

New England CPE

The Zoom mtg. link will be sent with BOD Mtg Pkg

Board of Directors

July 16, 2026

ZOOM Mtg
Time: 10:00 – 11:00 am

MEETING MINUTES

1. Call to Order

2. Roll Call

NECPE Board of Directors (need 7 quorum)

Alkova, Viktoria (P)	Cobb, Mike (A)	Gandia, Laura (P)
Ash, Ethan (P)	Culver, Rose (P)	James, Bob (P)
Bacon, Matt (P)	Dano, Brian (P)	Lefebvre, Matt (P)
Boufford, Jeff (P)	DeMello, Kathy (P)	Nesmith, Laura (P)
		O'Connor, Brice (P)

1. Secretary's Report – R. Culver

- a. MOTION to accept the minutes of the May 2026 meeting were SECONDED and APPROVED.

2. President's Report – B. Dano

- a. B Dano has gone to most noon trainings.
- b. A dialogue has been opened with CT which doesn't have one centralized realtor association. What is the best way to get in front of CT? CID – CT Investment Division which is the most active in the state. CID Chair and CEO of the Realtor Organization. Scott Forte is working as a consultant with Kurt.
- c. There were some problems in the transition. Moodys dragged their feet. They released the domain to us the day before it was due. It put the Lease Up time a little back. By end of this month RPR connection needs to grant access. After July is finished with the daily office hours, they will still be available for support. Conducting trainings as new features are released. AI training. Auto notify clients what working on in a week or two. Chat takes hours to respond. B O'Connor said there is mixed feedback from Boulos. Search function by property and space type are confusing. Ongoing trainings as features .
- d. M Lefebvre. spoke with Kurt about the operating hybrid – what Moodys and Catylist was. Scott said we need to simplify. B O'Connor thought go back to singular list. Matt B. is there a way to set master listing be the record and us AI as a database – a supplemental DB to use. Like a pivot table in Excel – pull something together. M Lefebvre spoke about properties vs. listings. Listings are potentially individuated to resolve properties being tagged improperly; M Bacon suggested have a small meeting with Kurt to discuss.
- e. Phone support? M Lefebvre said send email and they call back. K DeMello happy with support and appearance.

- f. B O'Connor – talked to Kurt about subscriptions; auto emails soon. Chat is not an instant thing, takes hours.
- g. S Forte has set up shared word doc list of priorities. No visible tracker beyond the list; M Lefebvre will chat with Kurt. Task force meet on weekly or biweekly basis to run through list of priorities.
- h. B James suggested we establish an enhancements committee once get the tracker. All requests flow through list of criteria to evaluate requests to ensure consistency. He would be happy to act as the chair as he has done this before.
- i. B Dano make it more as there were 6 from Cibor side involved in the original contract.
- j. M Lefebvre from CIBOR NECPE task force and/or make it a standing committee. B Dano leans toward a task force. The task force will have Bob as Chair, Brian Dano, Matt L, Scott Forte, Brice and Matt B on it.

j

3. Treasurer's Report – J. Boufford

- a. MOTION to review the month end Financials for May and June 2026 were placed on file.
- b. Balance sheet is in order. Budget vs. Actual Income end at 48% for June. Expenses under 44%. Approved to place on file.

4. Office Administration Report – A. Ropes

- a. A Ropes has been collecting NECPE dues and have paid LeaseUp the \$ 92,500 without having to borrow money. Moodys final bill is \$ 74,000 and at this point not sure if NECPE will have to borrow money for that or not. To date collected about 40% of the dues. Reminders will be sent to those who haven't paid by end of this week giving them another week to pay before they are shut off.
- b. Lease Up is working on admin dashboard to improve it. Currently A Ropes can activate and inactivate members, change emails, move people into new cos and do password resets for people who don't receive the pw set email. Download of the membership needs to be cleaned up. There are approximately 2,000 records making it difficult to sort through. LU is are working in the future for the admin to be able to send bulk emails to different membership groups which is not currently possible. M Lefebvre wondered if NECPE could look into cc based model for auto charges; Kurt says able to have it on platform.

5. New Business

- a. K DeMello has searched office space and about half of the comps have no pricing, not sure how to resolve. Users need to put in accurate information. E Ash – Crexi free to list but can't access data. Loopnet no access to comp data. B O'Connor said issue with lease comps. and would be challenging to mandate. B Dano – not sure if it is because of Moodys transfer or because of members.

6. Adjournment at 10:44 am.