



# PREP HANDBOOK

**Working Together**  
at the local level of the  
Property Records Industry

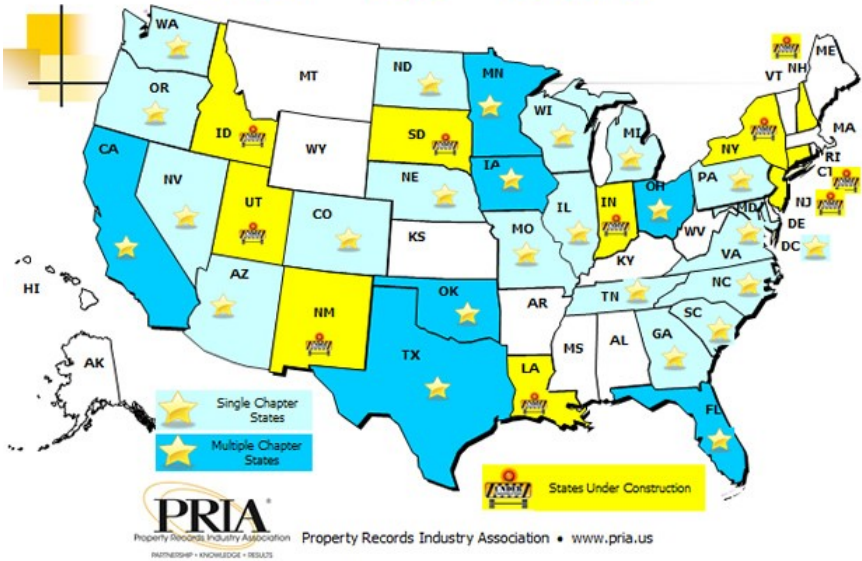
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**Carolyn Ableman, PREP National Coordinator**  
[ableman@pria.us](mailto:ableman@pria.us) [www.pria.us](http://www.pria.us)  
Phone 206-972-8451



# PREP "Star" States



Working Together

*Building industry partnerships  
at the local level*



PREP makes it happen!



## **What is PRIA? Partnership – Knowledge – Results**

The Property Records Industry Association (PRIA) is a unique business and government industry partnership whose members work together to identify issues, define problems and develop solutions. Multiple perspectives on industry issues are heard and debated. Consensus is reached, leading to the development and adoption of industry white papers, standards, best practices and model legislation for the property records industry.



## **What is PREP? Working Together at the Local Level**

**PREP provides a structured forum for stakeholders of the property records industry to meet and work together more effectively.**

In 2002 it became evident that cooperation and communication needed to be improved between industry stakeholders at the local level. In addition, a way was needed to share perspectives and information between national and local industry participants.

Supported by the success of PRIA at the national level, an alliance was formed by the American Land Title Association (ALTA), the American Escrow Association (AEA), the International Association of Clerks, Recorders, Election Officials & Treasurers (IACREOT) and the National Association of County Recorders, Election Officials & Clerks (NACRC) for the purpose of creating local industry workgroups.

To provide a permanent structure and ongoing support, in 2004 this project became an official workgroup structured under the PRIA umbrella and named the Property Records Education Partners (PREP), with local units identified as PREP Chapters. PREP has its own operating rules and PRIA membership is not required for PREP participation. PREP web pages [www.pria.us](http://www.pria.us)

**“It is the Industry that binds us—it is the Partnership that unites us. What would happen if we all worked together to address industry-related issues?”**

Mark Monacelli, PRIA Past President and PREP founder

Title, escrow, financial services and recording sectors of the property records industry must work together for the public to consummate real estate transactions. Today’s expanding technology and market place changes require industry stakeholders to work together more efficiently, ensuring quality service to the public.

National industry concerns also affect local property industry stakeholders. Through PRIA, PREP chapter members have opportunity to learn more about national industry issues and participate in developing solutions.

## **PREP = Working Together**

All sectors of the industry are invited to participate in PREP.

- Recorders,
- Assessors
- Title companies,
- Escrow agents
- Lenders,
- Underwriters,
- Product and service providers

PREP Chapters do not have membership dues, and each chapter determines its leadership, meeting schedule and agendas. PREP operating rules provide additional details.

[www.pria.us](http://www.pria.us)

## **PREP Committee Co-Chairs (beginning in 2016)**

Susan Kramer, Government, Olmsted  
County, Minnesota  
[kramer.susan@co.olmsted.wa.us](mailto:kramer.susan@co.olmsted.wa.us)

Benjamin Lincoln, Business, ALTA,  
[Benjamin@alta.org](mailto:Benjamin@alta.org)

## **Organizing a PREP Chapter**

To organize a new PREP Chapter, an industry member from the government sector and a member from the industry's business sector act as temporary co-chairs.

