



# **IMPAC Policies and Procedures 2009**



CALIFORNIA ASSOCIATION OF REALTORS®

# Welcome and Overview

Welcome to the Issues Mobilization Political Action Committee (IMPAC) of the California Association of REALTORS®. As an IMPAC Trustee or IMPAC Alternate, you hold a very important position within organized real estate.

This document, “IMPAC Policies and Procedures 2009,” is a “How To” reference guide that will assist you during your service as a Trustee or Alternate. It explains the origins of IMPAC funds, and the various guidelines and procedures employed by the Trustees.

Please familiarize yourself with this information, the Mission Statement below and the IMPAC Bylaws at the end of this document. Together, these items will help you be a successful IMPAC Trustee or Alternate.

## **IMPAC Mission Statement**

The mission of the Trustees is to advance the Association’s mission and legislative objectives by managing and administering funds to support advocacy, legislative and public educational efforts at the federal, state and local levels that have an impact on real property in California. IMPAC is a policy review and work committee. The Trustees report to the Executive Committee and Board of Directors for information only, and are authorized to make funding decisions without Director approval. (July 1994)

**To Get IMPAC Information,  
Guidelines and Forms On the Web**

***Go To:***

***<http://www.car.org>***

**Then Go To:**

**Governmental Affairs and then  
State and Local IMPAC**

# Table of Contents

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<b>1. IMPAC - What Is It? How Is It Funded?</b> .....	4-8
A. IAF and PAF	
B. Local IMPAC	
C. State IMPAC	
<b>2. Guidelines &amp; Procedures</b> .....	9-13
A. Guidelines for Expenditures	
B. Request Approval Process	
C. State IMPAC Request Evaluation Criteria	
<b>3. Programs</b> .....	14-18
A. Interboard Solicitation	
B. BORPAC/IMPAC Exchange/Loans	
<b>4. Forms</b> .....	19-32
A. Local IMPAC Funding Request	
B. State IMPAC Program Funding Request	
C. State IMPAC Campaign Funding Request	
D. Interboard Solicitation	
<b>5. IMPAC Trustees, Selection Process, Bylaws and Procedures</b> .....	33-45
A. Roster (2009)	
B. IMPAC Trustee Selection Process	
C. Bylaws (updated June 2005)	
D. Summary of Policies Adopted by the IMPAC Trustees	
E. Who to Contact at C.A.R.	

# 1. IMPAC – What is It? How Is It Funded?

- ◆ IAF and PAF
- ◆ Local IMPAC
- ◆ State IMPAC



# Issue Action Fund (IAF) and Political Activities Fund (PAF)

## How are State and Local IMPAC Funded?

Funding for C.A.R.'s Issues Mobilization Political Action Committee (IMPAC) comes primarily from a \$10.00 set aside from the members' dues, which is deposited in the Issue Action Fund (IAF).

The IAF first pays for:

- Administrative Costs of CREPAC/Candidate PACs
- Administrative Costs of IMPAC

After these administrative costs, the remainder is allocated as follows:

- State IMPAC Account (70%)
- Local IMPAC Accounts (30%)
- In addition, State and Local IMPAC historically received a small percentage of Political Survival funds raised by local Associations (State: 5% and Local:10%). Beginning in 2001, these funds no longer come directly from Political Survival, but are allocated from the Political Activities Fund (PAF), from C.A.R. dues (for tax purposes). Amounts distributed to State and Local IMPAC Funds were not changed, and Local IMPAC funds continue to be distributed to local Association accounts based on their Political Survival contribution rates.

## How does a local Association know the balance of its Local IMPAC Account?

Local Association balances are available on the web at [www.car.org](http://www.car.org) (see page 2). Click on "PAC Board Balances." Users must have a log-in identification number and a password.

Local Associations may also contact Allan Atienza in C.A.R.'s Accounting Department at (213) 739-8254 or email [allana@car.org](mailto:allana@car.org) for balances.

# Local IMPAC

## ***What is Local IMPAC?***

Local IMPAC is an issues political action fund maintained by C.A.R. for a local Association.

## ***Where does the money come from?***

Local IMPAC funds are a combination of a C.A.R. contribution from the Issue Action Fund portion of C.A.R. dues, and an allocation from the Political Activities Fund in an amount equal to 10% of a local Association's Political Survival Contribution rate.

## ***What can IMPAC funds pay for?***

Local IMPAC funds **CAN** be used for a wide variety of issue advocacy purposes:

- Ballot Measure Campaigns - REALTOR® Issue Mobilization Campaigns
- Dues and Contributions to Coalitions - Receptions/Events/Conferences
- Advocacy and Policy Education
- Policy Research and Consulting Services
- Travel, Meals and Receptions Associated with Lobbying an Issue

Local IMPAC **CANNOT** be used:

- to benefit candidates for office
- for activities which impose a lobbyist registration burden on C.A.R.
- for routine business expenses of a local Association.

## ***Why are requests submitted to C.A.R.?***

Political expenditures are heavily regulated by local, state and federal laws which expose violators to severe civil and criminal penalties. C.A.R. manages the political accounts to assure that all expenditures comply with legal restrictions and are properly reported according to law.

## ***How are requests submitted?***

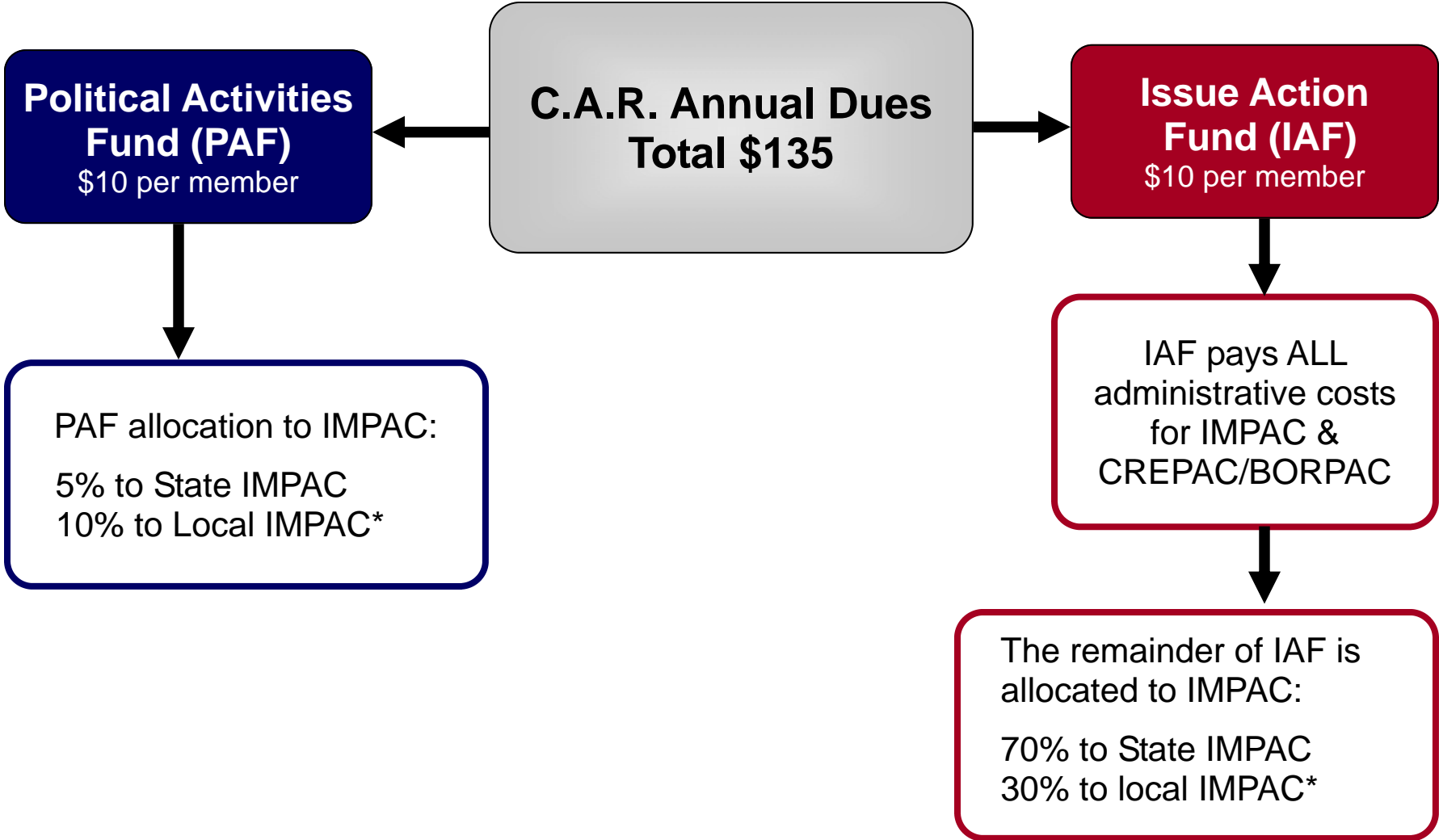
Requests for reimbursement of a Local IMPAC expenditure and requests for preparation of a check drawn from a Local IMPAC account are submitted on the simple, one page Local IMPAC Request Form available at [www.car.org](http://www.car.org) (see page 2). The first page of the form asks for the details of the request and provides information for submittal of completed forms. The second page of the form lists appropriate IMPAC expenditures and details the information required when IMPAC funds are used for gifts or entertainment of public officials.

