



REALTOR[®] PARTY
★ of CALIFORNIA ★
CALIFORNIA ASSOCIATION OF REALTORS[®]

FUNDRAISING GUIDE

FOR

REALTOR[®] ACTION FUND



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WELCOME!

On behalf of the California Association of REALTORS® (C.A.R.), the REALTOR® Party of California (RPC) Committee Leadership wants to thank you for your support of the REALTOR® Action Fund and helping C.A.R. and your local Association reach our yearly goals!

The REALTOR® Party of California fundraising guide for REALTOR® Action Fund is designed to provide you with a step by step guide to fundraising, including collateral materials you need to educate and inform your members on the importance of the REALTOR® Action Fund.

Together we can successfully educate and encourage REALTORS® to invest in the REALTOR® Action Fund. We believe this blueprint will help you accomplish these goals!

We appreciate your commitment to organized real estate and support of the Political Programs. If you have any questions, please contact your C.A.R. staff listed below.

Sincerely,

Your RPC Leadership

C.A.R. Staff

Matthew Bunch

C.A.R. Director

matthewb@car.org

Lisa Edwards

RPC Coordinator

lisae@car.org



IMPORTANT ACRONYMS

AE – Association Executive
ALF – Advocacy Local Funds
AOR – Association of REALTOR®
CAP – NAR Corporate Ally Program
CGR – Chartered NAR Golden R
CSB – California Silver Bear
CSR – Chartered NAR Sterling R
CREPAC C.A.R. – California Real Estate Political Action Committee-California Association of REALTORS®
CREPAC Federal-C.A.R. – California Real Estate Political Action Committee/Federal-California Association of REALTORS®
CREIEC-C.A.R. – California Real Estate Independent Expenditure Committee-California Association of REALTORS®
DBS – Dues Billing Statement
FPPC – Fair Political Practice Commission
FEC – Federal Election Commission
FPC – Federal Political Coordinator
GAD – Government Affairs Director

HAF – Housing Affordability Fund
IE – Independent Expenditure
IAF – Issue Action Fund
IMPAC – Issues Mobilization Political Action Committee
KC – Key Contact
LCRC – Local Candidate Recommendation Committee
LGR – Local Government Relations
NCR – NAR Crystal R
NGR – NAR Golden R
NPR – NAR Platinum R
NSR – NAR Sterling R
PAC – Political Action Committee
PAF – Political Activities Fund
RAA – REALTOR® Action Assessment
RAF – REALTOR® Action Fund
RPAC – REALTORS® Political Action Committee
RPC – REALTOR® Party of California
YPN – Young Professionals Network



For more useful information and resources to help your fundraising efforts, visit:

raf.car.org



INTRODUCTION - REALTOR® ACTION FUND (RAF)



Watch at raf.car.org

MISSION STATEMENT

The mission of the committee is to raise funds for the REALTOR® Action Fund (RAF), to provide education, training and tools to local associations which will enable them to increase REALTOR® participation in political fundraising, education, and grassroots involvement as well as increase C.A.R.'s political and legislative effectiveness. Additionally, the committee may make recommendations for consideration in the usual planning process in the areas of member education, member mobilization and other political activities. (April 2020)

GOALS

- » Increase voluntary participation to the current year's goal
- » Raise the current year's RAF Contributions goal

OBJECTIVES

- » Educate your members of the importance of RAF
- » Achieve 20%+ voluntary RAF Participation
- » REALTOR® Action Fund: above-the-line on the dues billings statements
- » 100% C.A.R. Directors contributing at \$148

WHAT IS RAF DOING FOR YOU?

FIGHTING

**Costly and Time
Consuming Point of
Sale Bills!**

FIGHTING

**Independent
Contractor
Withholding!**

FIGHTING

**Statewide Service
Taxes!**

PRESERVING

Dual Agency!

PRESERVING

**Mortgage Interest
Deduction!**

PROTECTING
**PRIVATE
PROPERTY
RIGHTS**
ON EVERY LEVEL!!



VISUALIZE YOUR GOAL!

VIRTUAL RAF-O-METER

Great visual for tracking your goals and sharing your progress with your members on their successes! It is so easy...