### **Contact the PREP National Coordinator [cableman@pria.us](mailto:cableman@pria.us)**

- Develop an invitation list (include all industry sectors)
- Set the meeting date, time and location
- Create and e-mail invitation flier or letter
- Prepare organization meeting agenda
- Have attendees sign-in (include e-mail addresses)
- Assign someone to take minutes of the meeting
- Conduct meeting – organizers will preside until co-chairs are selected by members

### **Members will decide:**

- Chapter name and geographical area
- Chapter meeting schedule
- Who will serve as chapter co-chairs
- Terms of office for co-chairs

### **Report back to the PREP National Coordinator**

- Send minutes, attendance lists and meeting schedules to [cableman@pria.us](mailto:cableman@pria.us)

Organizers should contact the PREP National Coordinator

for assistance prior to beginning the chapter organizational process. Although PREP Operating Rules [www.pria.us](http://www.pria.us) state that chapters should include a PRIA business member and a PRIA government member, chapter co-chairs are not required to be members of PRIA. There are no membership dues for PREP participants.

# Worksheet

## Scheduling the PREP Organizational Meeting

Organizer – Government \_\_\_\_\_

Organizer – Business \_\_\_\_\_

Proposed meeting date & time \_\_\_\_\_

Meeting Place/Address (& Host name if other than organizers)  
\_\_\_\_\_

Invitation lists compiled by (date) \_\_\_\_\_ Person Responsible \_\_\_\_\_

**Get help! Identify who can help you compile invitation lists for:**

Recorders \_\_\_\_\_

Assessors & other govt. \_\_\_\_\_

Title Companies \_\_\_\_\_

Escrow Agents \_\_\_\_\_

Lenders/Banks \_\_\_\_\_

Vendors/Service Providers \_\_\_\_\_

Others \_\_\_\_\_

### Meeting Details

**Invitation/Save the Date Notice:** Person(s) Responsible \_\_\_\_\_  
Ready by \_\_\_\_\_ Send out by \_\_\_\_\_

**Meeting Agenda:** Person(s) responsible \_\_\_\_\_ finalized by \_\_\_\_\_

**Other Details:**

**Note:** *Samples of invitations and agendas are included in this handbook. They are also available on the PREP web pages at [www.pria.us](http://www.pria.us)*

## Sample Invitation Letter

DATE:

TO:

As a fellow member of the local property records industry, we invite you to join us in building a more positive industry-wide relationship. By meeting locally with other members of the industry as a PREP chapter, we have the opportunity to focus on local industry problems and together find solutions. Working together, we can address issues, including legislation, more effectively. All industry sectors are invited to participate.

What is PREP? PREP Chapters provide the structure to bring business and government industry sectors together at the local level, much the same as PRIA has successfully done at the national level. Through PREP we will stay better informed about national industry issues and standards. Sharing information and addressing issues at PREP meetings will help each of us operate more efficiently.

Good communication between local industry stakeholders is essential. In addition, it is important that perspectives and information are shared between national and local industry levels. Recognizing these needs and supported by the success of PRIA at the national level, an alliance was formed in 2002 by ALTA, AEA, IACREOT and NACRC for the purpose of creating local industry workgroups to bring business and government stakeholders together.

To provide support and a permanent structure, in 2004 this project became an official workgroup structured under the PRIA umbrella, named the Property Records Education Partners (PREP), with local units identified as PREP Chapters. PREP has its own operating rules and PRIA membership is not required for PREP participation.

There are no membership dues for PREP Chapter participants. All that is required is your participation. Plan to attend our meeting on (insert date and time) at (insert location; include map if appropriate) and invite other industry members you know to join you in attending.

Sincerely,  
(names and titles of organizers – include e-mail addresses)





**Sample**

## ***SAVE THE DATE***

**Date:**

**Time:**

**Location:**

### **The Property Records Education Partners (PREP) PREP Chapter Organization Meeting**

The Property Records Education Partners (PREP) is a business and government local industry partnership, sponsored by the Property Records Industry Association (PRIA). Good communication between local industry stakeholders is essential. In addition, it is important that perspectives and information are shared between national and local industry levels. Recognizing these needs and supported by the success of PRIA at the national level, an alliance was formed in 2002 by ALTA, AEA, IACREOT and NACRC for the purpose of creating local industry workgroups to bring business and government stakeholders together.

