

# 2024 VOLUNTEER HANDBOOK







# A MESSAGE FROM THE CEO

Volunteers make it possible for Oregon REALTORS® to fulfill our mission and achieve our strategic priorities. Volunteering is also an opportunity for our members to learn more about the Association, expand their networks, and develop new skills to serve their businesses.

We are grateful that our dedicated members are willing to share their time, energy, and talents. Our volunteers make a lasting impact on the real estate industry through involvement in Oregon REALTORS®.

The strategic work of the Association is done by volunteer members with assistance and implementation by our staff. In partnership with staff, more than a dozen committees assist in identifying industry issues and working collaboratively to find solutions that work for REALTORS®.

Committees range from:

## **Government and Politics**

From current events to emerging issues, the advocacy committees include Government Affairs Key Committee, Political Affairs Key Committee, Issues Mobilization, and ORPAC Trustees. These volunteers are engaged with legislative and regulatory agency decision-makers at all levels of government in Oregon.

## **Risk Management**

The Business Issues Key Committee, Legal Action, and Professional Standards committees are committed to risk reduction, working to ensure that Oregon REALTORS® members can successfully conduct business in an increasingly complex and changing marketplace and are aligned with the National Association of REALTORS® Code of Ethics. In 2023, we saw the launch of a full suite of forms created by Oregon REALTORS®.

# A MESSAGE FROM THE CEO

## **Fair Housing and Diversity, Equity, and Inclusion**

If you're interested in helping to ensure equity in the industry, the Diversity Key Committee might be a great fit. The committee purpose is to enhance the sense of belonging for members from underserved identities through leadership opportunities, mentorship, intentional programming, and partnership with local groups.

## **Professional Development**

If education is your passion, consider the Professional Development Key Committee and help ensure members receive top-quality continuing education that increases the level of professionalism within the industry and serves their business needs.

## **Elected Positions**

If ascending through leadership roles is on your radar, Oregon REALTORS® has elected positions, including President, President-Elect, District Vice Presidents, and National Association of REALTORS® Directors. This is an opportunity to be involved at a higher level, making decisions that impact the Association for years to come.

If you have any questions about volunteering for Oregon REALTORS®, please reach out to staff who can assist with any questions.

Thank you for your time and commitment to the industry.



# ABOUT THE OREGON REALTORS® HANDBOOK

This handbook is designed to introduce you to Oregon REALTORS® and to provide a basic overview of the volunteer opportunities, policies, and procedures that provide guidance and direction for volunteers and staff. As a member volunteer, you will receive guidance, opportunities, and recognition for your efforts.

In return we expect you to honor your commitment as a volunteer, respect other members and Oregon REALTORS® staff, and perform your duties to the best of your abilities.

As our organization grows and changes, there will be a need to modify policies, practices, and other information in this handbook. When such changes occur, you will be notified by an announcement or update. It is your responsibility to keep your handbook current and to be informed about policies and changes that affect you.

If you have any questions regarding the information contained in this handbook, please contact Oregon REALTORS®.





## HISTORY

In 1932, Oregon REALTORS® was established to organize the real estate profession in Oregon. Today, Oregon REALTORS® is your business advocate, a force for education, and a legislative champion for free enterprise and private property rights in Oregon. Oregon REALTORS® core purpose is to advance the ability of Oregon REALTORS® to practice the real estate profession in an ethical, profitable, and successful manner.

## GOVERNANCE

The work of Oregon REALTORS® is overseen by a 14-member Executive Committee, led by the President of the Association, and a 100+ member Board of Directors, representative of 23 local associations from across the state. The state is divided into six districts, each represented on the Executive Committee by a District Vice President.

## OUR MISSION

We unify and serve our members and local associations, providing the resources and tools for their success.

## OUR VISION

Oregon REALTORS® is the trusted source for all things real estate.

# 2023-2025 STRATEGIC PLAN



## MISSION

We unify and serve our members and local associations by providing the resources and tools for their success.

## VISION

Oregon REALTORS® is the trusted source for all things real estate.

### ADVOCATE

Expand our political strength and influence throughout Oregon to protect private property rights, fair housing, and to promote real estate ownership.

- Protect each member's right to do business.
- Support legislative policy and candidates for public office.
- Encourage grassroots efforts through key constituent program and candidate training.
- Affect license law to balance the needs of the industry, business practices and consumer protection.
- Expand investment in the REALTORS® Political Action Committee.
- Promote REALTOR® Party benefits to expand the use of programs at the local, state, and national levels.