Step 1: Complete RAF-O-Meter Application

Step 2: Submit to C.A.R. with your logo

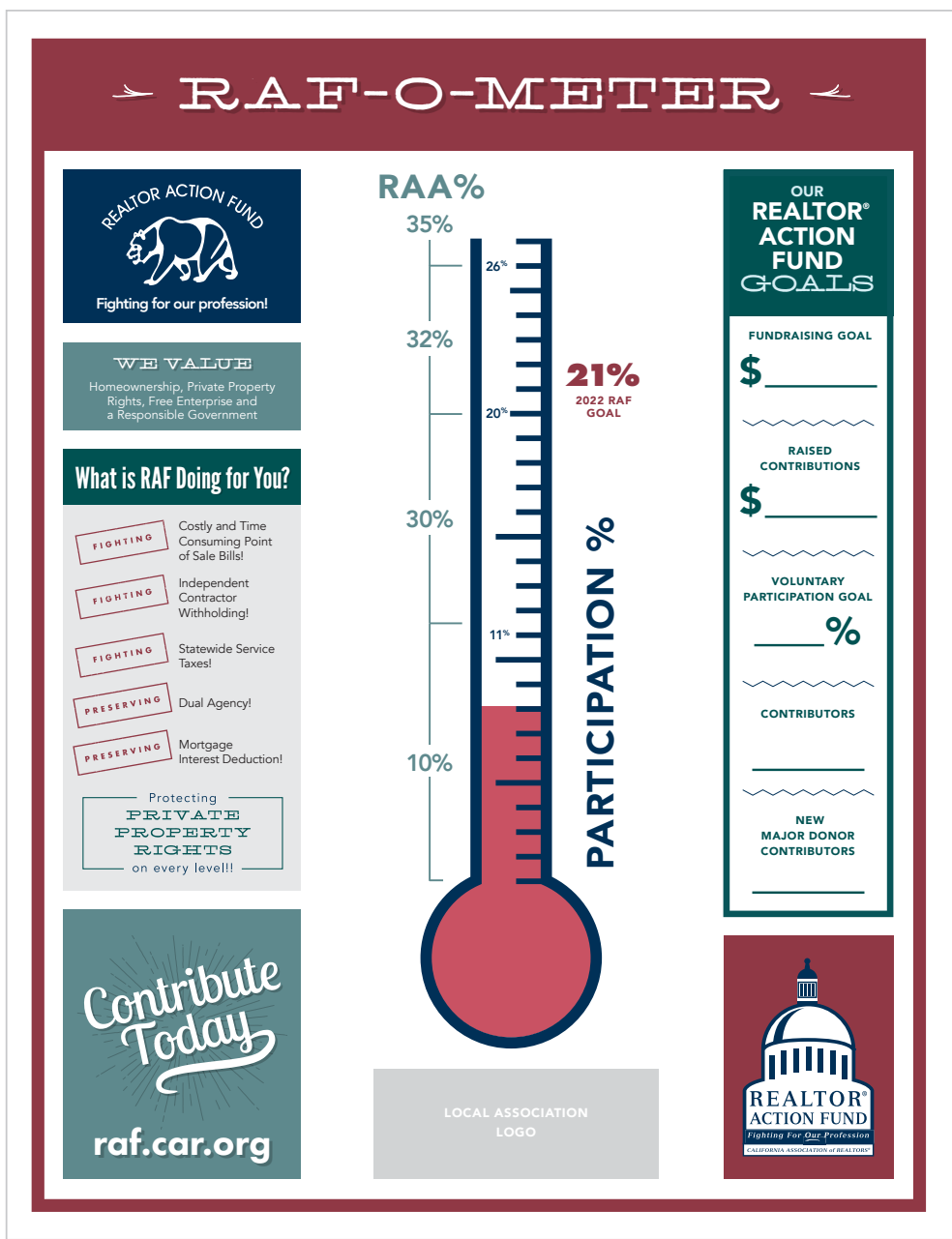
Step 3: C.A.R. creates your "printable" poster

Step 4: Take to your local Printer to create an erasable poster

Step 5: Complete your LCRC Reimbursement for the printing costs.

Step 6: Track your goals and show your progress

View
sample on
raf.car.org





PLANNING YOUR YEAR

STEP 1 ESTABLISH A RPC TEAM

RPC team members should have a willingness to inform and educate their members on the importance of the REALTOR® Action Fund. The team should be representative of the local association.

STEP 2 PULL REPORTS FROM AI360

Pull reports from the year prior to determine your local association's overall standing. Reports to consider include:

- » Contributors or Non Contributors Report
- » Office to Office Contribution Report
- » Individual Contribution Report



**All fundraising activities and flyers
MUST BE approved by C.A.R.!**

Contact Lisa at LisaE@car.org.

STEP 3 FUNDRAISE!

Depending on the time of year, continue with the following fundraising activity:

NOVEMBER to FEBRUARY

- » Office to Office Contest
- » Sweepstakes Fundraiser, in conjunction with dues billing statement
- » Do a Phone Bank Event for Dues Billing.

FEBRUARY to MAY

- » Sweepstakes Fundraiser
- » Email Campaign

MAY to AUGUST

- » Email Campaign

CONTRIBUTOR RECOGNITION

RAF Recognition Event(s) and/or Commemorative Award(s) by a local Association either individually or collectively, shall not exceed 10% of the RAF amount raised by the local Association in the preceding calendar year.

View
checklist on
raf.car.org



STEP 4 FOLLOW THE 1/3 RULE

You must raise three times the fair market value of the sweepstakes prize(s) or when creating an in-person event.

STEP 5 REVIEW YOUR PROGRESS

Review the RAF checklist on raf.car.org to help you and your team plan for the new year. After every fundraiser, review your progress to re-evaluate your team's RAF fundraising plan.

- » How much in contributions were received?
- » How many were new contributors?
- » How many were new major investors?
- » Were your efforts effective?
- » Did you do a recognition event?



WHAT ARE YOUR RAF GOALS FOR YOUR LOCAL ASSOCIATION?

What is your voluntary participation goal?