## ***Why might a local IMPAC request be rejected?***

Local IMPAC requests can be rejected for three reasons:

1. The funding request does not meet IMPAC guidelines.
2. The request is submitted too late to meet state reporting timelines.
3. The request violates local, state or federal law.

# Issues Mobilization Political Action Committees



\* NOTE: IMPAC funds are allocated based on 15% of an Association's REALTOR® Action Fund (RAF) contribution rate.

# State IMPAC

## ***What is State IMPAC?***

State IMPAC is an issues political action fund maintained by C.A.R.

## ***Where does the money come from?***

State IMPAC is funded by the Issue Action Fund portion of C.A.R. dues, and a small percentage from the Political Activities Fund, also from dues.

## ***What is the Issue Action Fund?***

The Issue Action Fund (IAF) is financed by \$10 of every REALTOR'S® C.A.R. dues. (See page 5 for discussion of the IAF and PAF, and page 8 for the IMPAC Funds Flow Chart).

## ***What can IMPAC funds pay for?***

State IMPAC funds are used to advance the REALTOR® public policy agenda on a statewide level in the same way Local IMPAC funds are used locally. State IMPAC pays for:

- Ballot Measure Campaigns - REALTOR® Issue Mobilization Campaigns
- Dues and Contributions to Coalitions - Receptions/Events/Conferences
- Advocacy and Policy Education
- Policy Research and Consulting Services

State IMPAC **CANNOT** be used to benefit candidates for office.

## ***Can Local Associations apply for State IMPAC funds?***

Yes. Local associations who face an issue campaign or project which is beyond the financial means of the Local IMPAC or which is of statewide significance to REALTORS® can apply for State IMPAC funds.

## ***How are requests submitted?***

Applicants for State IMPAC funding must submit their request on one of two forms: the State IMPAC Campaign Funding Request Form, for contributions to state or local ballot measure campaigns or the State IMPAC Program Funding Request Form, for contributions to advocacy, education, coalitions, etc. Both forms are available at [www.car.org](http://www.car.org) (see page 2).

## 2. Guidelines & Procedures

- ◆ **Guidelines For Expenditures**
- ◆ **Request Approval Process**
- ◆ **State IMPAC Request Evaluation Criteria**



# Guidelines for Appropriate IMPAC Expenditures

## 1. Ballot Measure Campaigns

- A. state
- B. local - including recall elections

## 2. Grass-roots Lobbying Activities

- A. mailgrams or letter writing campaigns
- B. travel associated with lobbying (e.g., Legislative Day trip to Sacramento or Washington D.C.)
- C. costs associated with taking a public official to lunch
- D. advertisements

## 3. Receptions or Events That Are Legislative in Nature

- A. "Meet Your Elected Officials Night" (But not a "Meet the Candidates Night")
- B. Educational forums for the community

## 4. Membership In/or Contributions to Other Grass-roots Lobbying Organizations

- A. county council of real estate Boards, regional issue-oriented REALTOR® coalitions
- B. nonpartisan community-based organizations such as the chamber of commerce, taxpayers association, building industry association, apartment association, etc.
- C. state or national organizations that are issue-oriented and non-partisan such as the Pacific Legal Foundation, California Taxpayers Association, Civil Justice Association of California, the Reason Foundation.

## 5. Legislative Advocacy

- A. expenses associated with a contract between a professional legislative advocate and an Association of REALTORS® or county council.
- B. IMPAC funds cannot be used for any activity which would require lobbying reporting or registration under the Political Reform Act.

## 6. Educational Programs Related to Issues or Advocacy Techniques

- A. subscriptions to newsletters, periodicals or journals that are a source of issues information
- B. purchase of videotapes or related training material
- C. conference registration fees

## 7. Data-collection to Assist a Board with the Development of a Lobbying Strategy

- public opinion surveys

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**Note:** The operating principle in determining appropriate IMPAC expenditures is the following:  
*IMPAC funds cannot be used for activities that either directly or indirectly endorse a candidate for public office. Such an expenditure would jeopardize the tax-exempt status of IMPAC.*

# Local IMPAC Request Process

## Step One

### Complete the Local IMPAC Funding Request Form

The form must be completely and legibly filled out, and all supporting documents (Minutes, Data on Gifts to Public Officials, Receipts, List of Subvendors, etc.) must be attached.

## Step Two

### E-mail or Mail the Request Form to C.A.R.

E-mail to: richardl@car.org  
Mail to: Local IMPAC c/o C.A.R.  
525 S. Virgil Avenue  
Los Angeles, CA 90020

## Step Three

### Administrative and Legal Review

IMPAC staff and IMPAC's legal consultant review the request and supporting materials to assure compliance with IMPAC guidelines and local, state, and federal requirements. Requests which do not comply with IMPAC guidelines, deadlines or the law will not be funded. Review process takes approximately one week.

## Step Four

### Check Preparation

Upon receipt of IMPAC and legal approval of the request, IMPAC accounting staff prepare and mail a check to the Association or the designated check recipient. Check preparation takes approximately one week.

## Expediting

### A Local IMPAC Funding Request

If you need expedited handling of an IMPAC Funding Request just contact Rick Laezman at 213-739-8273 or e-mail richardl@car.org

## Answers

### To Your Questions

For information regarding Local IMPAC guidelines and procedures contact:  
Rick Laezman 213-739-8273 or richardl@car.org

For information regarding Local IMPAC account balances or check status contact:  
Allan Atienza 213-739-8254 or allana@car.org

# State IMPAC Request Process

## Step One

### Completing the State IMPAC Funding Request Form

There are two State IMPAC Request forms. The CAMPAIGN REQUEST FORM is for requests for contributions to ballot measure campaigns. The PROGRAM REQUEST FORM is for requests for contributions to any other issue activity. The form must be completely and legibly filled out, signed by the Board President and all supporting documents must be attached.

## Step Two

### E-mail or Mail the Request Form to C.A.R.

E-mail to: [elizabethg@car.org](mailto:elizabethg@car.org)  
Mail to: State IMPAC c/o C.A.R.  
980 9th Street, Suite 1430  
Sacramento, CA 95814

State IMPAC Requests must be received at least three weeks before a scheduled meeting of the IMPAC Trustees to be considered for funding.

