

GLC Property Management Policies and Procedures Manual

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Introduction

GLC Property Management, Inc. (GLC) is a for-profit corporation committed to delivering superior property management services and fostering industry leadership. This Policies and Procedures Manual outlines the operational framework, corporate policies, and strategic guidelines that drive GLC's success. It serves as a comprehensive resource for employees, clients, and stakeholders to ensure consistency, compliance, and alignment with GLC's mission to maximize client value and operational efficiency.

Disclaimer

The primary governing document of GLC Property Management, Inc. is the Corporate Bylaws. This Manual supplements the Bylaws by providing detailed procedures for implementation. In the event of any conflict between this Manual and the Bylaws, the Bylaws shall govern.

Administration

Corporate Governance

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- Board of Directors: Comprises elected executives (President, Vice President, Secretary, Treasurer) and regional representatives, responsible for strategic oversight and policy approval.
- Governance Principles: Emphasize transparency, accountability, and shareholder value.

Executive Leadership

- Roles:
 - President: Leads strategic vision and represents GLC externally.
 - Vice President: Supports the President and oversees specific initiatives.
 - Secretary: Maintains corporate records and compliance documentation.
 - Treasurer: Oversees financial strategy and reporting.
- Responsibilities: Ensure alignment with corporate goals, regulatory compliance, and client satisfaction.

Regional Management

- Regional Vice Presidents (RVPs):
 - Act as key liaisons between corporate headquarters and regional offices.
 - Drive client acquisition, retention, and operational performance in their regions.
 - Submit quarterly performance reports to the Board.

Committees

- Formation and Oversight: Committees are established by the Board to address specific business functions.
- Appointment of Chairs: Selected based on expertise, performance, and alignment with GLC's goals.
- Key Committees:
 - Executive Committee: Advises on high-level strategy and operations.
 - Client Services Committee: Enhances client experience and satisfaction.
 - Compliance and Standards Committee: Ensures adherence to industry regulations.
 - Finance Committee: Manages budgeting and financial strategy.
 - Professional Development Committee: Oversees training and certification programs.
 - Marketing and Communications Committee: Drives brand visibility and client engagement.
 - Government Relations Committee: Monitors regulatory changes impacting the industry.
 - Technology and Innovation Committee: Advances digital tools and operational efficiency.
 - Strategic Growth Committee: Focuses on expansion and market opportunities.
- Committee Operations:
 - Meet quarterly, maintain detailed minutes, and report to the Board.
 - Subcommittees may be formed for specialized tasks.
 - Open application process for committee membership, with clear eligibility criteria.

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National Office Operations

- Key Roles:
 - Chief Executive Officer (CEO): Leads overall operations and reports to the Board.
 - Chief Operating Officer (COO): Manages day-to-day operations and staff.
 - Chief Financial Officer (CFO): Oversees financial planning and risk management.
 - Client Success Manager: Supports client relations and regional office coordination.
 - Training and Development Director: Manages professional development programs.
 - Marketing and Communications Director: Oversees branding and external communications.
 - Technology Director: Drives IT strategy and digital transformation.
- Operational Framework:
 - Focus on client-centric service delivery and operational excellence.
 - Annual performance evaluations to optimize efficiency and client outcomes.

Corporate Policies

- Code of Ethics: Mandates integrity, professionalism, and client-first principles.
- Gift and Hospitality Policy: Regulates acceptance of gifts to prevent conflicts of interest.
- Whistleblower Policy: Protects individuals reporting unethical or illegal activities.
- Conflict of Interest Policy: Requires disclosure and recusal for potential conflicts.
- Document Retention and Destruction Policy: Outlines secure storage and disposal protocols.
- Anti-Harassment Policy: Ensures a respectful and inclusive workplace.
- AI Usage Policy: Governs ethical use of artificial intelligence in operations.

Financial Management

Client Revenue and Fees

- Service Fees: Determined by market rates and service scope, reviewed annually.
- Authority to Set Fees: Board-approved, with input from the Finance Committee.
- Billing Schedule: Invoices issued monthly, with payment due within 30 days.
- Late Payment Policy: Penalties applied per contract terms.
- New Client Onboarding Fees: May include setup fees, prorated for partial years.

Non-Client Revenue Streams

- Sponsorships and Partnerships: Secured through industry events and publications.
- Advertising: Offered on GLC's digital platforms and publications.
- Data Licensing: Client-approved data shared with partners under strict privacy protocols.

Expense and Reimbursement Policies

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- Travel Reimbursement: Covers approved business travel, with pre-approval required for expenses over \$500.
- Expense Reporting: Requires itemized receipts and submission within 30 days.

Payment and Billing Procedures

- Payment Methods: Accepted via ACH, credit card, or check through a secure portal.
- Client Billing: Automated invoicing with clear payment terms.

Corporate Giving and Community Engagement

- GLC Community Fund: Supports local housing and community development initiatives.
- Fundraising Events: Organized to enhance brand visibility and community impact.

