

# TASK FORCE REPORT



Date: Tuesday March 15<sup>th</sup> 2016

## **REALTOR® Action Fund Investment Participation Fund Task Force**

The REALTOR® Action Fund Investment Participation Fund Task Force was appointed on June 1<sup>st</sup>, 2015 with the following charge:

### **MISSION STATEMENT**

The REALTOR® Action Fund Investment Participation Task Force will review, develop, and adopt fundraising strategies to strengthen and enhance RAF's current fundraising efforts. The Task Force will develop for approval a final list of recommendations to ultimately increase contribution and participation in the REALTOR® Action Fund fundraising efforts at the local Association level.

### **MEMBERS:**

#### **Judy Zeigler, Task Force Chair, 2015 PAF Chair**

Paul Cardus, AE, Silicon Valley AOR  
Annette Coffey, AE, East Valley AOR  
Phil Hawkins, AE, Pacific West AOR  
Peggy Mead, AE, Chico AOR  
Winnie Davis, 2015 RAF Chair,  
Lynn Heintz, 2015 IMPAC Chair  
Art Nellessen, Past CREPAC Chair  
Barbara Palmer, 2015 CREPAC Chair

**MEETING** - Tuesday, March 15<sup>th</sup>, 2016

### **STAFF**

Alexander Creel, Senior Vice President/Chief Lobbyist  
Julissa Gómez, Manager of Housing Opportunity and Fundraising  
Lisa Edwards, PAC Financial/Fundraising Coordinator