## Step Three

### Staff Analysis and Trustee Approval

IMPAC staff, and an IMPAC Trustee assigned to the particular request, review the request and supporting materials to assure compliance with IMPAC guidelines and local, state, and federal requirements. Both staff and the Trustee may call the applicant to gather additional information. The staff and Trustee analysis of the request is submitted to the Trustees for their consideration. All State IMPAC Requests are submitted to the IMPAC Trustees for approval, and applicants are expected to make a presentation to the Trustees.

## Step Four

### Check Preparation

Upon IMPAC Trustee approval of the request, IMPAC accounting staff prepare and mail a check to the designated check recipient. Check preparation takes approximately one week.

## Expediting

### A State IMPAC Funding Request

If you need expedited handling of a State IMPAC Funding Request just contact Elizabeth Gavric at 916-492-5200 or e-mail [elizabethg@car.org](mailto:elizabethg@car.org).

## Answers

### To Your Questions

For information regarding State IMPAC guidelines, procedures and check status contact: Elizabeth Gavric at 916-492-5200 or [elizabethg@car.org](mailto:elizabethg@car.org)

# State IMPAC Request Evaluation Criteria

The IMPAC Trustees evaluate all state IMPAC Requests on the following criteria.

**A. *Statewide Significance:***

Defined as the appropriateness of the request when evaluated against the mission of IMPAC, which, according to the bylaws is to support "campaigns or issues that may have statewide significance."

**B. *REALTOR® Commitment to Campaign or Activity:***

Defined as the extent to which local REALTORS® have demonstrated a commitment (either through financial support or volunteer efforts) to the desired objective.

**C. *Sound Fundraising and Budgeting Strategy:***

Defined as the reasonableness of the campaign budget (especially overhead) as measured against the IMPAC campaign database; the appropriate proportion of REALTOR® financial support; the commitment of local Association IMPAC funds; and the diversity of funding sources already tapped or pledged.

**D. *Prognosis:***

Defined as the likelihood that the campaign or activity will be successful/effective.

**E. *C.A.R.'s Political Considerations:***

Defined as the relative importance of a campaign or project when weighed against C.A.R.'s political alliances, legislative agenda and historical relationships.

**F. *Integrity of IMPAC Procedures:***

Defined as the respect displayed by the campaign consultant or requesting organization for IMPAC's procedures, rules and deadlines.

**G. *Proactivity:***

Defined as the extent to which the project under consideration represents a proactive "investment" of IMPAC funds to prevent a battle at the ballot box, to promote a more favorable climate for affordable housing, or to meet other objectives as laid out in the IMPAC bylaws and by the IMPAC Trustees.

# 3. Programs

- ◆ **Interboard Solicitations**
- ◆ **BORPAC/IMPAC Exchange/Loans**



# Interboard Solicitations

**Q: *When is it appropriate to conduct an interboard solicitation?***

**A:** Interboard solicitations represent an alternative method of fundraising for local Associations/Boards. First and foremost, local Associations have access to their local IMPAC account to meet local needs. In addition, State IMPAC represents a resource to which local Associations can turn for assistance on issues or activities of statewide significance. However, in certain instances, such as issues of regional concern, it may be appropriate for a local Association to conduct an interboard solicitation. It should be noted, however, that interboard solicitations also represent the least efficient and cost effective way to raise money.

The State IMPAC Trustees have found it necessary to develop guidelines governing interboard solicitations as a result of confusion surrounding this procedure. For example, in 1986, when there were no such guidelines, local Associations received 13 separate solicitation letters that year to support a wide range of campaigns and activities--some that had already received State IMPAC monies and one that was never presented to the State IMPAC Trustees. In light of these events and other instances involving a proliferation of interboard solicitations, the local Associations have asked C.A.R. to provide clarification to curb an escalating fundraising spree.

**Q: *My Local Association wants to conduct an interboard solicitation. What do we do?***

**A:** Contact C.A.R. staff at (916) 492-5200. You will be directed to the appropriate forms and guidelines. In addition, staff will notify the IMPAC Chairman and Trustees of your Association's intention to conduct an interboard solicitation. When feasible, the request will be reviewed by the state IMPAC Trustees. The Trustees may even provide funding for your request, thus eliminating the need for an interboard solicitation. In cases where time will not allow review by a quorum of the Trustees, the IMPAC Chairman will review the request.

After review by the IMPAC Chairman and/or Trustees, the interboard solicitation form will indicate one of the following actions:

1. That the interboard solicitation has been endorsed by the State IMPAC Trustees; or
2. That the interboard solicitation has not yet been reviewed by the State IMPAC Trustees; or
3. That the State IMPAC Trustees specifically did not approve the interboard solicitation.

After review by the Chairman and/or Trustees, the authorized form will be returned to the local Association. The solicitation should include a copy of the authorized interboard solicitation form, a local IMPAC Funding Request Form, and any other relevant material (e.g., summary of proposed measure, newspaper clippings, description of program, etc.)

**Please note that in instances where an interboard solicitation is conducted without the knowledge or review of the IMPAC Chairman or Trustees, no funding requests will be processed by C.A.R. staff.**

**Q: *Is my Association limited in the number of Associations that can be solicited for funding?***

**A:** It is the intent of the IMPAC Trustees to not discourage interboard solicitations within a **city, county or region**. However, because of concerns raised by local Associations who have received a large number of interboard solicitations from other Associations and organizations throughout the state, the Trustees encourage each local Association to exercise good judgment before embarking on a **statewide** interboard solicitation.

**Q: *My Association has received an interboard solicitation from an Association that is not in my region. Should we fund the request?***

**A:** From time to time, local Associations contact C.A.R. staff for assistance in evaluating interboard solicitations received from other Associations. As always, it is up to your own local IMPAC Trustees to determine, in light of potential demands on your Local IMPAC funds, whether your Association has sufficient revenues to fund the request.

**Q: *Is there a limit to the amount of funds that can be raised through an interboard solicitation?***

**A:** Although there is no set limit on the amount of funds that Associations are allowed to raise through an interboard solicitation, each Association must indicate on the interboard solicitation form the following information:

- The amount being solicited
- The total campaign budget
- The amount requested/received from state IMPAC (if applicable)
- The amount anticipated to be raised through the interboard solicitation (i.e., fundraising goal)
- The amount contributed from the Association's own local IMPAC account
- The election date or cut-off date upon which the solicitation will end

Please note that C.A.R. staff will not process local check requests received after the fundraising goal is met or 30 days after the election/cut-off date (whichever comes first.) In such cases, the check request will be returned to the granting Association.

**Q: *Who should my local Association contact with questions about the interboard solicitation process?***

**A:** C.A.R. State IMPAC staff at (916) 492-5200 or [elizabethg@car.org](mailto:elizabethg@car.org)

# The BORPAC/IMPAC Exchange Program

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Are you facing a series of tough local elections--the likes of which promise to use all of your BORPAC funds? Could your Local IMPAC benefit from an infusion of funds? Have you ever wished you could find a way to tap the surplus in one of your PACs in order to strengthen the other?

The **BORPAC/IMPAC Exchange Program** may be the answer. The BORPAC/IMPAC Exchange Program allows you to exchange, dollar-for-dollar, one type of local PAC funds for another (available to all local Associations who participate in the C.A.R. PAC structure).

## ***How does the program work?***

If, for example, your Association is facing some tough city council elections in the coming year, and would like to be well positioned to make a difference by substantially supporting several key candidates, it may need more BORPAC resources than you currently have in your account. Of course, one option that always exists is to sponsor a BORPAC fundraiser in order to shore up the BORPAC account. You also have another option. Under the BORPAC/IMPAC Exchange Program you may exchange a certain portion of your IMPAC funds, for example, for a like amount of BORPAC funds from another local Association.

