


Guidelines For RAF Telephone Solicitation

Thank you for agreeing to solicit investments to the REALTOR® Action Fund on behalf of C.A.R. These Telephone Solicitation Guidelines were created to inform you of C.A.R.'s company policy on placing calls to C.A.R. members; to ensure that your calls comply with federal and state law; and to make each call an effective, pleasant and rewarding experience for both you and the member you are calling. Please review the guidelines and be sure to follow them when placing calls to members.

- 1) **Business Phone Numbers Only.** Calls must be made to the member's **business phone number only**, such as an office number or business cell number. Calls may not be made to a member's home phone number or non-business cell number. If you are unsure whether a phone number is a business number or a home phone/non-business cell number, obtain C.A.R.'s approval prior to calling that number.
- 2) **Call Hours.** Do not call members before the hours of 8 a.m. or after 9 p.m. (local time at the called party's location).
- 3) **Unanswered Calls.** Do not disconnect an unanswered call before at least 15 seconds or 4 rings.
- 4) **Identify Yourself/Purpose of Call.** Give your name, state that you are calling on behalf of C.A.R.'s REALTOR® Action Fund to solicit an investment to the fund, and give the member C.A.R.'s phone number [(916) 492-5200].
- 5) **Courteous, Friendly Call.** When calling members, portray a positive attitude during the call. Be courteous, friendly and respectful at all times. Speak clearly, confidently, with a good volume, tempo and tone. Be a good listener; don't interrupt or speak over a member during the call. Allow the member to hang up first before ending the call. Remember, the member is taking valuable time away from his or her business to listen to you, and your interaction with the member may affect his or her decision to make an investment.
- 6) **Be Knowledgeable.** Be prepared to answer basic questions about the REALTOR® Action Fund, the different investment levels and amounts, and the use of member investments. If you are unsure about any of the answers, don't hesitate to ask. Knowing the answers ahead of time will improve your confidence during the call and may influence the member's decision to make an investment. If you can't answer a member's question, tell the member that you will call the member back with the answer, or if the member desires, he or she may speak with Lindsey Gieck directly at (916) 492-5210.

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- 7) **Threats, Intimidating Language.** Do not use threats, intimidation, or profane or obscene language during a call. Do not make repeated calls in an attempt to annoy abuse or harass the member.
 - 8) **False or Misleading Statements.** Do not make any false or misleading statements about the nature of investments to the REALTOR® Action Fund, including (i) any statement that investments to the REALTOR® Action Fund are required, rather than voluntary (investments to the REALTOR® Action Fund are voluntary and are not required as a condition of C.A.R. membership); (ii) the purpose of soliciting the investment; (iii) the tax-deductible nature of the investment (investments to the REALTOR® Action Fund are **not** tax-deductible); or (iv) how the investment will be used.
 - 9) **No Auto dialers and Prerecorded Messages.** Use of auto dialers and prerecorded messages is strictly prohibited. You may not use auto dialers or prerecorded messages when calling members.
 - 10) **Caller ID.** Do not block caller ID when making a call. You must transmit your name and a telephone number for members to use during regular business hours to make a request not to be called.
 - 11) **Member “Do Not Call” Requests.** If a member makes a request not to be called, provide the member’s name and phone number to Lindsey Gieck **immediately** at (916) 492-5210. Do not make any further calls to the member.

C.A.R. is committed to providing excellent customer service to our members. You represent C.A.R. each time you call a member, and your interaction with the member will leave a lasting impression and reflect positively or negatively upon C.A.R. Following these guidelines will help to ensure the best calling experience possible for both you and the member. If you have any questions or comments, please don’t hesitate to contact Lindsey Gieck at (916) 492-5210.

RAF Investment Solicitation

Script

Thank you for soliciting investments to the REALTOR® Action Fund on behalf of C.A.R. The following telephone script should be used when soliciting investments from C.A.R. members. The script may be modified with C.A.R.'s prior written approval. If you have any questions, please contact Lindsey Gieck, Political Affairs Coordinator at (916) 492-5210.

1. Opening Greeting:

"May I please speak with _____? Hi _____, my name is _____ and I am calling on behalf of the California Association of REALTORS® REALTOR® Action Fund Committee. Funds raised through the REALTOR® Action Fund are used to support candidates who are sympathetic to REALTOR® issues and who support or oppose issues that impact REALTORS®.

As a REALTOR®, you have a vested interest in the government under which you live and work. C.A.R. supports the people who make policy on matters affecting your business, which is why we need your help! C.A.R.'s REALTOR® Action Fund is asking every C.A.R. member to make an investment of \$197 to help defend your right to do business. C.A.R.'s ability to fight and win key issues affecting your business will be even more effective if you invest today. Can we count on you for \$197?"

2. If The Answer Is Yes:

"Thank you very much for supporting the REALTOR® Action Fund! How would you like to make your investment? We accept investments by check, VISA, MasterCard, American Express, Discover, and online at C.A.R.'s website."

- a. **To Pay By Check:** "Please make your check payable to "C.A.R. Political Action" and mail your check to: California Association of REALTORS®, 980 Ninth Street, Suite 1430, Sacramento, CA 95814."
- b. **To Pay By Credit Card:** collect the member's credit card number and expiration date, and provide the information to Lindsey Gieck at (916) 492-5210.
- c. **To Pay Online:** "You can make your investment online by going to C.A.R.'s website at www.car.org, then click on 'Governmental Affairs,' then click on REALTOR® Action Fund. Or, if you like, we can send you an investment form by mail or fax, and you can mail or fax the form in." [If the member wants an investment form by fax or mail, obtain the member's fax or mailing address and provide it to Lindsey Gieck at (916) 492-5210.]
- d. **Closing "Thank You":** "Thank you again for supporting C.A.R.'s REALTOR® Action Fund. If you have any questions or comments, please contact Lindsey Gieck at (916) 492-5210."

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3. If The Member Does Not Want To Invest:

"I understand that \$197 may seem like a lot, but Imagine for a moment, that California Association of REALTORS® did not have a Government Affairs Team and REALTOR® Action Fund... The threats listed below could have affected the way you do business!

The California Association of REALTORS®:

PRESERVED: Property Profiles: Title insurance companies stopped providing property profiles in a reaction to a letter issued by the Department of Insurance. C.A.R. worked to restore access to protect your business;

DEFEATED: 3% Independent Contractor Withholding: 3 times in 2009! Politicians proposed an acceleration of income tax payments in the form of 3% withholding; and

DEFEATED: Point of Sale Bills: Multiple bills were introduced, which if passed, could have resulted in, as much as, \$20,000 of costs per home to close escrow.

Given California's ongoing state budget shortfall, this will be another contentious year. Your support is needed now more than ever. To preserve C.A.R.'s ability to fight for you! Again, dues billing cycle is underway; please invest \$49 in the REALTOR® Action Fund!

The REALTOR® Action Fund protects you from the politicians. The Fund is non-partisan and supports pro-real estate and business Democrats, Republicans and Independents.

4. If the Member's Answer Is Still "No": "Thank you for your time and for your continued membership with C.A.R. Goodbye."

Note: If the member is unavailable, do not leave a message on his or her answering machine/voicemail; simply call the member back at a later date and time.