To provide support and a permanent structure, in 2004 this project became an official workgroup structured under the PRIA umbrella, named the Property Records Education Partners (PREP), with local units identified as PREP Chapters. PREP has its own operating rules and PRIA membership is not required. PREP chapters are organized by local industry members with PRIA's assistance. All industry sectors are invited to participate.

As sponsors of the PREP chapter for our area, we invite and encourage you to attend the organizational meeting on \_\_\_\_\_.

PREP benefits all sectors of the local property industry. All that is required is the participation of local industry members. Please "save the date" and join us as we move forward with PREP – industry members working together is what it's all about!

**Organizer name and title**  
**Business Sector**  
e-mail address/phone

**Organizer name and title**  
**Government Sector**  
e-mail address/phone

## Organizational Meeting Guidelines

- Welcome & Introductions (refreshments are nice)
- Attendees sign in. Save sign-in time by printing out the invitation list (include e-mail addresses and ask for those you don't have.) Attendees can sign or initial next to their names on the pre-printed list, saving them the time required to write in all the information.
- **Organizers will serve as temporary co-chairs and conduct meeting until members select chapter co-chairs**
- Assign someone to take minutes
- Brief review of PRIA's purpose and mission
- Brief review of PREP's mission and benefits
- Discuss purpose of your new PREP chapter – what can be accomplished
- Decide what geographical area your chapter will include
- Decide how frequently you will meet and what time of day
- Will there be one meeting location or will you rotate meeting locations
- Meals/refreshments? (Members can be charged for expenses)
- Agree on name for your new chapter
- Decide terms of office for your co-chairs
- Nominate and select official co-chairs for your chapter (some chapters also select a secretary to be responsible for meeting notifications and minutes.)
- Schedule next meeting date, time and location
- Identify topics for discussion – agenda items
- Make assignments as needed
- Send minutes, attendance list, meeting schedule and other info to PREP National Coordinator [ableman@pria.us](mailto:ableman@pria.us)



## **Sample Agenda for Organizational Meeting**

- Host(s) Name(s) & Location
- Date & Time

### **Welcome, Registration & Refreshments**

#### **Introduction to PRIA and PREP**

- Review of PREP's purpose & mission

#### **How PREP can help us work better together:**

- local issues and mutual concerns
- communications and networking
- education/programs
- legislative issues

#### **Moving Forward as a PREP Chapter:**

- Chapter name
- Geographical area to be included
- Selection of Chapter Co-chairs
- Meeting schedule and location
- Next meeting date, time, location, host
- Suggestions for agenda items
- Assignments

### **Adjournment**

**Congratulations, your PREP Chapter is on its way!  
Please report back to the National PREP Coordinator.**

## Sample Agenda for Regular Meeting

### PREP Chapter Name

Date & Time

Hosted by

Meeting location address

### Registration, Welcome & Introductions

Brief review of prior meeting & approval of minutes

### Presentation and/or facilitated discussion:

- Industry Local & State Issues \*  
\*Topics are identified or suggested by chapter participants. New and/or innovative processes, transaction problems and state legislative initiatives, are some of the items you would include here.
- Sharing of information/handouts

### Presentation and/or facilitated discussion on:

- Industry National Issues \*  
\*Suggested national topics and pertinent information are provided to chapters on the PREP web page at [www.pria.us](http://www.pria.us).
- Chapter questions, concerns and suggestions for submission to Property Records Industry Association (PRIA)

### Next Chapter Meeting:

- When
- Where – Host
- Suggested agenda items
- Assignments

### Adjournment

## PREP Chapter Co-Chairs

A co-chair from the business sector and a co-chair from the government sector will be selected by chapter participants. The co-chairs are not required to be members of PRIA.

### Responsibilities of PREP Chapter Co-Chairs:

- Presiding and/or facilitating at chapter meetings;
- Scheduling chapter meetings based on the frequency determined by chapter participants;
- Creating and distributing notices and agendas;
- Making arrangements for minutes to be taken, transcribed and distributed;
- Ensuring that chapter participant information is gathered at each meeting, including updating contact information;
- Promoting chapter participation;
- Communicating with the PREP National Coordinator;
- Forwarding meeting schedules, agendas, chapter minutes and participant lists to PREP National Coordinator on a timely basis.