### **DISCUSSION**

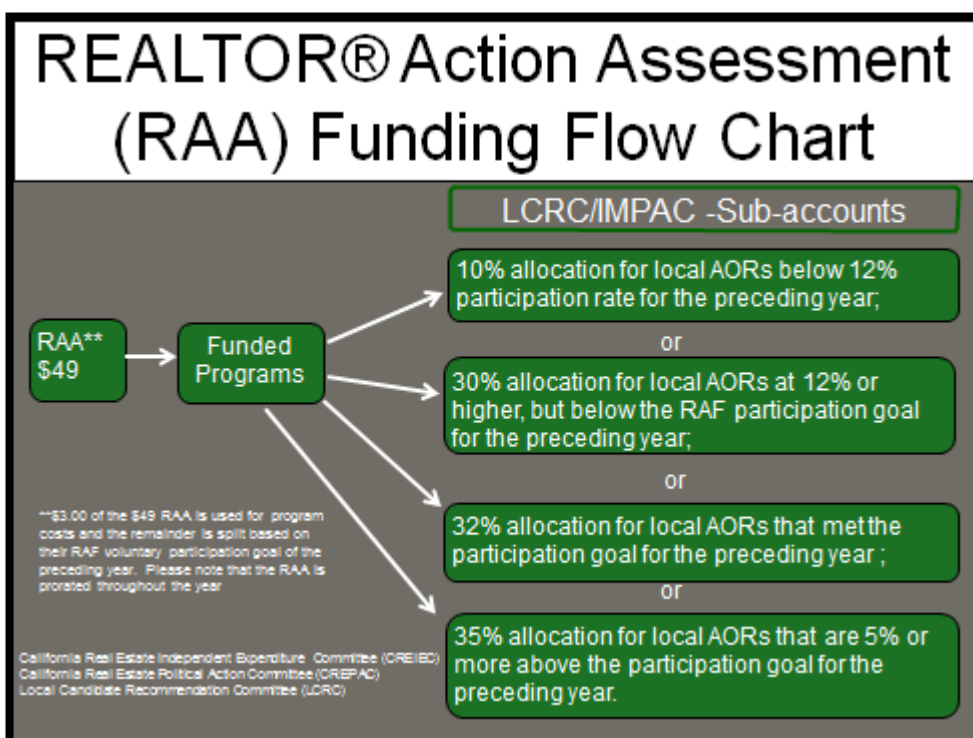
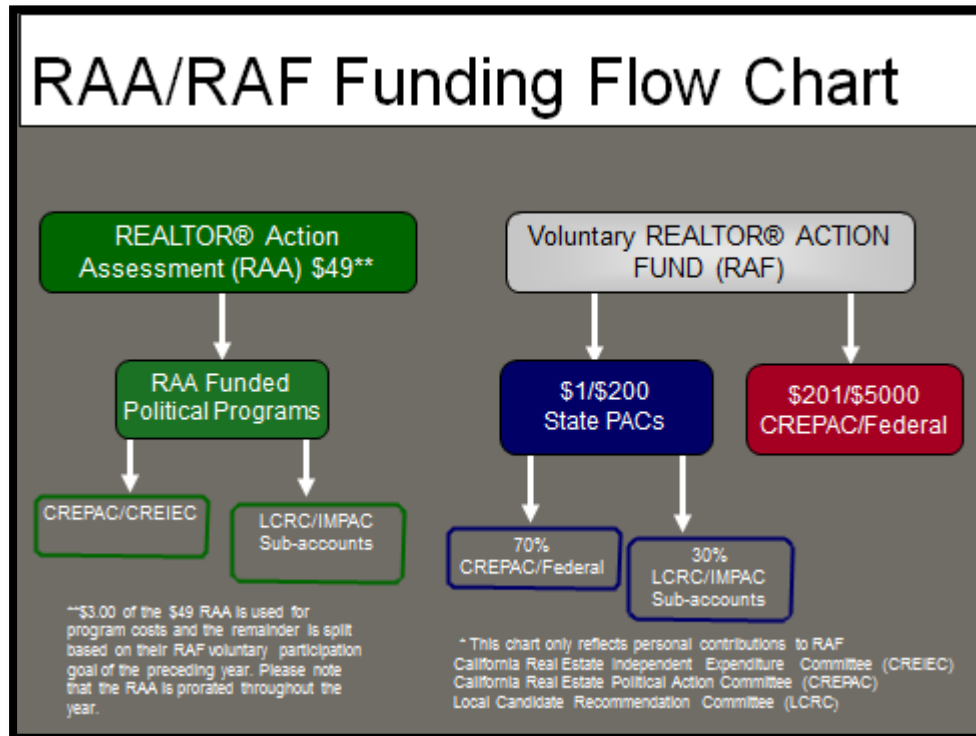
The RAF Investment Participation Task Force was formed in 2015 in response to the low voluntary RAF participation rate since the RAA was implemented in 2011. The Task Force has met several times over the course of this past year. The Chair, along with staff and Task Force members reviewed comments and feedback regarding the proposed 2016 January motion which created a tiered system of distribution for local Associations in LCRC sub-accounts. Based on feedback and comments, the Task Force met on March 16<sup>th</sup>, 2016 to develop a new tiered system for local Association's REALTOR® Action Assessment allocation.

**RECOMMENDATIONS**

That the portion of the REALTOR® Action Assessment allocated by IMPAC and CREPAC to local Association sub-accounts be based on a sliding scale beginning in 2017:

- 10% allocation for local Associations below 12% participation rate for the preceding year;
- 30% allocation for local Associations at 12% or higher, but below the REALTOR® Action Fund participation goal for the preceding year;
- 32% allocation for local Associations that met the participation goal for the preceding year;
- 35% allocation for local Associations that are 5% or more above the participation goal for the preceding year.

And, that the necessary amendments to the CREPAC and IMPAC bylaws to effect this change be presented to the Board of Directors for approval.