### EDUCATE

Empower members and local associations to increase involvement, inclusivity, and professionalism.

- Analyze member needs and emerging industry trends through research and feedback to effectively allocate resources.
- Provide high quality and timely educational opportunities and risk management tools that support member professional development.
- Equip local associations and principal brokers with tools and knowledge to support their diverse members.

### COLLABORATE

Foster strong relationships between our diverse members and communities.

- Provide regular opportunities for member engagement and interaction.
- Seek new partners to promote strong communities.
- Promote job growth and economic development.

### LEAD

Advance a culture of leadership development to expand REALTOR® Influence.

- Be the "Voice for Real Estate" by delivering information to enhance the value of the REALTOR® brand.
- Elevate our image through involvement in other organizations and the community.
- Cultivate leaders who represent the diversity of our state and membership.
- Leverage the value and experience of our legacy leaders.
- Ensure the Association's structure is strategically focused and encourages participation from our diverse membership.



# ELECTED VOLUNTEER POSITIONS

The strategic work of Oregon REALTORS® is done by volunteer member leaders, assisted and implemented by staff. The following are the elected positions within the organization.

The term for elective offices of the Association is from the first day after the end of the annual NAR Convention (usually around Veteran's Day in November) to the last day of the NAR Convention the following year. For more information on the following positions, see Section 1 of the [Oregon REALTORS® Policy Governance Guide](#).

## **PRESIDENT**

The President serves as chief elected officer of the Association. The President position is not normally elected as it is an ascension from the previous year's elected President-Elect. The President serves as a state Board Director and as chair of the Executive Committee during their term. Additionally, the President serves as an NAR Director during their term. Past Presidents serve as state Board Directors for the remainder of their service as a licensed REALTOR®.

## **PRESIDENT-ELECT**

The President-Elect serves one year as President-Elect and the consecutive year as President. Elections are held at Spring Governance meetings (typically in April) the year before the President-Elect's term begins. The President-Elect also serves as a state Board Director and as a voting member of the Executive Committee.

## **NAR DIRECTOR**

The governance of the National Association of REALTORS® (NAR) is vested in the NAR Board of Directors. Oregon is represented by members on the NAR Board of Directors. The role of an NAR Director mirrors that of a State Director but on a national level. NAR Directors are required to attend the NAR Board of Directors meetings held during two national meetings (Mid-Year Legislative Meeting and Annual Conference). Attendance at the Region 12 annual conference is also recommended. Their responsibilities include reporting back to the State Directors on the activities and actions occurring at the national meetings.

Oregon's NAR Directors include:

- Current Oregon REALTORS® President (Appointment) (One-year term)
- At- Large Directors - Elected by Oregon REALTORS® Board of Directors. The number of state allocated directors is determined by annual membership count by NAR in July. (Three-year term)

# ELECTED VOLUNTEER POSITIONS

- Small Board members--defined as a local board with a membership of 0-499 -- based on membership count assessed annually, in July, by NAR, Small Board Directors are elected by the Oregon REALTORS® Board of Directors. (Three-year term)
- Medium Board members--defined as a local board with a membership of 500-1,999--based on membership count assessed annually, in July, by NAR, Medium Board Directors are elected by the Oregon REALTORS® Board of Directors. (Three-year term)
- Large Board members--defined as a local board with a membership of 2,000 or more--based on membership count assessed annually, in July, by NAR, Large Board Directors are elected by the qualifying large board.
- Oregon REALTORS® who have served as an NAR officer, including former NAR Presidents and former NAR Treasurers who continue to be affiliated with their respective local boards and active in the National Association.

## STATE DIRECTOR

The following persons shall be directors of the Association:

- Directors at large elected or appointed by each Member/Association on a quota basis of one director for the first 200 Association Members or fraction thereof, plus an additional director for each 200 additional Association Members or major fraction thereof
- The President and President-Elect of the Association
- National Association of REALTORS® Directors
- Past Presidents of the Association who hold active membership in the Association
- District Vice Presidents
- Chairs of Key Committees
- Members of the Finance Review Committee
- Affiliate member director

## DISTRICT VICE PRESIDENT (DVP)

Local association Presidents elect the District Vice President (DVP) for their respective districts. The DVP assists the President and represents the Association in the District they were elected. The DVPs serve as a conduit of information between the Executive Committee and their District, assist with RPAC fundraising and troubleshoot for the local boards if the need arises. Local Association Presidents in the specified districts elect the DVPs by March 1st, as follows:

- District 1 (Odd years) Clatsop County, Columbia County, East Metro, Portland Metro
- District 2 (Odd years) Lincoln County, Polk County, Mid Valley, Tillamook County, Willamette, Yamhill County
- District 3 (Even years) Central Oregon Coast, Eugene, Springfield
- District 4 (Even years) Coos County, Curry County, Douglas County, Rogue Valley
- District 5 (Odd years) Central Oregon, Klamath County, Statewide (non-affiliated)
- District 6 (Even years) Columbia Basin, Mid-Columbia, Four Rivers, Umatilla County



# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **BUSINESS ISSUES KEY COMMITTEE (BIKC)**

The role of the BIKC is to assist members to successfully conduct their business in an increasingly complex and changing marketplace, specifically dealing with issues involving the Real Estate Agency, Multiple Listing Service, brokerage management, and general risk management practices. Work directly with leaders from other industry related business partners by participating in forums and collaboration on development of business tools to assist members with their real estate practice.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), up to 18 members (2 yrs.) (Chair serves on the Executive Committee and the Board of Directors during their term.)

Oregon REALTORS® will strive to identify representatives from allied industries, including but not limited to appraisers, title and escrow companies, mortgage companies, property management, and home builders to serve on the Committee.

Subcommittees: Appraiser Issues, Commercial Issues

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Legal Affairs Director



# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **DIVERSITY KEY COMMITTEE**

The role of the Diversity Committee is to focus on meeting the needs of the members by providing education, information, and advocacy while seeking to increase fair treatment, equitable opportunities to information and resources, and by helping to build an industry culture of belonging, contribution, and participation.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), 18 members (2 yrs.)  
(Chair serves on the Executive Committee and the Board of Directors during their term.)

Oregon REALTORS® will strive to identify representatives from Multicultural and/or Minority Real Estate Organizations (AAREA, NAREB, NAGLREP, NAHREP, WCR, etc.) to serve on the committee.

Subcommittees: Mentorship and Belonging; Training and Education; Outreach and Comms; Grants and Funding

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms.

Staff Liaison: Diversity Director





# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **GOVERNMENT AFFAIRS KEY COMMITTEE (GAKC)**

The role of the GAKC is to help form and recommend policies concerning legislative issues affecting the industry and private property rights. Review and analyze legislative proposals for their effect on the real estate industry. Communicate with Association leadership and members concerning legislative and regulatory issues. Develop new, and refine existing, programs and activities that bring members into direct contact with the legislative/regulatory process.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), up to 18 members (2 yrs.) (Chair serves on the Executive Committee and the Board of Directors during their term.)

Subcommittee: Land Use and Water Policy

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms.

Staff Liaison: Government Affairs Director

## **POLITICAL AFFAIRS KEY COMMITTEE (PAKC)**

The role of the PAKC is to manage existing programs and identify new opportunities to assist members to become involved in the political process at the local, state, and federal level. Encourage and assist local association in the development of comprehensive political affairs programs at the local level. Mobilize and bring members into direct contact with elected officials and the legislative/regulatory process.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), up to 18 members (2 yrs.) (Chair serves on the Executive Committee and the Board of Directors during their term.)

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms.

Staff Liaison: Government Affairs Director



# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **PROFESSIONAL DEVELOPMENT KEY COMMITTEE (PDKC)**

The role of the PDKC is to provide opportunities to members to increase their knowledge, skills, and professionalism in order to better serve their clients and customers. The committee also recommends and review education topics, courses, and instructors for live instruction, online education, webinars, and designations.

Membership: Chair (1 yr), Vice-chair (1 yr), Immediate Past Chair (1 yr), up to 18 members (2 yrs.)  
*(Chair serves on the Executive Committee and the Board of Directors during their term.)*

Oregon REALTORS® will also strive to identify representatives from Institute Affiliates, WCR, CRS, CRB, YPN, and other diverse allied groups to serve on the committee.

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Education Director

## **FINANCE REVIEW-SPECIAL COMMITTEE (FRC)**

The role of the FRC is to work for the protection and investment of the Association's assets by ensuring that accurate financial records are maintained, and appropriate financial reports are developed (including the annual budget presentation to the Board of Directors). The committee also reviews quarterly financials to ensure the Association is operating within the parameters of the approved budget, maintaining a financially sound organization. Another responsibility of the committee is to review annual independent audit and make recommendations for any appropriate controls as needed.