### After the PREP Chapter organizational meeting, Co-chairs are to forward the following to the National PREP Coordinator:

- Chapter name & structure (local, regional, state?)
- Co-Chairs selected, including contact information
- Chapter participant names, including contact information
- Meeting schedule (how often/when will you meet?)
- Agenda and minutes of your organizational meeting
- Suggestions, comments or questions from your Chapter

**It is important that the co-chairs keep the National PREP Coordinator informed about chapter activities. Any changes in meeting schedules or co-chairs should be reported immediately to the National Coordinator**

Through PRIA, your Chapter has opportunity to receive information concerning national industry standards, adopted or proposed, and materials relating to best practices and model legislation. **Program assistance is available covering industry topics such as eRecording, privacy issues, mortgage fraud, federal legislation, TRID, “predictable fees” (flat recording fees) and other items of interest.**

Carolyn Ableman, PREP National Coordinator  
[ableman@pria.us](mailto:ableman@pria.us) Phone 206-972-8451  
[www.pria.us](http://www.pria.us)



## **OPERATING RULES FOR PRIA WORK GROUP Property Records Education Partners (PREP)**

The purpose of the Property Records Industry Association (PRIA) is to bring together the major participants in the property records industry, including public officials, associations and private concerns, to:

- Improve communication between industry stakeholders
- Facilitate recordation and access to public property records
- Formulate and disseminate model standards, systems and procedures
- Encourage adoption of model standards
- Track relevant proposed legislation to facilitate appropriate input
- Initiate and lead development of technical standards
- Establish and lead education programs for all sectors of the industry
- Preserve the integrity of public property records

Pursuant to Article IV Paragraph 16 of PRIA's Bylaws, the Property Records Education Partners (PREP) has been designated a PRIA Work Group by Resolution of the PRIA Board of Directors. The specific charge given to the PREP is to provide a structure to improve local working relationships, open/enhance lines of communication and expand education opportunities for property records industry participants at the local level.

Because the PREP involves other national organizations recited in the Resolution establishing it as a PRIA Work Group, and also because of the unique educational role envisioned for the PREP Work Group, the following operating rules shall apply to the PREP Work Group in lieu of the standard PRIA Operating Rules:

(1) Local property record industry working groups shall be organized through PREP, for the purpose of developing forums for the exchange of information at the local level. Such local working groups shall be referred to as PREP Chapters.

**(2) A PREP Chapter must include at least one PRIA member.**

(3) A PREP Chapter shall elect from its membership two Chapter Co-Chairs, one each from the government and business sector. The term of office of the Chapter Co-Chairs shall be determined by the Chapter

membership. Chapters shall advise the National PREP Coordinator immediately when a co-chair position is vacant or a change occurs.

4) Each PREP Chapter shall determine its own meeting schedule and frequency, as well as its own meeting agendas. **Chapters must schedule at least one meeting each year.** The National PREP Coordinator may suggest agenda items and presentations.

(5) Participation in a PREP Chapter shall not require payment of PRIA membership dues. Additionally, the PREP Chapters may not require payment of PREP membership dues. However, Chapter members may be charged fees by the PREP Chapters to recover specific Chapter costs, so long as the fees have been agreed to by the Chapter Co-Chairs and approved by the National PREP Coordinator.

**(6) Each chapter shall provide the National PREP Coordinator with a member/participant list, as well as meeting schedules, agendas and minutes on a timely basis. The National PREP Coordinator may establish reporting timelines.**

(7) Each chapter shall be provided with a copy of the PREP Operating Rules. Chapter participants shall be advised to read the PREP Operating Rules which shall also be posted on the PREP web pages at [www.pria.us](http://www.pria.us)

(8) At least twice per year, or at the request of the PRIA President, the National PREP Coordinator shall render a written report to the PRIA Board of Directors concerning the activities and accomplishments of the various PREP Chapters.

(9) Because of the unique status of the PREP within PRIA, the various PREP Chapters shall be permitted to pursue the following functions only:

- A. Provide a structure to improve local and national industry related relationships;
- B. Open/enhance lines of communication between local industry stakeholders and other bodies;
- C. Encourage local adoption of PRIA model legislation, standards and best practices;
- D. Expand education opportunities for property records industry participants at the local level.

(10) Formulation and development of national standards continues to be governed by the standard PRIA Operating Rules and the PRIA Intellectual Property Rights Policy. Accordingly, those functions are reserved to the appropriate PRIA Work Group or Committee and PREP Chapters are specifically forbidden from engaging in these activities.

Adopted by the PRIA Board of Directors – March 5, 2005