**Additional background Information regarding the proposed recommendations:**

The RAF taskforce reviewed, developed and adopted the following to assist local Associations in their existing fundraising efforts to increase RAF participation:

- C.A.R. will display local Associations' participation rates in alpha order by category of petite, small, medium 1, medium 2, large and jumbo at the BOD meetings near the RAF counter and in other locations, if possible, during the Fall Business Meetings and earlier, if possible.
- C.A.R. will provide Ribbons to C.A.R. Directors from local Associations that meet RAF's goal. Ribbons will be distributed during the 2016 Fall C.A.R. Business Meetings.
- Each local Association will receive a digital picture frame to display their own RAF contributors and participation rate. Picture frames will be mailed in summer of 2016.
- C.A.R. is committed to supporting local Associations in their fundraising efforts to help local association's to achieve their participation goals, C.A.R. provides the following resources:
  - a. Fundraising emails will continue to be sent to specific targets by C.A.R. throughout the year which will be aimed at non-contributors.
  - b. Planning is underway to expand the email campaign efforts to include targeting major investors.
  - c. Each local Association will continue to receive 3 hard copies of the RAF Toolkits via mail annually.
  - d. The digital version of the RAF Toolkit will continue to be available on the C.A.R. website.
  - e. Updated resource materials, some available for customization, which includes: fundraising templates, dues billing inserts, contribution forms, and visuals to measure fundraising will continue to be available online.
  - f. Updated RAF videos which can be used at new member orientations or other meetings will continue to be available online.
  - g. RAF Training by C.A.R. field mobilization staff will continue to be available for local Association staff and members.
  - h. RAF Training on AI360 (specific to California), RAF's contribution database, will continue to be available to AE's and GAD's.
  - i. Customized RAF contribution reports will continue to be available to help local Association staff and members develop a targeted fundraising strategy for contributors.
  - j. C.A.R. staff will continue to be available to assist local Association staff with the RAF dues billing portion of their dues billing statement.
  - k. RAF Leadership Team will continue to provide outreaches to every local Association below the RAF goal to provide them support and resources to help them reach the RAF participation goal.

**Below is a list of local Associations RAF participation dated as of Friday, April 8, 2016.**

	A	B	C	D	E	G	H
