.10.b Scope: This policy applies to all Association-related activities, including but not limited to:

- Board of Directors meetings;
- Committee, workgroup, task force, and forum meetings;
- Educational programs and classes;
- Conferences, conventions, and networking events;
- Association-sponsored travel;
- Electronic communications;
- Social media interactions;
- Virtual meetings and online platforms;
- Communications between members, volunteers, leaders, and staff relating to Association business; and
- Any other activity conducted under the authority or sponsorship of GLAR.
- The MLS®

8.10.c Prohibited Conduct: Harassment, discrimination, bullying, retaliation, intimidation, or other inappropriate conduct based upon any characteristic protected by applicable federal, state, or local law is prohibited.

Prohibited conduct may include, but is not limited to:

- Verbal abuse, insults, slurs, epithets, or derogatory comments;
- Offensive jokes, stereotypes, or ridicule;
- Threatening, intimidating, hostile, or disruptive behavior;
- Unwelcome comments regarding a person's appearance, identity, beliefs, or personal characteristics;
- Displaying, transmitting, or distributing offensive, discriminatory, or harassing materials;
- Cyberbullying, online harassment, or inappropriate electronic communications;
- Retaliation against any individual who reports a concern or participates in an investigation; and
- Any conduct that creates an intimidating, hostile, offensive, or disruptive environment.

8.10.d Sexual Harassment: Sexual harassment is a form of prohibited conduct and will not be tolerated. Sexual harassment may include unwelcome sexual advances, requests for sexual favors, sexually suggestive comments, inappropriate jokes, gestures, images, messages, physical contact, or other verbal, visual, electronic, or physical conduct of a sexual nature.

8.10.e Duty to Report: Any individual who experiences, witnesses, or becomes aware of conduct that may violate this policy is encouraged to promptly report the matter.
Reports may be made to:

- The Chief Executive Officer;
- The President;
- The President-Elect; or
- Another individual designated by the Association when circumstances warrant.

Reports may be made verbally or in writing.

8.10.f Non-Retaliation: Retaliation against any person who, in good faith, reports a concern, participates in an investigation, provides information, or assists in resolving a complaint is strictly prohibited. Any act of retaliation shall constitute an independent violation of this policy.

8.10.g Investigation and Resolution: GLAR shall promptly review reports received under this policy and may consult with legal counsel, human resources professionals, investigators, or other advisors as appropriate.

The Association may conduct such investigation as it deems necessary to determine the facts and circumstances surrounding a complaint.

The Association shall make reasonable efforts to maintain confidentiality to the extent practical, consistent with conducting a thorough investigation and complying with legal obligations.

8.10.h Interim Protective Measures: Pending review or investigation, GLAR may take temporary actions deemed necessary to protect participants, preserve meeting integrity, maintain a safe environment, or reduce disruption. Such actions may include removal from meetings or events, suspension of volunteer duties, limitations on participation, or other appropriate measures.

8.10.i. Investigation Structure and Review Process: Upon receipt of a report alleging a violation of this policy, the Association shall conduct such review or investigation as it deems appropriate under the circumstances.

The Chief Executive Officer, or designated Staff, President, or President-Elect may conduct an initial review to determine whether the matter may be resolved informally, referred for further

investigation, or requires immediate interim protective measures.

If a formal investigation is deemed appropriate, the CEO may appoint an investigatory panel, retain an independent investigator, utilize legal counsel, human resources professionals, or engage another qualified individual or organization to conduct or assist with the investigation.

Any person participating in the review, investigation, recommendation, or determination of a complaint shall be free from actual or apparent conflicts of interest. A conflict of interest shall exist whenever a reasonable person would conclude that an individual's ability to act impartially may be impaired by a personal, family, financial, business, professional, or other significant relationship with any party involved. Any individual with a conflict of interest shall recuse themselves and may be replaced by another individual designated by the CEO or President or, if the CEO or President is involved in the matter, by the next highest-ranking Officer not involved in the matter.