Some Associations, on the other hand, may find a surplus in their BORPAC accounts (especially if they are located in cities with strict limits on campaign contributions) but are in desperate need of additional IMPAC funds because of anticipated growth control, rent control, or other issues. They, too, may exchange some of these surplus BORPAC funds to benefit their local IMPAC.

## ***If our Association wants to exchange, what is the process?***

C.A.R. maintains a registry of Associations willing to exchange local IMPAC and BORPAC funds. To place your Association on this registry you need to do the following:

- (1) Gain approval for the exchange from the appropriate decision-making bodies. Since both IMPAC and BORPAC funds are affected in this process, your BORPAC Trustees, your IMPAC Trustees (if you have them) and your Board of Directors must approve the exchange.
- (2) Send a cover letter by mail or e-mail to C.A.R., addressed to "IMPAC Accounting," that announces your request to be placed on the registry, and stipulates the amount and type of funds you wish to exchange.
- (3) Attach to the letter those copies of the minutes of the BORPAC Trustees, the IMPAC Trustees (if appropriate) and the Board of Directors, which authorized the exchange.
- (4) Attach the appropriate funding request form (i.e., local IMPAC or BORPAC) that will release the dollars you wish to exchange.

Once your request arrives at C.A.R., it will be placed on the registry. All exchanges will be facilitated by C.A.R. and accommodated on a first-come-first-serve basis. The speed with which your exchange can be accommodated will depend upon whether there is an available Association on the registry that is willing to exchange for the funds you need. Therefore, it is recommended that local Associations act well in advance of elections to maximize their opportunity to exchange funds.

### ***What happens if you need the funds, and there are no Associations on the registry willing to exchange?***

The Trustees recognized that there may be instances when the registry would not be able to meet the needs of local Associations who were in need of an infusion of local PAC funds. To this end, the Trustees will authorize the approval of loans of local BORPAC or IMPAC funds from one Association to another. Such loans represent a privately negotiated agreement between two local Associations and C.A.R.'s role will be limited to facilitation. To ensure that a local Association does not overextend itself by taking advantage of this policy, loans are authorized subject to the following caveat: **An Association's outstanding debt may not exceed 100% of the funds raised for its local PAC during the previous year's Political Survival drive.**

C.A.R.'s role in facilitating loans will be limited to actively monitoring loans to ensure that the 100% loan limit is not exceeded. C.A.R. cannot advise local Associations on the terms of their loan agreements, or monitor repayment. C.A.R. will merely process the necessary documentation that authorizes the loan. This documentation will include the following:

#### ***Lending Association:***

- (1) Minutes from the Board of Directors meeting that authorizes the loan.
- (2) Appropriate form (e.g., BORPAC or IMPAC) which authorizes release of funds made payable to "ABC Association of REALTORS® PAC"

#### ***Borrowing Association:***

- (1) Minutes from the Board of Directors meeting that authorizes the loan arrangement.
- (2) Acknowledgement that the Association recognizes it cannot exceed its 100% debt limit.

Any questions you might have about the exchange program--procedures, policies, strategies--should be directed to either Elizabeth Gavric (916) 492-5200, or Rick Laezman (213) 739-8273, or Allan Atienza (213) 739-8254. This program should meet the special needs of many local Associations who face unique situations in the area of candidate elections or issue advocacy.

# 4. Forms

- ◆ **Local IMPAC Funding Request**
- ◆ **State IMPAC Program Funding Request**
- ◆ **State IMPAC Campaign Funding Request**
- ◆ **Interboard Solicitation**





# Local IMPAC Funding Request Form

Date:

## Funds Requested By:

Applicant/REALTOR® Association:

Association No.

Address:

City/Zip:

Telephone: (     )

Fax: (     )

Web Site Address:

Email Address:

Signature/Name (Association/Board President):

## Purpose of Funding (brief description):

## Amount Requested: \$

**DIRECTIONS:** If the request is for a local or state issues campaign, please complete Section I. If it is not related to a campaign, please complete Section II. Also note the Local IMPAC Expenditure Guidelines and required supporting documents (next page).

### I. Campaign:

Recipient of Check/Campaign Committee Name:

Treasurer/Financial Officer:

Address (Street/PO Box):

City/State/Zip:

Campaign ID#:

Date of Election:

Measure Name, Number or Letter:

Position:

Support

Oppose

Location of Election:

### II. Non-Campaign:

Recipient of Check/Vendor:

Treasurer/Financial Officer:

Address (Street/PO Box):

City/State/Zip:

Taxpayer ID#:

Mail Check To (Name/Address):

**Submit Request:** Fax to: (213) 739-7273, or email to: [richardl@car.org](mailto:richardl@car.org), or mail to: Local IMPAC c/o C.A.R. 525 S. Virgil Ave., Los Angeles, CA 90020

## Local IMPAC Expenditure Guidelines

**INCOMPLETE FORMS CANNOT BE PROCESSED.** To avoid delays in processing requests, please be sure the request form is complete, and submit **supporting documents** as follows:

- \* Local Association Minutes Indicating Amount Requested and Recipient
- \* Receipts for Reimbursement and/or Vendor Invoices
- \* Association/Board President's Signature/Name
- \* Brochures/Fliers or Other Supporting Documents
- \* Copy of Draft Language (for Radio, Print, or Direct Mail Ads)

**IMPAC funds CANNOT be used for activities that directly or indirectly support or oppose a candidate for public office.** However, IMPAC funds may be used to advance the issue-oriented policy interests of REALTORS® as follows:

- \* Ballot Measure Campaigns
- \* REALTOR® Issue Mobilization Campaigns
- \* Dues and Contributions to Coalitions
- \* Receptions/Events/Conferences
- \* Professional or Volunteer Advocacy
- \* Advocacy and/or Policy Education
- \* Policy Research and Consulting Services
- \* Travel Expenses for Non-CAR Directors to Attend CAR Legislative Day

For more detailed information or questions on IMPAC guidelines and procedures, visit the C.A.R. Political Affairs page at <http://www.car.org/governmentalaffairs/impac/> or call (213) 739-8273.

### **GIFTS TO PUBLIC OFFICIALS:**

If all or a portion of the PURPOSE OF FUNDING is to pay for a gift to a state elected or appointed government official (including a gift of food and beverage), the following information must be attached and the request for reimbursement must be submitted to IMPAC within 21 days of the gift.

- \* Date of gift
- \* Name of reportable person(s)
- \* Position/Title
- \* Amount of gift
- \* Total activity (e.g., 10 people at dinner at a cost of \$100)
- \* Location of event or address of vendor (flower shop, restaurant, hotel, etc.)
- \* Number of reportable attendees.
- \* Number of total attendees.
- \* If Check Recipient will pay sub-vendors, the list of sub-vendors must be attached.

If you require immediate delivery, please provide your FedEx #:

**NOTE: Due to state and federal reporting requirements, IMPAC cannot process requests submitted more than 60 days after the activity.**



# State IMPAC Program Funding Request Form

Date:

## Funds Requested By:

Applicant/REALTOR® Association:

Address:

City/Zip:

Telephone: (    )

Fax: (    )

Name of Executive Officer:

Email Address:

Contact Person (if different):

Email Address:

Web Site Address:

## Purpose of Funding:

## Recipient of Check:

Treasurer/Financial Officer:

Address (Street/P.O. Box):

Federal Tax ID #:

Brief Program Description:

Amount Requested: \$

## Authorized By:

**REALTOR® Associations please attach a copy of Association minutes which authorized this request for funds.**

To avoid delays in processing requests, please be sure the above information is complete and accurate.  
INCOMPLETE FORMS WILL BE RETURNED FOR FURTHER INFORMATION.