Membership: Chair, 3 members  
*(Chair and Members serve on the Board of Directors during their term)*

Term: 2 years *(staggered)*

Staff Liaison: Chief Executive Officer and Controller

# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **LEGAL ACTION-SPECIAL COMMITTEE**

The role of the Legal Action Committee is to receive and evaluate requests for financial assistance for Amicus participation regarding litigation representing issues of substantial importance to the real estate profession. Another responsibility of the committee is to monitor present and future legal liabilities and issues affecting real estate and licensees.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), 6 members (2 yrs.)

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Legal Affairs Director

## **ISSUES MOBILIZATION-SPECIAL COMMITTEE**

The role of the Issues Mobilization Committee is to promote and strive for the improvement of government by encouraging and stimulating REALTORS® and the general public to take a more active and effective part in issues campaigns promoting REALTOR® public policy. Another responsibility of the committee is to provide resources for independent and in-kind expenditures in support of REALTOR® Party candidates for elected office at the local level.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), 5 members (2 yrs.)

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Government Affairs Director





# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **REALTORS® POLITICAL ACTION BOARD OF TRUSTEES-SPECIAL COMMITTEE (ORPAC)**

The role of ORPAC is to raise funds for use at both state and federal political levels. ORPAC also considers campaign endorsements and contributions to candidates and parties at the state government level, and coordinates member/local association political activity at the local government level.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1yr.), up to 18 members (2yrs.), including Chair of the Political Affairs Committee (ex-officio)(2 yrs.), and Chair of Government Affairs Key Committee (ex-officio)(2 yrs.)

(Chair serves on the Board of Directors during their term)

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Government Affairs Director

## **ELECTIONS-SPECIAL COMMITTEE**

The role of the Elections Committee is to certify candidates and supervise elections of all elected positions within the Association.

Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), 6 members from different local associations (2 yrs.)

Term: 2 years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Executive Assistant

# OREGON REALTORS® COMMITTEE OPPORTUNITIES

## **REALTOR® OF THE YEAR (ROTY)/DISTINGUISHED SERVICE AWARD (DSA)-SPECIAL COMMITTEE**

The role of the ROTY Committee is to develop and recommend selection criteria for and select REALTOR® of the Year candidate (Spring) and nominee for Distinguished Service Award (Fall).

Membership: Chair (1 yr.), Past REALTOR® of the Year, once removed; Vice-chair (1 yr.), Immediate past REALTOR® of the Year; Immediate Past Chair (1 yr.), Past REALTOR® of the Year, twice removed; 5 members (2yrs.) including: Other past REALTORS® of the Year (2), Non-REALTORS® of the YEAR (3)

Term: 2 Years

All committee members, excluding the Vice-chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Executive Assistant

## **PROFESSIONAL STANDARDS-SPECIAL COMMITTEE**

The role of the Professional Standards Committee is to assure that Oregon REALTORS® meets its obligation as a State Association concerning the Code of Ethics of the National Association of REALTORS®, including arranging for such hearings as fall within its jurisdiction, assisting local associations with their professional standards enforcement, and providing training and education programs, products, and services to support these efforts.