1	<b>2016 RAF % GOALS BY REGION</b>						
2	<b>Association Name</b>	<b>Region</b>	<b>Current 2016 # of Contributors</b>	<b>2016 Participation</b>	<b>Total 2016 Membership (based on September 2015)</b>	<b>2016 Total RAF \$\$</b>	<b>2015%</b>
3	<b>Region 1</b>						
4	DEL NORTE BOARD OF REALTORS	1	15	24%	62	931.00	13%
5	HUMBOLDT ASSOCIATION OF REALTORS INC	1	31	9%	339	6,934.80	12%
6	<b>Region 2</b>						
7	CHICO ASSOCIATION OF REALTORS INC	2	120	25%	479	7,944.00	24%
8	LASSEN ASSOCIATION OF REALTORS	2	22	55%	40	2,017.00	28%
9	OROVILLE ASSOCIATION OF REALTORS	2	40	35%	115	3,651.90	40%
10	PARADISE ASSOCIATION OF REALTORS	2	25	26%	96	1,725.00	34%
11	PLUMAS ASSOCIATION OF REALTORS	2	24	22%	110	3,335.24	29%
12	SHASTA ASSOCIATION OF REALTORS	2	162	24%	677	14,353.00	19%
13	SISKIYOU ASSOCIATION OF REALTORS INC	2	36	33%	110	4,062.80	28%
14	TEHAMA COUNTY ASSOCIATION OF REALTORS	2	44	36%	121	4,152.00	28%
15	TRINITY COUNTY ASSOCIATION OF REALTORS INC	2	7	17%	41	665.00	38%
16	<b>Region 3</b>						
17	EL DORADO COUNTY ASSOCIATION OF REALTORS INC	3	226	25%	913	15,095.26	19%
18	NEVADA COUNTY ASSOCIATION OF REALTORS	3	143	28%	506	17,864.00	36%
19	PLACER COUNTY ASSOCIATION OF REALTORS	3	294	11%	2,751	18,423.71	17%
20	SACRAMENTO ASSOCIATION OF REALTORS INC	3	892	15%	5,967	125,119.26	13%
21	SOUTH TAHOE ASSOCIATION OF REALTORS INC	3	61	22%	280	5,416.00	20%
22	SUTTER YUBA ASSOCIATION OF REALTORS INC	3	101	21%	470	15,512.00	22%
23	TAHOE SIERRA BOARD OF REALTORS	3	142	27%	532	7,376.00	27%
24	YOLO COUNTY BOARD OF REALTORS	3	34	10%	340	3,290.00	16%
25	<b>Region 4</b>						
26	COASTAL MENDOCINO ASSOCIATION OF REALTORS INC	4	40	43%	92	3,544.00	48%
27	LAKE COUNTY ASSOCIATION OF REALTORS	4	40	21%	187	3,744.00	39%
28	MARIN ASSOCIATION OF REALTORS INC	4	426	32%	1,324	22,578.70	42%
29	NORTH BAY ASSOCIATION OF REALTORS	4	725	24%	3,027	42,185.06	33%
30	NORTHERN SOLANO COUNTY ASSOCIATION OF REALTORS	4	123	14%	861	21,323.89	12%
31	SOLANO ASSOCIATION OF REALTORS INC	4	76	15%	507	12,134.00	28%
32	<b>Region 5</b>						
33	CONTRA COSTA ASSOCIATION OF REALTORS	5	663	18%	3,746	42,729.30	15%
34	DELTA ASSOCIATION OF REALTORS	5	79	11%	729	12,420.24	13%
35	<b>Region 6</b>						
36	ALAMEDA ASSOCIATION OF REALTORS	6	43	20%	220	6,290.00	23%
37	BAY EAST ASSOCIATION OF REALTORS	6	229	5%	4,822	21,795.26	23%
38	OAKLAND/BERKELY ASSOCIATION OF REALTORS INC	6	424	23%	1,827	24,100.71	19%
39	<b>Region 7</b>						
40	AMADOR COUNTY ASSOCIATION OF REALTORS	7	40	26%	155	4,922.00	19%
41	CALAVERAS COUNTY ASSOCIATION OF REALTORS	7	109	44%	250	7,808.51	40%
42	CENTRAL VALLEY ASSOCIATION OF REALTORS INC	7	166	8%	2,068	11,009.31	6%
43	LODI ASSOCIATION OF REALTORS INC	7	213	12%	1,709	12,625.00	11%
44	MARIPOSA COUNTY BOARD OF REALTORS	7	5	14%	35	245.00	17%