**IMPORTANT:** All requests for State IMPAC funds must be received no later than three weeks prior to a meeting for consideration. Appointments can be made to make a presentation on behalf of a request by calling the IMPAC coordinator at (916) 492-5200.

**E-Mail completed form to:** [elizabethg@car.org](mailto:elizabethg@car.org)

**For more information call:** (916) 492-5200



6. What are appropriate measures of success of the program? For existing programs, please provide evidence of achievements.

7. Do other programs provide the same or similar service? How does this program differ?

### **Program Budget**

1. What is the budget for this program?

If program has an indefinite term, what is the annual budget?

2. What percentage of the total program budget would be comprised of the IMPAC funds requested?

3. Has the program received IMPAC funds in the past? Please provide year(s) and amount(s):

4. How will IMPAC funds be used among the following categories?

<b>Category</b>	<b>Amount</b>	<b>Percentage</b>
Admin/Overhead		
Direct Services		
Fundraising		
TOTAL		

### **Fundraising Strategy**

1. Please indicate specific sources/groups and amounts of revenue already raised for this program.

<b>Sources/Groups</b>	<b>Amounts</b>
-----------------------	----------------

2. What sources/groups are targeted for additional funds and at what amounts?

**Sources/Groups**

**Amounts**

3. What fundraising techniques will be employed?

4. What role will consultants play in fundraising?

(A) Will a percentage of the funds raised accrue to such firms?    Yes            No  
If yes, what percentage?    %

5. What is your timeframe for fundraising and what is the timeframe for the program?

6. Have you successfully raised funds in the past for similar programs? Please explain:

***I promise to send a follow-up report to the IMPAC Trustees within 30 days after the contribution.***

**Name/Signature:**



# State IMPAC Campaign Funding Request Form

Date:

## Funds Requested By:

Applicant/REALTOR® Association:

Address:

City/Zip:

Telephone: (    )

Fax: (    )

Name of Executive Officer:

Email Address:

Contact Person (if different):

Email Address:

Web Site Address:

## Purpose of Funding:

## Recipient of Check:

Treasurer/Financial Officer:

Address (Street/P.O. Box):

Campaign ID #:

Measure Name, Number or Letter:

Position: Supporting      Opposing

Amount Requested: \$

Date of Election:

## Authorized By:

**REALTOR® Associations please attach a copy of Association minutes which authorized this request for funds.**

To avoid delays in processing requests, please be sure the above information is complete and accurate. INCOMPLETE FORMS WILL BE RETURNED FOR FURTHER INFORMATION.

**IMPORTANT:** All requests for State IMPAC funds must be received no later than three weeks prior to a meeting for consideration. Appointments can be made to make a presentation on behalf of a request by calling the IMPAC Coordinator at (916) 492-5200.

*E-Mail completed form to:* [elizabethg@car.org](mailto:elizabethg@car.org)

For more information call: (916) 492-5200

**Campaign/Issue Description.** *Please attach additional materials as necessary.*

1. Please describe, completely and concisely, the purpose of the campaign and the details of the measure being supported or opposed.

2. Briefly describe the events leading up to the placement of this measure on the ballot.

3. What is the significance of the issue to REALTORS®? Is there a statewide impact?

4. Does this issue cross local jurisdictions? If yes, please describe the extent of mutual efforts with other impacted associations/groups.

5. For local Associations of REALTORS®, has your Association considered or pursued raising funds by other available means such as; 1) C.A.R.'s IMPAC/BORPAC Exchange Program; 2) Interboard Solicitation; 3) N.A.R.'s Issues Mobilization Committee; or 4) Holding a local fundraiser?

## Campaign Information

Campaign Firm:  
Address:

Contact Person:

Phone: ( )

Fax: ( )

Email:

Website Address:

### A. Campaign Budget

1. What is the proposed budget for this campaign? \$  
Specifically, how will the funds be distributed among the following categories?

#### Category

#### Amount/Percentage

Printing (e.g., brochures, slates, signs, etc.):

Public Opinion Polls:

Direct Mail:

#### Advertising

Newspaper:

Radio:

Television:

Electronic Media:

Other:

**Field Operations** (phone banks, absentee ballot, etc.):

#### Overhead

Campaign Firm Fee:\$

Campaign Staff:

**Other:**

**TOTAL** (Should equal total cost of campaign):

2. What percentage of the total campaign budget would be comprised of the IMPAC funds requested?

### B. Fundraising Strategy

1. Please indicate specific sources/groups and amounts of revenue already raised for this campaign.

**Sources/Groups**

**Amounts**

2. What sources/groups are targeted for additional funds and at what amounts?

**Sources/Groups**

**Amounts**

3. What fundraising techniques will be employed?

4. What role will campaign consultants play in fundraising?

A. Will a percentage of the funds raised accrue to the campaign firm? Yes No  
B. If yes, what percentage %

5. What is the timeframe for fundraising?

### **C. Overall Campaign Strategy**

1. What is the general strategy of the campaign?:

2. Does the campaign intend to utilize public opinion polls? Yes No

3. If yes, and if any surveys have been taken already, please include a summary and the name of the polling firm.

4. Which group of voters will the campaign be targeting and how will they be reached?

5. How organized is the opposition? How well funded? What do you anticipate from them in the way of strategy and tactics?

6. What is the current or likely extent of coalition building on this issue?

7. List the groups and organizations who have taken positions either in support of or in opposition to the measure:

**Support:**

**Opposition:**

## **D. Prognosis**

1. What is the “winability” of this campaign?
2. What is the single greatest obstacle to your success in this campaign?
3. Under what conditions could this campaign be lost?

## **E. Consultant Qualifications**

1. Please describe similar campaigns in which the firm has been involved in the past:

<b>Campaign</b>	<b>Date</b>	<b>Result</b>
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2. What is the success ratio in these types of campaigns

3. Who else will be directly involved with the campaign in a paid capacity? How much time? What are their qualifications?

***I promise to send a campaign follow-up report to the IMPAC Trustees within 30 days after the election.***

**Name/Signature:**



# Interboard Solicitation Form

**Date:**

**DIRECTIONS:** Local Associations/Boards of REALTORS® must use this form when conducting an interboard solicitation for IMPAC funds. Attach it to a copy of the "Local IMPAC Funding Request Form" which is used to request local IMPAC funds from C.A.R. If you have any questions regarding the use of this form, please contact C.A.R. State IMPAC staff at (916) 492-5200 or elizabethg@car.org.

## State IMPAC Involvement (please check one):

- The State IMPAC Trustees have authorized this interboard solicitation.
- The State IMPAC Trustees are currently reviewing this interboard solicitation.
- The State IMPAC Trustees voted against approval of this interboard solicitation.

## I. Origin of Request

Name of Local Association Requesting Funds:

Address:

City/Zip: Telephone: ( ) Fax: ( )

Web Site Address:

Name & Title of Contact Person: Email Address:

Purpose of Funding:

Date of Election:

Amount Requested:

## II. Recipient of Funds

Check Payable To (Name of Campaign or Entity):

Campaign I.D. # or Taxpayer I.D. #:

Address:

City/State/Zip:

Mail Check To (please check one):

- Recipient at Above Address
- Local Association Requesting Funds

### III. Fundraising Strategy

1. What is the total campaign budget? \$
2. Has State IMPAC been approached for funding? YES:                      NO:
3. Date request submitted to State IMPAC:
4. Amount Requested from State IMPAC: \$
5. Amount Received from State IMPAC: \$
6. Total number of local Associations/Boards to which this solicitation is being sent:
7. Reason(s) for soliciting other Associations/Boards of REALTORS®:
8. What is the fundraising goal for this solicitation? \$
9. How much did the requesting local Association contribute from its IMPAC account? \$
10. What percentage of the requesting local Association's IMPAC fund balance does its contribution represent? \$

### IV. Other

Please provide any additional information that is relevant to this local IMPAC interboard solicitation (i.e., copy of the measure, web site address, background information, brochures, etc.)