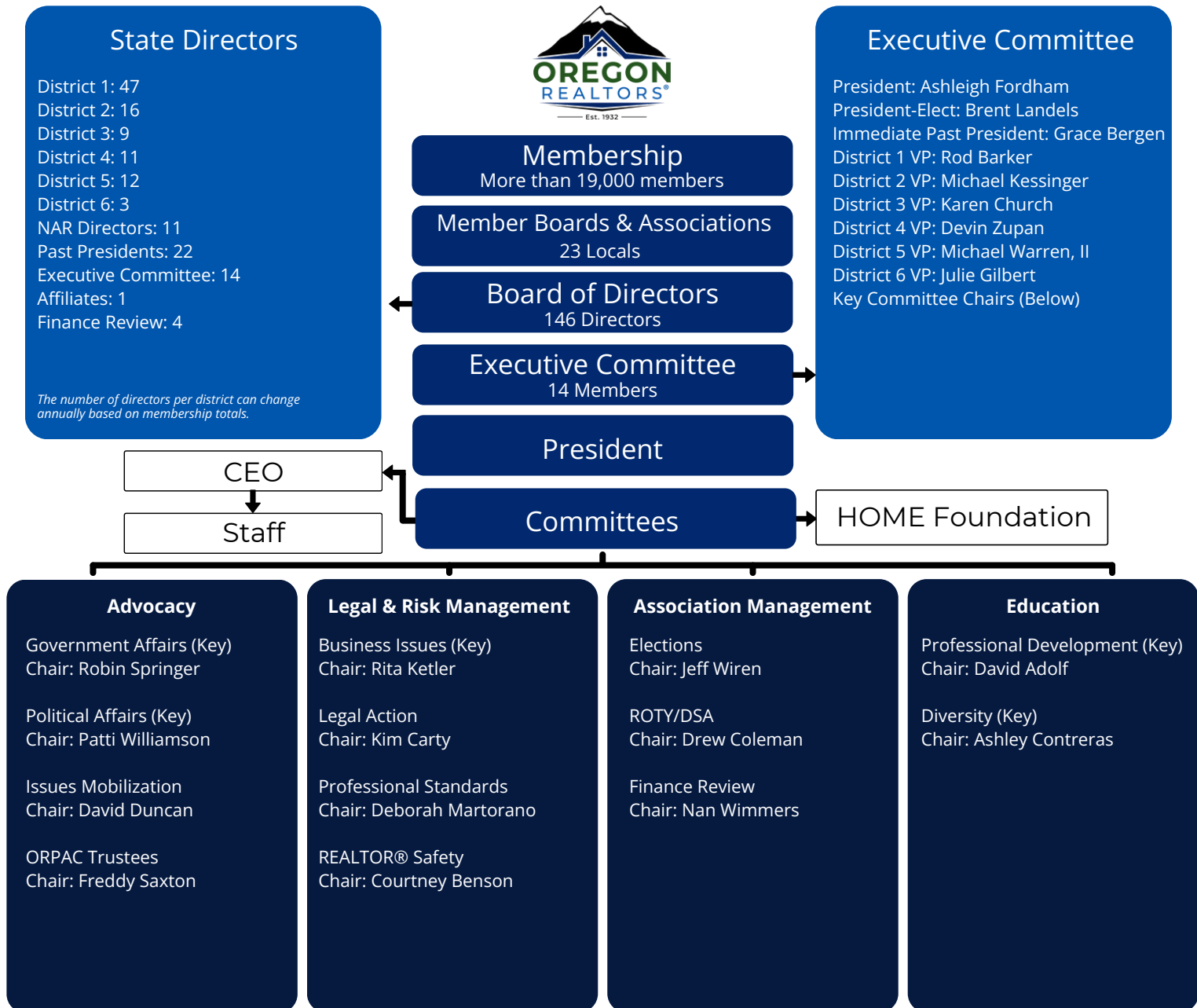
Membership: Chair (1 yr.), Vice-chair (1 yr.), Immediate Past Chair (1 yr.), up to 45 members (minimum of 20)(2 yrs.)

Term: 2 years

All committee members, excluding the Vice chair, Immediate Past Chair, and Chair, shall serve for two-year, staggered terms

Staff Liaison: Legal Affairs Director

# ORGANIZATION STRUCTURE







# MY TERM IS STARTING- NOW WHAT?

## **POLICY AND PROCEDURE**

Please read the Oregon REALTORS® [Bylaws](#), [Policy Manual](#) and [Governance Guide](#) for specific information regarding policy and procedures for volunteer positions.

## **MEETINGS--WHEN AND WHERE**

Oregon REALTORS® staff will provide you with calendars and meeting dates.

Regularly scheduled meetings include:

- Board of Directors - Spring Governance (April; Salem) and Fall Convention (late September or early October; locations vary)
- NAR Directors - Mid-Year (May, Washington, D.C.); Annual Conference (November, locations vary); all Oregon REALTORS® Board of Directors meetings
- Key Committees - Spring Governance (April; Salem) and Fall Convention (late September or early October; locations vary)
- Special Committees meet only as needed and use virtual options

## **ATTENDANCE AND ABSENTEEISM**

You are a volunteer member, and we depend on you to perform the requested duties of your volunteer position. We do understand that, from time to time, certain situations may arise that prevent you from doing so. Please alert your committee chair and staff liaison of any scheduled absences—such as vacation—as far in advance as possible so that an appropriate substitute may be found, if necessary. In the event of an unscheduled absence—illness or emergency—please alert your committee chair and staff liaison as soon as possible, preferably 24 hours before your scheduled meeting or event.