Accounting and Financial Reporting

- Standards: Adheres to GAAP and undergoes annual third-party audits.
- Reporting: Monthly financial statements provided to the Board and key stakeholders.

Investment and Risk Management

- Investment Strategy: Managed by the Finance Committee, prioritizing diversified, low-risk portfolios.
- Risk Management: Regular assessments to mitigate operational and market risks.

Annual Conferences and Events

Event Scheduling and Planning

- Annual Client Conference: Held in Q4 (October/November) to showcase services and industry trends.
- Broker Summit: Targeted event for property management firm leaders, held biannually.

Cancellation and Refund Policies

- Client Conference: Full refunds for cancellations 60 days prior; 50% refunds within 30 days.
- Broker Summit: Non-refunded within 14 days of the event.

Executive and Staff Participation

- Complimentary Access: Provided for executives, key staff, and top-tier clients.
- Participation Requirements: Executives deliver keynotes or workshops.

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Event Staffing and Support

- Dedicated event team ensures seamless logistics and client experience.

Event Planning Committee

- Comprises representatives from marketing, client services, and operations.
- Plans agenda, secures speakers, and coordinates sponsorships.

Venue Selection Criteria

- Chosen 2–3 years in advance based on capacity, accessibility, cost, and alignment with GLC's brand.

Professional Development and Training

Training Program Overview

- Designed to enhance employee and client skills in property management, compliance, and technology.

Fee Structure

- Varies by program, with discounts for bulk registrations and loyal clients.

Professional Certifications and Designations

- Certifications: Certified Support Specialist (CSS), Residential Management Professional (RMP), Master Property Manager (MPM), Certified Residential Management Company (CRMC).
- Application Process: Streamlined through an online portal, with clear eligibility criteria.

Firm Compliance Requirements

- Branch offices must maintain national standards for certification and service delivery.

Instructor Standards and Conduct

- Qualifications: Industry experts with proven teaching ability.
- Code of Conduct: Emphasizes professionalism, impartiality, and respect.

Continuing Education Credits

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- Approved by state licensing boards and tracked via GLC's learning management system.

Additional Training Programs

- Includes webinars, in-person workshops, and on-demand courses tailored to industry needs.

GLC Scholarship Program

- Darryl Kazen Memorial Scholarship: Funds training for high-potential employees and clients.

Marketing and Brand Management

Brand Identity and Trademarks

- GLC logos and trademarks are protected; usage requires approval from the Marketing Committee.

Corporate Communications

- External Communications: Highlight GLC's value proposition through press releases and campaigns.
- Client Portal: Provides updates, resources, and discussion forums.
- Publications: Monthly newsletters and annual industry reports.

Advertising and Sponsorships

- Rates: Competitive, with tiered pricing for clients and partners.
- Opportunities: Available in publications, events, and digital platforms.

Trade Shows and Exhibitions

- GLC participates in major industry events to showcase services and attract clients.

Client and Stakeholder Engagement

Client Membership Programs

- Standard Membership: Access to core services and resources.
- Premium Membership: Includes enhanced support, training discounts, and event perks.

Stakeholder Categories

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- Clients: Property management firms and individual professionals.
- Partners: Affiliate organizations, vendors, and industry stakeholders.
- Honorary and International Members: Recognized for contributions or global engagement.

Client Onboarding and Support

- Streamlined onboarding with dedicated account managers.
- Ongoing support through regional offices and the client portal.

Regional and Local Operations

Regional Office Structure

- Operates under corporate oversight, with RVPs leading local teams.

Performance Monitoring and Support

- Probation Status: Applied to underperforming offices, with corrective action plans.
- Recertification: Required every 3 years to maintain operational standards.

Operational Guidelines

- Success Guide: Provides templates and resources for regional operations.
- Database: Centralized system for client and operational data.

Incentive Programs

- Rewards for client acquisition, retention, and operational excellence.

Awards and Recognition

- Client Excellence Awards: For outstanding property management performance.
- Partner of the Year Award: Recognizes impactful vendor or affiliate contributions.
- Leadership Recognition: Honors executives and RVPs for strategic achievements.
- Employee and Team Awards: Celebrate internal contributions to GLC's success.

Information Management and Communications

Corporate Website and Digital Platforms

- Serves as the primary hub for client resources, event registration, and job listings.

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Publications and Client Updates

- Distributed monthly to keep clients informed of industry trends and GLC updates.

Data Privacy and Security

- Adheres to GDPR and CCPA standards for client data protection.

Record Retention and Disposal

- Follows a 7-year retention policy for financial and client records, with secure disposal protocols.

Appendices

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15. Corporate Travel Policy
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19. Partner Code of Conduct
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22. Community Advocacy Fund Guidelines
23. Artificial Intelligence Usage Policy
24. Corporate Bylaws
25. Event Photography and Media Release Form
26. Content Creator and Presenter Agreement