**Please Note:** It is the policy of the State IMPAC Trustees that local IMPAC check requests received through an interboard solicitation will be returned to the granting Association/Board if: 1) the fundraising goal has already been met; or, 2) the request is received 30 days after the election.

<p style="text-align: center;">CALIFORNIA ASSOCIATION OF REALTORS® <b>ISSUES MOBILIZATION POLITICAL ACTION COMMITTEE</b> 980 Ninth Street, Ste. 1430, Sacramento, CA 95814-2734 (916) 492-5200</p>
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## **5. IMPAC Trustees, Selection Process, Bylaws & Policies**

- ◆ **Roster 2009**
- ◆ **IMPAC Trustee Selection Process**
- ◆ **Bylaws (Updated 6/05)**
- ◆ **Summary of Policies Adopted by the IMPAC Trustees**
- ◆ **Who To Contact At C.A.R.**



# IMPAC Trustee Selection Process

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The IMPAC Trustees Committee consists of fifteen voting Trustees elected to staggered, three-year terms by C.A.R.'s Board of Directors, fourteen of whom are REALTORS® and one is the Association Executive of a local Association. There are six liaison members serving one-year terms coincident with their IMPAC-related assignment on the Board of Directors, and up to eight Alternates elected to one-year terms by the Board of Directors.

At the beginning of the year, each C.A.R. Region is entitled to submit at least one Nominee to C.A.R. for consideration by the IMPAC Nominating Committee. Any other eligible C.A.R. member or local Association Executive also may submit their names for consideration directly to C.A.R. for consideration by the IMPAC Nominating Committee. In late spring, the IMPAC Nominating Committee, consisting of the IMPAC Chair, C.A.R.'s President, one other IMPAC Trustee and two non-Trustee C.A.R. members, select a slate of nominees for Trustee and Alternate to fill the Committee's vacancies.

After the IMPAC Nominating Committee selects the nominees for Trustee and Alternate, C.A.R.'s Board of Directors is notified of the slate at the summer Directors' meeting. The election of Trustees and Alternates is conducted at the last Directors' meeting of the year.

**BYLAWS  
OF  
THE CALIFORNIA ASSOCIATION OF REALTORS®  
ISSUES MOBILIZATION POLITICAL ACTION COMMITTEE**

**ARTICLE I  
NAME AND ORGANIZATION**

The name of this voluntary political action committee is the California Association of REALTORS® Issues Mobilization Political Action Committee, (hereinafter referred to as the "Committee" or "IMPAC"). It is a voluntary, non-profit unincorporated Committee of individual REALTORS® and others, and is not affiliated with any political party. IMPAC is sponsored by the California Association of REALTORS®, Inc. (hereinafter referred to as "C.A.R.").

**ARTICLE II  
PURPOSE**

The purposes of this Committee are:

(a) To establish a continuing political campaign fund managed and operated in accordance with the terms of these Bylaws and not affiliated with any political party;

(b) To receive those voluntary contributions acceptable to the Trustees interested in promoting the political purposes for which this Committee's funds may be expended hereunder;

(c) To support the legislative policies of C.A.R.;

(d) To support or oppose ballot measures, local, state and federal legislation, governmental policy statements, regulations and resolutions, and litigation resulting from governmental regulations;

(e) To encourage REALTORS® to take a more active role in political and governmental affairs, and to support political education and fundraising as well as to pay for various related expenses.

**ARTICLE III  
PRINCIPAL OFFICE**

The principal office of the Committee shall be located at the address as set forth on its Statement of Organization.

## **ARTICLE IV CONTRIBUTIONS**

Section 1. Contributions. IMPAC is authorized to solicit and accept contributions from any person from whom contributions may be lawfully solicited and accepted. The Trustees may refuse any contribution with or without reason, and the Trustees will set forth in writing to any requesting contributor that the contribution has not been accepted.

Section 2. Allocation. All contributions received will be allocated as follows unless (1) designated otherwise and (2) accepted by the Trustees by special approval or in accordance with the policies set by the Trustees:

2.1 State. Seventy percent (70%) of each dollar received shall become part of a special IMPAC account for use in local or statewide campaigns or for campaigns or issues that may have local or statewide significance.

2.2 Local. Thirty percent (30%) of each dollar received shall become part of a special IMPAC account allocated for use by local IMPAC. Requests for local IMPAC funds will be charged against the requesting local IMPAC's account. The amount of contributions disbursed for local purposes shall be based upon recommendations from local IMPAC Trustees and shall not exceed the balance of the respective local IMPAC's account. The IMPAC Trustees will have full and final authority to accept or reject such recommendations of local IMPACs.

2.3 Other Funds. Contributions to C.A.R. sponsored fundraising programs shall be allocated in accordance with the formula contained on the annual C.A.R. dues statement.

## **ARTICLE V BOARD OF TRUSTEES**

Section 1. Composition. The governing body of the Committee shall be a Board of Trustees, composed of fifteen (15) voting Trustees approved by the C.A.R. Board of Directors and six (6) non-voting advisory Trustees by virtue of their position within C.A.R. (1) Political Affairs Committee Chair, (2) Legislative Committee Chair, (3) Local Government Relations Committee Chair, (4) the RPAC Trustee(s) representing California, (5) a C.A.R. Committee liaison, and (6) the Immediate Past Chairman of IMPAC. One of the voting Trustees shall be an Executive Officer of a Member Board of C.A.R. With the exception of the Executive Officer Trustee, all voting and non-voting Trustees must be REALTOR® or REALTOR-ASSOCIATE® members of C.A.R. Voting and non-voting advisory Trustees must contribute the minimum suggested amount to all designated C.A.R. sponsored fundraising programs each year in which they serve as a Trustee. No voting Trustee shall serve more than two complete three-year (3) terms. A complete term consists of more than twelve (12) months of a three-year (3) term.

Section 2. Powers and Duties. The Board of Trustees shall have supervision and control over the affairs of the Committee and shall establish and carry out all policies and activities of the Committee. The Trustees shall serve without compensation. The Trustees are empowered to set basic policies with respect to expenditures made by the Committee, and to direct disbursements. The Trustees shall determine the procedures for collection and distribution of funds for issues that the Committee shall support and the amount of all expenditures and disbursements by the Committee.

Section 3. Nominating Committee and Nominations.

3.1 Composition of the Nominating Committee. The Nominating Committee of five persons shall be comprised of the current Chairman, who shall also chair the Nominating Committee, the C.A.R. President, one additional Trustee and two C.A.R. REALTOR® or REALTOR-ASSOCIATE® members appointed by the Chairman of IMPAC. All members of the Nominating Committee must be C.A.R. REALTOR® or REALTOR-ASSOCIATE® members who contribute at least the minimum suggested amount to all designated C.A.R. sponsored fundraising programs. No Trustee seeking election as a Trustee shall serve on the Nominating Committee or shall vote to select persons to be on the Nominating Committee. If the Chair is seeking election as a Trustee, then the appointments to the Nominating Committee, including the Nominating Committee Chair, shall be selected by a majority of the remaining voting Trustees not seeking election.

3.2 Nominations. Any C.A.R. member or Member Board Association Executive may submit nominees, including self nomination, for consideration by the Nominating Committee. All nominations must be received at the C.A.R. offices or by the authorized C.A.R. representative no later than the published deadline for submission of nominations and be filed in accordance with established procedures during the specified filing period.