Punctual and regular attendance is a critical responsibility of each volunteer. Any tardiness or absence causes problems for fellow volunteers and staff. When a volunteer is absent, others must perform additional duties. No matter how skilled a volunteer, if they do not have a good attendance record, their contributions to the smooth functioning of Oregon REALTORS® boards & committees are diminished. The purpose of this policy is to promote the efficient operation and needed support of these vital positions and minimize unscheduled absences.

Any volunteer who fails to report to a scheduled meeting or event without notification to the chair or Oregon REALTORS® staff liaison two or more times will be considered to have voluntarily terminated their position.



# MY TERM IS STARTING- NOW WHAT?

Volunteers must sign in at the beginning of any in person meetings or announce their participation on virtual meetings. We ask you remain physically in the meeting room or on the virtual meeting through its duration. Of course, if you need a break, please don't hesitate to take one.

## **TRAVEL REIMBURSEMENT**

Key committee members who travel to live meetings will be reimbursed for round-trip mileage at the rate determined by the IRS. If a member travels more than 75 miles, one way, for a live meeting, lodging for one night may be reimbursed. (No travel reimbursement available to State Directors.)

To be reimbursed for travel, committee members must submit a "Member Travel Reimbursement Form" (Appendix C) within 30 days of the meeting, or within seven days of the meeting if the member wishes to have the reimbursement applied to RPAC. Note: Executive Committee travel reimbursement may differ

Please reference Section 3.6 of the Oregon REALTORS® [Governance Policy Manual](#) for the comprehensive travel reimbursement procedure.

## **VOLUNTEER FILES**

Your volunteer file, consisting of your application, committee appointment acknowledgement, statement of understanding and committee member acceptance form is confidential and consists of written documents retained by Oregon REALTORS®. The volunteer's file can only be viewed by Oregon REALTORS® staff. This file also contains basic contact information and records about your volunteer service with Oregon REALTORS®.

## **ENDING YOUR VOLUNTEER SERVICE**

You may resign from your volunteer service with the organization at any time. We request that you notify the Oregon REALTORS® staff, ideally two weeks prior to your departure and request that you complete an exit interview. We value your time, service and feedback.

## **PROBLEM-SOLVING PROCEDURE**

When a group of people work and volunteer together, problems may arise. It is important to all of us that such problems are solved as quickly as possible. Occasionally, however, it may be necessary to investigate certain problems in greater detail. Our problem-solving procedure provides you with the opportunity to have a review of any problem, dispute or misunderstanding that arises during the course of your volunteering.

# MY TERM IS STARTING- NOW WHAT?

In situations where differences arise between volunteers or volunteers and staff, it is advised to first try to resolve these differences amongst the parties involved.

If the grievance is regarding the Oregon REALTORS® or staff issues that can't be resolved, the CEO should be contacted.

## **DISCIPLINARY PRACTICES**

The following guidelines may be used in some instances at the sole discretion of Oregon REALTORS®:

- Step 1: Oral warning with documentation in the file
- Step 2: Written warning to individual and copy to file
- Step 3: Dismissal from committee

These guidelines are based on cumulative infractions, regardless of whether the infraction is of the same general nature as a previous warning. The use of these disciplinary practices in no way alters the fact that your volunteering with the Oregon REALTORS® is "at-will."

## **DISMISSAL**

Dismissal of a volunteer is a serious consideration. Before a volunteer is dismissed, attempts to reconcile the situation will be made including a meeting between the staff and volunteer involved. Dismissal of a volunteer may take place if a volunteer is unreliable, irresponsible, disruptive, demonstrates inappropriate behavior, or fails to adhere to the policies and procedures of Oregon REALTORS®.

## **CONFIDENTIALITY**

Volunteer Member and Oregon REALTORS® information is confidential. No Oregon REALTORS® committee proprietary information should be shared outside of Oregon REALTORS®. (i.e. contractual fees with industry partners, member disciplinary information, member contact information).



# MY TERM IS STARTING- NOW WHAT?

## **CONFLICTS OF INTEREST**

No member of Oregon REALTORS® Board of Directors, Executive Committee, or any Key Committees shall engage in discussion of any matter involving a conflict of interest transaction without first disclosing the conflict and obtaining the approval of the majority of the body present. In no event shall the member cast a vote for or against any matter involving a conflict of interest transaction. A conflict of interest transaction is any proposed business transaction with the Association in which the member has a direct or indirect interest.