The Association shall provide the individual against whom a complaint has been made a reasonable opportunity to respond to the allegations before any final disciplinary action is imposed, except where interim protective measures are deemed necessary under Section 8.10.h. Following completion of the investigation, the Board of Directors, or such individual, panel, committee, investigator, legal counsel, or hearing body authorized by the Board, shall determine whether a violation of this policy has occurred and shall recommend or impose corrective action as authorized by these Policies and Procedures, the Bylaws, and applicable law.

The Association shall maintain records of complaints, investigations, findings, and actions taken under this policy in accordance with applicable record retention requirements and confidentiality considerations.

8.10.j Corrective Action: Violations of this policy may result in corrective or disciplinary action, including but not limited to:

- Verbal or written warning;
- Removal from a meeting, event, or activity;
- Removal from a committee, workgroup, task force, forum, or leadership position;
- Ineligibility for future volunteer appointments;
- Suspension of Association privileges where authorized;
- Referral to Professional Standards when applicable; and
- Any other action deemed appropriate by the Board of Directors and permitted by the Bylaws, Association policies, or applicable law.

8.10.k Mandatory Training: In accordance with applicable California law, including the California Fair Employment and Housing Act (FEHA) and related harassment prevention training requirements, all GLAR employees shall complete harassment prevention training as required by law.

In addition, all Directors and Officers shall complete harassment prevention training at least once every two (2) years, regardless of whether such training is otherwise required by law.

The Association may require additional harassment prevention, discrimination prevention, diversity, equity, inclusion, civility, professionalism, or respectful workplace training for volunteer leaders, committee chairs, workgroup leads, committee members, MLS representatives, staff, or other individuals serving on behalf of GLAR.

Failure to complete required training may result in ineligibility for service, suspension of leadership privileges, removal from a leadership position, or other action deemed appropriate by the

Association.

8.10.l Relationship to Other Policies: This policy shall be interpreted in conjunction with the Association's Code of Conduct, Agreement to Serve, Conflict of Interest Policy, Confidentiality Requirements, Antitrust Policy, Social Media Policy, and all applicable federal, state, and local laws.

SECTION 9: MULTIPLE LISTING SERVICE REPRESENTATION AND SHAREHOLDER GOVERNANCE

9.1 Purpose and Relationship with The MLS™

GLAR maintains an ownership interest and shareholder relationship in The MLS™/Combined L.A./Westside MLS (CLAW). As a shareholder, GLAR is entitled to representation and participation in the governance of The MLS™ in accordance with applicable shareholder agreements, governing documents, and applicable law.

The purpose of this Section is to establish policies governing GLAR's shareholder representation, appointment process, service expectations, and compliance obligations related to The MLS™.

9.2 Shareholder Governance and Representation

GLAR shall appoint qualified representatives to serve on the Board of Directors and other governing bodies of The MLS™ as permitted by applicable shareholder agreements, governing documents, and organizational requirements.

MLS Board Representatives serve to protect and advance the interests of GLAR while fulfilling their fiduciary duties to The MLS™ and complying with all applicable laws, regulations, governing documents, confidentiality obligations, and antitrust requirements.

GLAR shall maintain compliance with all shareholder obligations, contractual commitments, governing documents, and participation requirements associated with its ownership interest in The MLS™.

The Chief Executive Officer shall monitor compliance with shareholder obligations and report significant shareholder matters to the Board of Directors.

9.3 MLS Board Representative Qualifications

MLS Board Representatives shall:

- Be active REALTOR® Members in good standing of GLAR.
- Be MLS Participants or Subscribers in good standing, if required by The MLS™.
- Maintain all applicable licensing, membership, and eligibility requirements throughout their term of service.
- Demonstrate leadership experience, governance competency, and the ability to represent GLAR's interests effectively.
- Complete all required onboarding, orientation, and training programs.
- Be willing and able to attend meetings, training sessions, and other activities required by The MLS™ and GLAR.

9.4 MLS Board Representative Appointment Process

MLS Board Representatives shall be appointed by the Executive Committee and ratified by the Board of Directors.

Candidates shall submit an application and any supporting materials required by GLAR.
The Board of Directors may establish additional qualifications, application procedures, interview processes, evaluation criteria, and selection procedures.

Appointments shall be based upon qualifications, leadership experience, governance competency, commitment to service, and the needs of GLAR and The MLS™.