3.3 Selection. The Nominating Committee shall select no more than one REALTOR® or REALTOR-ASSOCIATE® nominee from any region among the names submitted for the office of Trustee to fill each vacancy that will exist at the end of the elective year. The Nominating Committee shall also select up to nine (9) alternates, one of which shall be an Executive Officer, for one-year terms from the remaining nominees. There shall be no more than one (1) REALTOR® or REALTOR-ASSOCIATE® alternate selected from any region. The Executive Officer nominee or alternate may be from the same region as a REALTOR® or REALTOR-ASSOCIATE® nominee or alternate. The nominees' names shall be announced at the regular or special C.A.R. Directors' meeting preceding the meeting at which the election will take place.

3.4 Nomination by Petition. Additional nominees will be placed on the ballot if submitted by the end of the fourth week following the announcement of the nominees by the Nominating Committee and if accompanied by the endorsement of a majority of the C.A.R. Regions and the nominee is otherwise qualified to serve under these Bylaws.

3.5 Election. The C.A.R. Board of Directors shall elect the Trustees from those nominated under sections 3.3 and 3.4 at a regular or special C.A.R. Directors' meeting. The candidates receiving the greatest number of votes will be considered elected. Only those Directors present at the meeting may vote. The C.A.R. Directors shall also approve alternate Trustees to serve in the event of a vacancy which will be filled in accordance with Section 5 of this Article V.

Section 4. Term of Office. The term of office of each voting Trustee will be three (3) years or until his or her successor is elected and is qualified to act. The terms will be staggered so that five (5) vacancies occur every year. The term of office of each non-voting advisory trustee will coincide with the term as chairman of the respective committee or other position. Voting Trustees shall not serve more than two complete three (3) year terms. A complete term consists of more than twelve (12) months of a three (3) year term.

Notwithstanding that set forth in the paragraph above, in the year 2006 only, five (5) Trustees will be elected for three (3) year terms, and one (1) will be elected for a two (2) year term so that subsequent years will each have five open positions for election.

Section 5. Vacancies.

5.1 In the event of a vacancy, the Nominating Committee that had selected the alternates approved by the C.A.R. Board of Directors in the most recent election shall reconvene and select one of the alternates from the list approved by the C.A.R. Board of Directors. The Nominating Committee's recommendation shall automatically fill the vacancy.

5.2 In the event none of the alternates are available or qualified to serve, the Nominating Committee that had recommended the Trustees for the most recent election shall reconvene and present the nominee at the next C.A.R. Board of Directors' meeting. The C.A.R. Board of Directors shall then elect a new Trustee to fill the vacancy by approving the nominee or electing any other person qualified to serve as Trustee.

Section 6. Removal from Office. A Trustee will automatically be removed from office upon temporary suspension or loss of real estate license, loss of C.A.R. REALTOR® or REALTOR-ASSOCIATE® membership, loss of position as an Executive Officer of a C.A.R. Member Board, failure to contribute the minimum suggested amount to all designated C.A.R. sponsored fundraising programs in each calendar year while serving as Trustee, or if any Trustee fails to attend two consecutive meetings without sound and justifiable reasons. A Trustee may also be removed with or without cause by a majority vote of the C.A.R. Directors present and voting at any duly called meeting of the C.A.R. Board of Directors.

Section 7. Meetings. The regular meetings of the Trustees shall be held in conjunction with the meetings of the C.A.R. Directors. A majority of the voting members of the Board of Trustees shall constitute a quorum. Special meetings of

the Board of Trustees may be called by the Chairman or upon the request of four (4) Trustees. A majority vote of those present and voting is required for action by the Trustees. The Trustees may meet through use of conference telephone or similar communication tools, including but not limited to facsimile and electronic mail, or may take action by written ballot without a meeting.

## **ARTICLE VI OFFICERS**

Section 1. General. The officers of the Committee shall be a Chairman, and up to two Vice Chairmen, a Secretary/Treasurer and an Assistant Secretary/Treasurer. Any officer so appointed shall hold office until his successor has been elected and is qualified to act.

Section 2. Chairman and Vice Chairman. The C.A.R. President shall appoint a Chairman and up to two Vice Chairmen from the voting Trustees then in office. Any Chairman so selected must have served as a voting Trustee during the year immediately preceding taking office as Chairman. One of the Vice Chairman so selected must have served as a voting Trustee during one of the two years immediately preceding taking office as Vice Chairman. Any Chairman or Vice Chairman must be a REALTOR® or REALTOR-ASSOCIATE® member of C.A.R. and must also remain a Trustee while in office. If no existing Trustee is available to serve as Chairman or Vice Chairman pursuant to the section, a Chairman or Vice Chairman may be appointed from among any other C.A.R. REALTOR® or REALTOR-ASSOCIATE® voting Trustee. The term of office of Chairman and Vice Chairman shall be one elective year. A Chairman may not serve more than two consecutive elective years as Chairman.

### Section 3. Secretary/Treasurer and Assistant Secretary/Treasurer.

3.1 The Secretary/Treasurer and Assistant Secretary/Treasurer shall be C.A.R. staff\_members designated by the C.A.R. Executive Vice President. The Secretary/Treasurer and Assistant Secretary/Treasurer shall hold office from appointment until designation of a successor. If the office of Secretary/Treasurer becomes vacant, the Assistant Secretary/Treasurer shall immediately become Treasurer.

3.2 The Secretary/Treasurer of the Committee, subject to the control of the Trustees, shall have general supervision, direction and control of the financial accounts and records of the Committee, shall perform all of the duties of the Committee as provided by the applicable laws, shall have power to receive contributions and make expenditures and shall have other powers and duties as may be prescribed by the Trustees or by these Bylaws. The Secretary/Treasurer shall make financial reports to the Trustees, the C.A.R. Executive Committee and the C.A.R. Board of Directors. The Secretary/Treasurer shall be responsible for keeping minutes of the meetings.

3.3 The Secretary/Treasurer will ensure that the Committee is properly organized as a “committee” under the applicable laws, including but not limited to, filing a Statement of Organization, amending its registration as required and filing periodic campaign reports.

3.4 The Secretary/Treasurer is specifically authorized to retain legal counsel, at the expense of the Committee, to assist in campaign law compliance and to defend any suit or claim related thereto against the Committee.

Section 4. Vacancies and Removal from Office. A Chairman or Vice Chairman may be removed from office with or without cause by a majority vote of the C.A.R. Directors present and voting at any duly called meeting of the C.A.R. Board of Directors. A Chairman or Vice Chairman will automatically be removed from office if the person is no longer a Trustee. In the event of a vacancy, a new Chairman or Vice Chairman shall be selected in accordance with Section 2 of this Article VI.

Section 5. Liability. The Committee shall hold harmless and indemnify any of the Trustees or IMPAC officers from any civil liability and/or late penalties rendered against, or owed by, the Secretary/Treasurer or the Committee on account of any action taken on behalf of this Committee, unless the Trustee or officer intentionally violated a statute or was totally neglectful of his or her duties. The mandatory hold-harmless provision shall not extend to any professional treasurer, advisor, accountant or attorney retained by the Committee. Notwithstanding the above, the Trustees may pay such fines or judgments, in its own discretion, regardless of the motivation of the Secretary/Treasurer, officer or Trustee. All obligations of this Committee hereunder are obligations of such Committee only to the extent of said Committee’s assets and not of any officer, director, employee, or any other person or entity associated with said Committee.

## **ARTICLE VII**

### **AUDITS, FISCAL AND ELECTIVE YEAR, DEPOSITS**

Section 1. Audits. The Committee may arrange for an audit of its receipts and expenditures both annually and after dissolution. Such audits shall be made within sixty (60) days after the close of each year and within sixty (60) days after dissolution.

Section 2. Fiscal and Elective Year. The fiscal and elective years of the Committee shall conform with those of C.A.R.