## **POLICY AGAINST HARASSMENT**

Oregon REALTORS® is committed to maintaining a work environment free of unlawful harassment. Oregon REALTORS® prohibits harassment based on sex (including sexual harassment, gender harassment and harassment due to pregnancy, childbirth or related medical conditions) and harassment based on race, religion, creed, color, national origin or ancestry, physical or mental disability, medical condition, marital status, age, sexual orientation, or any other status protected under federal or state law or local ordinance or regulation. All such harassment is unlawful. The Oregon REALTORS® policy applies to all persons involved in the operation and prohibits unlawful harassment by any volunteer or employee of Oregon REALTORS®.

## **POLICY AGAINST SEXUAL HARASSMENT**

Sexual harassment is unwanted sexual attention of a persistent or offensive nature made by a person who knows, or reasonably should know, that such attention is unwanted. Sexual harassment includes sexually oriented conduct that is sufficiently pervasive or severe to unreasonably interfere with an employee's job performance or create an intimidating, hostile, or offensive working environment. While sexual harassment encompasses a wide range of conduct, some examples of specifically prohibited conduct include:

- Threatening, directly or indirectly, to retaliate against a volunteer, if the volunteer refuses to comply with a sexually oriented request;
- Engaging in sexually suggestive physical contact or touching another volunteer in a way that is unwelcome;
- Displaying, storing, or transmitting pornographic or sexually oriented materials using Oregon REALTORS® equipment, facilities or virtual meeting platforms;
- Engaging in indecent exposure; or
- Making sexual or romantic advances toward a volunteer and persisting despite the volunteer's rejection of the advances.



# MY TERM IS STARTING- NOW WHAT?

Sexual harassment can be physical and/or psychological in nature. An aggregation of a series of incidents can constitute sexual harassment even if one of the incidents considered on its own would not be harassing.

Volunteers are prohibited from harassing other volunteers or Oregon REALTORS® staff whether or not the incidents of harassment occur on Oregon REALTORS® premises and whether or not the incidents occur during working, meeting or event hours.

Sexual harassment can involve males or females being harassed by members of either sex. Although sexual harassment typically involves a person in a greater position of authority as the harasser, individuals in positions of lesser or equal authority also can be found responsible for engaging in prohibited harassment.

## Volunteer Responsibility:

If a volunteer believes he/she has been subject to sexual harassment or any unwanted sexual attention, he or she should:

- Make their unease and/or disapproval directly and immediately known to the harasser;
- Make a written record of the date, time, and nature of the incident(s) and the names of any witnesses;
- Report the incident to the Oregon REALTORS® CEO;
- All incidents of sexual harassment or inappropriate sexual conduct must be reported regardless of their seriousness.

## SUBSTANCE ABUSE

The possession, use or sale of illegal drugs is never acceptable in our business environment. Also, the abuse of prescription and over-the-counter drugs and alcohol can compromise your volunteer performance and conduct.

We recognize that substance abuse can be successfully treated. Seeking help or assistance is not considered grounds for discipline, but refusal to get help in certain circumstances may be. It is your responsibility to get professional help to improve your performance or conduct. Our success depends on your success, so please reach out if we can help.



# MY TERM IS STARTING- NOW WHAT?

## **VOLUNTEERS' CODE OF CONDUCT**

- We are committed to a diverse and inclusive volunteer community. Oregon REALTORS® know that different ideas, perspectives and backgrounds create a stronger and more creative volunteer community that delivers better results. To support an inclusive environment where volunteers feel empowered to share their experiences and ideas, we provide annual diversity training for our committee leadership and have formed the Diversity Committee, which serves to support diversity, equity, and inclusivity initiatives within our volunteer committees. We honor our diverse community of volunteers from varied backgrounds and identities, including, but not limited to: people of color, immigrant communities, people of all faiths and spirituality, people living with disabilities, all gender and sexual identities, and people of diverse ages.
- We are committed to working together towards creating a safe, supportive, and caring volunteer experience where we can learn from each other and grow in service to our membership & communities. If you feel you've experienced harassment due to identity, report the incident to the Oregon REALTORS® CEO.

## **VOLUNTEER EXPECTATIONS**

- Provide initial and updated contact information to your staff liaison.
- Read and respond timely to all communication sent by Oregon REALTORS® staff, committee chair, or vice-chair.
- Read any agendas and pertinent information received prior to the meeting and be ready to engage in collaborative discussion.
- If asked to present a report, be present and prepared.