	A	B	C	D	E	G	H
2	Association Name	Region	Current 2016 # of Contributors	2016 Participation	Total 2016 Membership (based on September 2015)	2016 Total RAF \$\$	2015%
45	MERCED COUNTY ASSOCIATION OF REALTORS INC	7	84	16%	513	7,882.00	16%
46	TUOLUMNE COUNTY ASSOCIATION OF REALTORS INC	7	55	21%	261	7,298.66	18%
47	<b>Region 8</b>						
48	SAN FRANCISCO ASSOCIATION OF REALTORS	8	1,166	28%	4,212	62,303.82	22%
49	<b>Region 9</b>						
50	SILICON VALLEY ASSOCIATION OF REALTORS	9	980	22%	4,404	116,641.43	27%
51	<b>Region 10</b>						
52	MONTEREY COUNTY ASSOCIATION OF REALTORS	10	369	31%	1,207	17,893.00	9%
53	PAJARO VALLEY ASSOCIATION OF REALTORS INC	10	31	21%	146	4,226.00	19%
54	SAN BENITO COUNTY ASSOCIATION OF REALTORS	10	52	30%	173	4,625.00	25%
55	SANTA CRUZ ASSOCIATION OF REALTORS INC	10	328	28%	1,159	22,325.00	36%
56	<b>Region 11</b>						
57	CONEJO SIMI MOORPARK ASSOCIATION OF REALTORS INC	11	490	25%	1,988	23,838.00	19%
58	OJAI VALLEY BOARD OF REALTORS	11	17	15%	115	1,130.00	17%
59	SANTA BARBARA ASSOCIATION OF REALTORS	11	237	20%	1,159	33,980.90	22%
60	SANTA YNEZ VALLEY ASSOCIATION OF REALTORS	11	34	27%	126	3,298.00	25%
61	VENTURA COUNTY COASTAL ASSOCIATION OF REALTORS INC	11	389	22%	1,789	21,317.32	24%
62	<b>Region 12</b>						
63	BAKERSFIELD ASSOCIATION OF REALTORS INC	12	249	15%	1,657	34,659.26	17%
64	FRESNO ASSOCIATION OF REALTORS	12	359	13%	2,813	36,397.67	20%
65	KERN RIVER LAKE ISABELLA BOARD OF REALTORS	12	4	17%	23	196.00	0%
66	KINGS COUNTY BOARD OF REALTORS INC	12	44	23%	194	2,976.00	16%
67	MADERA COUNTY ASSOCIATION OF REALTORS	12	34	25%	138	3,209.26	31%
68	ORANGE BELT BOARD OF REALTORS	12	34	20%	169	2,656.00	21%
69	TEHACHAPI AREA ASSOCIATION OF REALTORS INC	12	48	45%	106	5,763.99	34%
70	TULARE COUNTY ASSOCIATION OF REALTORS	12	112	13%	848	13,708.00	8%
71	YOSEMITE GATEWAY ASSOCIATION OF REALTORS	12	54	45%	121	4,973.42	10%
72	<b>Region 13</b>						
73	ARCADIA ASSOCIATION OF REALTORS	13	308	14%	2,204	18,784.78	16%
74	GLENDALE ASSOCIATION OF REALTORS	13	157	10%	1,576	26,671.25	12%
75	PASADENA FOOTHILLS ASSOCIATION OF REALTORS	13	234	13%	1,832	32,044.01	9%
76	<b>Region 14</b>						
77	Idyllwild Association	14	7	16%	43	541.00	16%
78	INLAND VALLEYS ASSOCIATION OF REALTORS INC	14	573	18%	3,244	37,618.00	18%
79	SOUTHWEST RIVERSIDE COUNTY ASSOCIATION OF REALTORS	14	538	14%	3,893	46,180.73	11%
80	THE INLAND GATEWAY ASSOCIATION OF REALTORS	14	243	11%	2,127	16,527.00	13%
81	<b>Region 15</b>						
82	BIG BEAR ASSOCIATION OF REALTORS	15	60	24%	252	6,850.99	25%
83	EAST VALLEY ASSOCIATION OF REALTORS	15	190	14%	1,319	25,125.26	16%
84	HIGH DESERT ASSOCIATION OF REALTORS	15	166	16%	1,066	16,902.57	17%
85	JOSHUA TREE GATEWAY (formerly known as Desert Communities)	15	39	23%	171	2,650.00	18%
86	RIM O' THE WORLD ASSOCIATION OF REALTORS	15	92	50%	183	3,860.51	24%
87	<b>Region 16</b>						

