



# REALTOR® ASSOCIATION 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:** \_\_\_\_\_ (name of organization)

Treasurer/Financial Officer: \_\_\_\_\_

Address (Street/P.O. Box): \_\_\_\_\_

Federal Tax ID #: \_\_\_\_\_

Brief Program Description: \_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_

**Authorized By (to be completed by HAF):** \_\_\_\_\_

**IMPORTANT: REALTOR® Associations must 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. Requests for funds will be received on an ongoing basis throughout the year. The review process will typically take 30 to 45 days from the date on which a request is received. The review process may be delayed if additional information or clarifications are required.

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

**For more information call:** (213) 739-8380



8. Will part or all of H.A.F.'s committed funds be recoverable? Yes \_\_\_\_ No \_\_\_\_\_

If yes, please explain and provide estimate of recoverable funds.

9. Has your association made a contribution to H.A.F.? Yes \_\_\_\_ No \_\_\_\_\_

If yes, what was the amount of the contribution.

## 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 C.A.R.H.A.F. funds requested?

3. Has the program received C.A.R.H.A.F. funds in the past? Please provide year(s) and amount(s):

4. How will C.A.R.H.A.F. 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.

**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 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 C.A.R.H.A.F. Committee within 30 days after the contribution.*

Signature: \_\_\_\_\_, Association President

Signature: \_\_\_\_\_, Association Executive

**C.A.R.H.A.F. Expenditure Guidelines**

The following guidelines indicate the many ways in which C.A.R.H.A.F. funds may be used to advance the housing affordability interests of REALTORS® and REALTOR® organizations.

C.A.R.H.A.F. funds **CANNOT** be used for activities that directly or indirectly support or oppose a candidate for public office.

C.A.R.H.A.F. funds **SHALL NOT** be used to support or oppose the following: 1.) Ballot Measure Campaigns; 2.) REALTOR® Issue Mobilization Campaigns; 3.) Dues and Contributions to Coalitions; 4.) Receptions/Events/Conferences; 5.) Professional or Volunteer Advocacy; 6.) Advocacy and Policy Education; and/or 7.) Policy Research and Consulting Services. These functions are supported by IMPAC funds.

C.A.R.H.A.F. funds must be used for charitable purposes that supports C.A.R.H.A.F.'s mission to play an active role in addressing the ongoing housing affordability crisis facing our state by promoting homeownership and addressing housing affordability issues statewide. The term charitable is used in its generally accepted legal sense and includes, but is not limited to, relief of the poor, the distressed, or the underprivileged; advancement of religion; advancement of education or science; erection or maintenance of public buildings, monuments, or works; lessening the burdens of government; lessening of neighborhood tensions; elimination of prejudice and discrimination; defense of human and civil rights secured by law; and combating community deterioration and juvenile delinquency.

For specific information on C.A.R.H.A.F. guidelines and procedures, contact C.A.R.H.A.F. staff: Monica Rodriguez (213) 739-8380 or email at: monicar@car.org.

**C.A.R.H.A.F. Guiding Principles**

The Committee agreed to base its decisions upon the following guiding principles:

- In general, all programs should require matching funds to leverage C.A.R.H.A.F. funds. This includes grants to local associations. For example, a local association could request funds from C.A.R.H.A.F. for a project, but it should be able to obtain matching funds from other entities such as lenders, government, non-profits or other housing advocates.
- Where possible, funds should be recoverable.
- A REALTOR®'s services should be encouraged in all home purchase transactions. This will require that REALTORS® become familiar with both the C.A.R.H.A.F. and the programs offered by C.A.R.H.A.F. partners.

*Self-Help Project Guidelines:*

At no time will HAF commit more than 50% of the remaining 25% total annual disbursement to Self Help projects (including Habitat for Humanity). Request for funds will not exceed the LESSER of: A) \$50,000, or B) 10% of total existing funds. However, if a Regional approach with a majority of associations develops a large Habitat program, HAF may grant funds up to 10% of total existing funds. In addition, HAF may consider granting a larger sum with consent of the Board of Directors.