9.5 Appointment Timeline

To support orderly succession planning and compliance with shareholder governance requirements, the selection process for MLS Board Representatives shall be conducted annually. Applications for anticipated vacancies shall be solicited and reviewed in accordance with procedures established by GLAR.

Appointments and confirmations for positions becoming available in the following calendar year should be completed no later than October 15 of each year unless a different timeline is required by The MLS™, applicable shareholder agreements, or governing documents.

The President, Chief Executive Officer, and Board of Directors may establish application deadlines, interview schedules, and appointment procedures necessary to facilitate timely selection of qualified candidates.

9.6 Service Expectations and Accountability

MLS Board Representatives shall:

- Act in a manner consistent with GLAR's mission, strategic objectives, and shareholder interests.
- Comply with all fiduciary, confidentiality, conflict-of-interest, and antitrust obligations applicable to their service.
- Maintain effective communication with GLAR leadership and staff regarding matters affecting GLAR's ownership interest in The MLS™, while preserving the confidentiality of non-public information and fulfilling all fiduciary, legal, and governance obligations owed to The MLS™.
- Provide periodic reports to the GLAR Board of Directors regarding MLS matters to the extent permitted by applicable confidentiality obligations, shareholder agreements, and MLS governing documents.
- Attend meetings, training sessions, and governance activities required by The MLS™.
- Attend the annual GLAR Leadership Training program and any onboarding, orientation, or governance training required by GLAR.
- Conduct themselves in a manner that reflects positively on GLAR and the REALTOR® organization.

9.7 Board Service Restrictions and Antitrust Compliance

To avoid potential conflicts of interest, preserve appropriate governance separation, and address antitrust considerations, individuals serving as voting members of the Board of Directors of The MLS™ shall not simultaneously serve as members of the GLAR Board of Directors during their term

as an MLS Board Representative..

An individual appointed to the Board of Directors of The MLS™ who is serving on the GLAR Board of Directors shall resign from one of the positions before assuming said position.

MLS Board Representatives shall comply with all applicable antitrust laws, MLS governance requirements, and conflict-of-interest obligations.

MLS Board Representatives shall exercise independent judgment in carrying out their fiduciary responsibilities to The MLS™ while representing GLAR's shareholder interests as permitted by law and the governing documents of The MLS™.

9.8 Confidentiality

MLS Board Representatives shall maintain the confidentiality of all non-public information obtained through service with The MLS™ and shall comply with all confidentiality obligations imposed by The MLS™, applicable shareholder agreements, and GLAR policies.

Confidential information shall not be disclosed to members, Directors, committees, workgroups, task forces, forums, advisory groups, staff, or third parties except as authorized by The MLS™ or required by law.

Nothing in this policy shall prevent MLS Board Representatives from providing reports or information authorized for disclosure under applicable MLS governing documents or shareholder agreements.

9.9 Term, Removal, and Vacancies

Terms of service for MLS Board Representatives shall be governed by the applicable governing documents of The MLS™, any applicable shareholder agreements, and the appointment or designation rights available to GLAR thereunder.

MLS Board Representatives are appointed or designated pursuant to GLAR's rights under applicable shareholder agreements and MLS governing documents. Once seated, MLS Board Representatives owe their fiduciary duties to The MLS™ in their capacity as directors of The MLS™ and shall comply with all applicable MLS governing documents, confidentiality obligations, conflict of interest requirements, and legal duties.

GLAR may recommend, replace, recall, or designate successor MLS Board Representatives only to the extent permitted by applicable shareholder agreements, MLS governing documents, and law. Vacancies shall be filled in the manner prescribed for the original appointment or designation and in accordance with applicable shareholder agreements and MLS governing documents.

9.10 Compliance with Shareholder Agreements and MLS Governing Documents

All appointments, qualifications, service requirements, reporting obligations, removals, and governance practices relating to MLS Board Representatives shall be subject to the governing documents, shareholder agreements, and operating requirements of The MLS™.

In the event of a conflict between these Policies and Procedures and the governing documents or shareholder agreements of The MLS™, the governing documents and shareholder agreements of The MLS™ shall control.