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88	CITRUS VALLEY ASSOCIATION OF REALTORS	16	523	10%	5,136	28,351.23	21%
89	WEST SAN GABRIEL VALLEY ASSOCIATION OF REALTORS INC	16	360	14%	2,506	24,344.25	20%
90	<b>Region 17</b>						
91	BEVERLY HILLS/GREATER LA ASSOCIATION OF REALTORS INC	17	997	12%	8,655	128,210.57	12%
92	MALIBU ASSOCIATION OF REALTORS INC	17	293	36%	809	15,005.00	34%
93	SOUTHWEST LOS ANGELES ASSOCIATION OF REALTORS	17	27	6%	488	2,461.00	17%
94	<b>Region 18</b>						
95	BURBANK ASSOCIATION OF REALTORS	18	45	6%	708	5,473.32	21%
96	SOUTHLAND REGIONAL ASSOCIATION OF REALTORS INC	18	2,748	30%	9,192	101,208.02	16%
97	<b>Region 19</b>						
98	SANTA CLARA COUNTY ASSOCIATION OF REALTORS	19	487	9%	5,143	60,146.60	7%
99	<b>Region 20</b>						
100	NORTHERN CALIFORNIA COMMERCIAL ASSOCIATION OF REALTORS	20	23	15%	151	1,226.00	18%
101	REALTORS COMMERCIAL ALLIANCE OF ORANGE COUNTY	20	1	8%	13	49.00	19%
102	<b>Region 21</b>						
103	INGLEWOOD BOARD OF REALTORS INC	21	80	12%	680	3,498.58	11%
104	PALOS VERDES PENINSULA ASSOCIATION OF REALTORS	21	142	22%	648	21,334.00	22%
105	SOUTH BAY ASSOCIATION OF REALTORS	21	458	11%	4,019	27,546.77	15%
106	<b>Region 22</b>						
107	DOWNEY ASSOCIATION OF REALTORS INC	22	228	10%	2,187	16,602.00	6%
108	MONTEBELLO DISTRICT BOARD OF REALTORS INC	22	67	14%	485	5,267.00	13%
109	RANCHO SOUTHEAST ASSOCIATION OF REALTORS	22	250	14%	1,761	14,907.00	12%
110	<b>Region 23</b>						
111	PACIFIC WEST ASSOCIATION OF REALTORS	23	6,008	53%	11,428	313,561.98	41%
112	TRI-COUNTIES ASSOCIATION OF REALTORS	23	1,250	46%	2,693	66,771.99	19%
113	<b>Region 24</b>						
114	GREATER SAN DIEGO ASSOCIATION OF REALTORS	24	411	3%	12,704	47,769.26	6%
115	<b>Region 25</b>						
116	SAN MATEO COUNTY ASSOCIATION OF REALTORS	25	384	14%	2,655	54,797.26	19%
117	<b>Region 27</b>						
118	GREATER ANTELOPE VALLEY ASSOCIATION OF REALTORS INC	27	277	20%	1,393	25,734.50	20%
119	MAMMOTH LAKES BOARD OF REALTORS INC	27	32	23%	137	3,477.00	18%
120	RIDGECREST AREA ASSOCIATION OF REALTORS INC	27	59	88%	67	4,957.82	80%
121	<b>Region 28</b>						
122	CALIFORNIA DESERT ASSOCIATION OF REALTORS	28	1,033	41%	2,495	53,327.26	41%
123	IMPERIAL VALLEY BOARD OF REALTORS	28	37	18%	206	3,227.24	22%
124	PALM SPRINGS REGIONAL ASSOCIATION OF REALTORS INC	28	191	18%	1,046	16,478.97	15%
125	<b>Region 29</b>						
126	NORTH SAN DIEGO COUNTY ASSOCIATION OF REALTORS	29	1,093	25%	4,401	54,885.23	19%
127	<b>Region 30</b>						
128	PACIFIC SOUTHWEST ASSOCIATION OF REALTORS INC	30	187	9%	1,971	11,321.40	14%

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129	<b>Region 31</b>						
130	LOMPOC VALLEY ASSOCIATION OF REALTORS	31	26	33%	80	2,858.00	42%
131	PISMO COAST ASSOCIATION OF REALTORS INC	31	85	15%	580	11,245.98	14%
132	SAN LUIS OBISPO ASSOCIATION OF REALTORS INC	31	53	16%	324	7,581.00	19%
133	SANTA MARIA ASSOCIATION OF REALTORS	31	44	12%	357	7,238.00	17%
134	SCENIC COAST ASSOCIATION OF REALTORS INC	31	60	17%	358	8,615.99	14%
135	<b>Region 32</b>						
136	LAGUNA BOARD OF REALTORS	32	191	31%	622	13,374.00	23%
137	NEWPORT BEACH ASSOCIATION OF REALTORS INC	32	172	13%	1,335	9,488.00	14%
138	ORANGE COUNTY ASSOCIATION OF REALTORS	32	1,860	15%	12,185	95,139.92	16%
139	California Association of REALTORS		12	12%	97	1,944.93	20%
140	<b>TOTAL</b>		<b>33,791</b>	<b>19%</b>	<b>176,454</b>	<b>2,441,803.85</b>	