## VOLUNTEER HANDBOOK ACKNOWLEDGEMENT

I, \_\_\_\_\_ have received and read the Oregon REALTORS® Volunteer Handbook. I understand what is expected of me and I will take the opportunity to ask any questions that arise during my term.

Signature of Volunteer \_\_\_\_\_

Date \_\_\_\_\_

## VOLUNTEER CONFIDENTIALITY

I agree to hold in confidence all information I become privy to regarding partner contracts, members, clients or staff of Oregon REALTORS®. I will not remove from the office of Oregon REALTORS® any electronic or written records, or copies thereof, without express permission of Oregon REALTORS®. I accept full responsibility for maintaining the confidential nature of all records, member contacts and information marked confidential.

I understand that I am personally responsible and liable for any violation of this agreement.

Date \_\_\_\_\_

Volunteer Signature \_\_\_\_\_

Print Name \_\_\_\_\_ Date \_\_\_\_\_

Oregon REALTORS® Representative Signature

\_\_\_\_\_

# APPENDIX C

Oregon REALTORS®

## Member Travel Reimbursement 2024

Must be received by Oregon REALTORS® no later than 30 days after date of event to be eligible for reimbursement.

### For Internal Use Only

Acct: \_\_\_\_\_

Program: \_\_\_\_\_

Sub-Program: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Meeting/Event: \_\_\_\_\_

Location: \_\_\_\_\_ Date(s): \_\_\_\_\_

Expenses	Date	Date	Date	Date	Date	Total
*Original Receipts Required						
Meals						
Lodging						
Transportation						
Mileage @ \$.655/mi						
Other						

Any additional details of travel **MUST** be described below:

\_\_\_\_\_  
\_\_\_\_\_

Total  
Expense  
  
Stipend  
Received  
  
Balance  
Owed to  
Oregon  
REALTORS®


Signature: \_\_\_\_\_ Approved By: \_\_\_\_\_



**INSTEAD OF BEING REIMBURSED, I expressly authorize Oregon REALTORS® to use all/part of this reimbursement to**

**invest in RPAC or the HOME Foundation. Please note: If an RPAC investment is selected, this form MUST be received at the Oregon REALTORS® office within seven (7) days of the Meeting/Event.**

RPAC: \$ \_\_\_\_\_

HOME Foundation: \$ \_\_\_\_\_

Contributions to RPAC are voluntary and are used for political purposes. You may refuse to contribute without reprisal and the National, Oregon, or local associations of REALTORS® will not favor or disfavor any member because of the amount contributed. 70% of each contribution is used by Oregon REALTOR® PAC to support state and local political candidates. Until Oregon REALTOR® PAC reaches its RPAC goal, 30% is sent to National RPAC to support federal candidates and is charged against your limits under 2 U.S.C. 441a; after the Oregon REALTOR® PAC reaches its RPAC goal, your entire contribution will be used to support state and local candidates. Contributions are not deductible for income tax purposes. ORS 316.102 provides for a credit against state taxes of up to \$50 per individual or \$100 per joint return for contributions to political committees.



## CONFLICT OF INTEREST STATEMENT

I affirm the following:

I have received a copy of the Oregon REALTORS® Conflict of Interest Policy

I agree to comply with the policy

If a conflict of interest arises, I am aware that there is a Disclosure Form to complete and give to the Chairperson of the Key Committee, or the Oregon REALTORS® President or CEO.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

# APPENDIX E

## CONFLICT OF INTEREST DISCLOSURE FORM (Complete to disclose conflict)

No member of Oregon REALTORS® Board of Directors, Executive Committee, or any Key Committees shall engage in discussion of any matter involving a conflict of interest transaction without first disclosing the conflict and obtaining the approval of the majority of the body present. In no event shall the member cast a vote for or against any matter involving a conflict of interest transaction. A conflict of interest transaction is any proposed business transaction with the Association in which the member has a direct or indirect interest, including:

- As a result of the transaction with the Association, a member will or could gain or lose personal financial benefit.
- The member or the member's immediate family has an ownership interest or voting rights in a business organization directly or indirectly affected by the transaction. An ownership interest is defined as holding an ownership interest of more than 1 percent of the business organization.
- A person who is related to the member or a business associate of the member is a party to the transaction.
- Another entity of which the member is a director, officer or trustee is a party to the transaction

A conflict of interest shall not exist as a result of the normal operations of the member's Local Association.

I have the following conflict of interests, or potential conflicts of interests, to report:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_