Section 3. Deposits. The funds of the Committee shall be deposited to the credit of the Committee in one or more banks or other depositories or securities

which are insured or guaranteed by the Federal Government, and as permitted by law, as the Board of Trustees may select.

## **ARTICLE VIII**

## AMENDMENTS

Section 1. These Bylaws may be amended upon thirty (30) days notice by a majority vote of the C.A.R. Board of Directors present and voting at any duly called meeting of the C.A.R. Board of Directors.

Section 2. Notwithstanding the above, any amendment of the Bylaws needed to bring this Committee into conformance with any state or federal statute or regulation shall be adopted upon majority vote of the Trustees, at which time it will be effective, subject to submission to the C.A.R. Directors at its next meeting.

## ARTICLE IX DISSOLUTION

Section 1. The Committee shall be dissolved and cease to exist upon a vote of the Trustees and the C.A.R. Board of Directors or upon all funds of the Committee having been spent, and thereupon a termination report having been filed as required by law. Upon the dissolution of the Committee, any surplus funds shall be disposed of by the C.A.R. Board of Directors in accordance with state law.

# Summary of Policies

## Adopted by the IMPAC Trustees

The following represents a summary of motions adopted by the IMPAC Trustees over the past several years:

<b>INITIATIVES</b>	No funds will be forwarded to initiative committees until the initiative under consideration can be identified and analyzed by the Trustees. (12-7-89)
<b>DEADLINES</b>	<p>State IMPAC Request must be submitted three weeks before a meeting of the Trustees unless late submission is approved by the Chair</p> <p>Local IMPAC Requests which fund gifts to public officials must be submitted within 21 days of the event.</p> <p>Local IMPAC Requests must be submitted within 60 days of the event or activity being funded.</p>
<b>DEFICITS</b>	IMPAC's policy is not to fund deficits <u>from state IMPAC funds</u> .
<b>IMPAC/BORPAC EXCHANGES</b>	<p>That C.A.R. create a registry of local Boards willing to exchange BORPAC and IMPAC funds and that those exchanges be facilitated on a first-come first-serve basis.</p> <p>That exchanges between a Board operating within the C.A.R. PAC structure and a Board operating independent of the C.A.R. PAC structure be addressed on a case-by-case basis when the independent PAC is a proportionate contributor to C.A.R.'s state PACs. (Further, if the Board PAC does not proportionately contribute to the C.A.R. PACs, the exchange will not be permitted.) (7-9-87)</p>
<b>LOCAL IMPAC FUNDRAISING</b>	All CREPAC or IMPAC funds raised from events not held in conjunction with, or in lieu of, the annual dues billing, shall be credited to the Board's BORPAC or local IMPAC account. (12-12-86)
<b>INTERBOARD IMPAC SOLICITATION</b>	<p>...it shall be the policy of the IMPAC Trustees that excess funds raised by local Boards through the interboard solicitation process shall be handled as follows:</p> <ul style="list-style-type: none"><li>• That all local IMPAC check requests that arrive at C.A.R. more than 30 days after election day or when the solicitation fundraising goal has been met, whichever comes first, be returned to the local Boards. (7-12-91)</li><li>• The solicitation form now include a cut-off date indicating the date upon which the solicitation will be ended. (7-12-91)</li><li>• Local IMPAC interboard solicitation forms should be reviewed by the IMPAC Trustees or chairman prior to mailing. (7-12-91)</li><li>• That all requests for interboard IMPAC solicitations be presented to the state IMPAC Trustees prior to mailing to the local Boards. Further, in all instances, the interboard solicitation form and accompanying materials must be reviewed by the IMPAC chairman and the form will indicate one of the following actions with respect to the solicitation:</li></ul>

1. That the interboard solicitation has been endorsed by the state IMPAC Trustees;
  2. That the interboard solicitation has not yet been reviewed by the IMPAC Trustees;
  3. That the IMPAC Trustees did not receive a request from the Board to conduct an interboard solicitation; or
  4. That the IMPAC Trustees specifically did not approve the interboard solicitation.
- When an interboard solicitation is conducted without the knowledge or review of the IMPAC chairman or Trustees, no funding requests will be processed by staff. (10-4-91)
  - It is not the intent of the IMPAC Trustees to discourage interboard solicitations within a city, county or region.

**INTERBOARD  
LOANS**

Loans of local PAC funds from one local Board to another be allowed subject to the following conditions:

- That a Board's outstanding debt obligation may not exceed 100% of the amount it raised for its local PAC through Political Survival in the previous year; and
- That C.A.R. receive written approval from both the lending Board and the borrowing Board that the loan is agreeable to both parties;
- That C.A.R. play an active role in monitoring the debt limit of local Boards.

**LOCAL BOARD  
POSITION ON  
STATE INITIATIVES**

Because the IMPAC Trustees recognize that the California Association of REALTORS® encourages the proactive involvement of local Boards in public policy issues affecting their communities, in the absence of a C.A.R. position on a state ballot measure or an initiative petition effort, if a local Board wants to participate with its local IMPAC funds, the Trustees will evaluate these requests on a case-by-case basis with special consideration given to the relevance of the issue to real estate.

**N.A.R. ISSUES  
MOBILIZATION  
COMMITTEE**

"The Issues Mobilization Political Action Committee (IMPAC) of the California Association of REALTORS® is a self-sufficient PAC. The Trustees anticipate that, given current funding levels, IMPAC is able to meet the ongoing advocacy needs of the state Association and local Boards on state and local issues.

"The National Association of REALTORS® Issues Mobilization Committee may represent an option to fund a state or local issue only in extraordinary circumstances (e.g., in the instance of a precedent-setting issue of nationwide significance.)" (7-20-90)

**MAJOR ISSUES  
FUND**

Shall establish a reserve fund for the purpose of setting aside resources on a periodic basis which can be utilized to proactively support the Association's goals and objectives at the state level.

**STATE LOBBYING  
BY LOCAL BOARDS**

IMPAC funds cannot be used for any purpose or activity which would trigger lobbying reporting or registration under the state Political Reform Act.

**GIFTS TO PUBLIC  
OFFICIALS**

If all or a portion of the **Purpose of Funding** is to pay for a gift to a state or local elected or appointed government official (including a gift of food and beverages), the following information must be attached **and the request for reimbursement must be submitted to IMPAC within 21 days of the gift.**

- Date of Gift
- Name of Reportable Person(s)
- Position/Title
- Amount of Gift
- Total Activity (e.g., 10 people at dinner at a cost of \$100)
- Location of Event or Address of Vendor (flower shop, restaurant, hotel, etc.)
- Number of Reportable Attendees
- Number of Total Attendees

# Who to Contact?

## STATE IMPAC

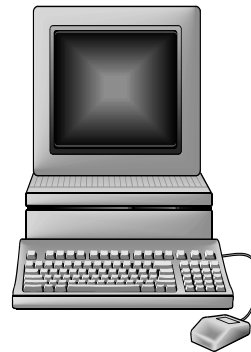
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***Elizabeth Gavric***

Email: [elizabethg@car.org](mailto:elizabethg@car.org)

(916) 492-5200

Fax: (916) 444-2033



Contact for all questions regarding: State IMPAC Guidelines, Procedures and Forms, including Interboard Solicitation Issues

## LOCAL IMPAC

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***Rick Laezman***

(213) 739-8273

Fax: (213) 480-7724

Email: [richardl@car.org](mailto:richardl@car.org)

Contact for all questions regarding: Local IMPAC Guidelines, Procedures and Forms

## ACCOUNTING

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***Allan Atienza***

(213) 739-8254

Fax: (213) 480-7724

Email: [allana@car.org](mailto:allana@car.org)

Contact for all questions regarding: Local Account Balances, Status of State and Local IMPAC Checks, BORPAC/IMPAC Exchange Program