\$ _____

What is your fundraising goal?

_____ %

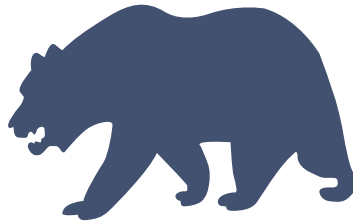
How many new \$148 contributors do you want to secure?

How many major contributors would you like to secure?

Does your local Association have a RAF Team? **YES** or **NO**

Will your local Association provide recognition for your RAF contributors? **YES** or **NO**

What are the top three local issues for your local Association:



RAF FUNDRAISING BLUEPRINT

**YOU CAN FIND THE
FOLLOWING DOCUMENTS
ON [RAF.CAR.ORG](https://raf.car.org)**

THE 1/3 RULE

RAF FUNDING FLOW CHARTS

RAF-O-METER

APPLICATION-RAF-O-METER

RAA/RAF PARTICIPATION FUNDING FAQ

FAQ



FINANCE PROCESSES

DUES ARE NOT DEDUCTIBLE AS CHARITABLE CONTRIBUTIONS

Dues payments & assessments (local association, C.A.R. & NAR) and contributions to REALTOR® Action Fund are not tax deductible as charitable contributions at the Federal level.

DBS MARKETING MATERIALS

Make your Dues Billing Statement (DBS) stand out by using RAF marketing pieces.

FORWARDING CONTRIBUTIONS RECEIVED

- » By providing the NRDS # for each contributor, C.A.R. will have all necessary information required for FPPC reporting.
- » Local associations conducting fundraising activities are required to forward all contributions received within 10 days of receipt. California law requires.
- » "Casino Night" format **CANNOT BE USED** as a fundraiser to raise RAF investment contributions.

NO MONEY ORDERS OR CASH CONTRIBUTIONS

Under no circumstances may your association accept cash payments. California law no longer permits payments by cashier's check or money order that exceed \$100. However, C.A.R. does accept checks and most credit cards.

ONLINE CONTRIBUTIONS

RAF Contributions online is up and ready to process contributions. The member must have their NRDS ID number to login. **All monthly payment plans/ contributions must be completed by the second Friday in December.**

You may find the RAF login page at:

<http://raf.car.org>

Below are some basic instructions for making an online payment:

- 1. Log in with your NRDS #**
- 2. Basic Information:**
Make sure all your information is correct.
- 3. Credit Card Contribution Amount:**
Choose your desired amount.
- 4. Recurrence:** Monthly or One-Time
- 5. Billing:** Fill in your billing information.
- 6. Check the verification box.**
- 7. Process contribution.**

**To order
marketing
pieces, see
order form on
raf.car.org**

»



AFFILIATE CONTRIBUTIONS



PROTOCOLS FOR AFFILIATES TO MAKE A CONTRIBUTION

The California Association of REALTORS® has been asked, can an affiliate contribute to the REALTOR® Action Fund? The answer is NO, they cannot contribute to REALTOR® Action Fund! However, an affiliate can contribute to support the California Real Estate Independent Expenditures Committee (CREIEC), one of the four Political Action Committees (PACs) sponsored by the California Association of REALTORS®! CREIEC is an independent expenditure committee that independently advocates for or against candidates in accordance with the interests of the real estate industry.

QUESTIONS?

If you have any questions, please contact Lisa Edwards at 916-492-5211 or lisae@car.org.

To ensure compliance with the FPPC and FEC rules, the following protocols must be followed:

1. An Affiliate cannot contribute to REALTOR® Action Fund, an Affiliate can ONLY contribute directly to CREIEC, California Real Estate Independent Expenditure Committee.
2. An Affiliate can ONLY pay with a check, no credit card contributions are accepted by C.A.R., and the check must be made payable to CREIEC.
3. Local Associations can accept credit card contributions from Affiliates. HOWEVER, the local Association must then send C.A.R. a check made payable to CREIEC for the amount received and provide the name(s) and NRDS* numbers for the affiliate(s) that made the contribution.

** Must be done prior to sending an Affiliate contribution(s) to C.A.R., a local Association must create a record for an Affiliate in NRDS, which will generate a NRDS#. Please choose "Affiliate" (AFF) for member type.*

4. An affiliate's contribution counts towards participation, but no funds** are directed to the local's sub-accounts, LCRC, IM-PAC and ALF. All contributions received from an affiliate(s) are deposited into the CREIEC, California Real Estate Independent Expenditure Committee.

*** Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). All contributions received will go to the California Real Estate Independent Expenditure Committee-California Association of REALTORS® ("CREIEC"), which makes independent expenditures in support of or opposition to candidates.*

5. Each Affiliate must submit a fully completed Affiliate Contribution Form with their contribution check.



RAF CONTRIBUTION BREAK DOWN – YOUR FUNDS AT WORK

The following illustrations provide the detail on how the voluntary RAF contribution is distributed to the local association's Local Candidate Recommendation Committee (LCRC)/ Issue Mobilization Political Action Committee (IMPAC)/Advocacy Local Funds (ALF) subaccounts depending on how the Local Association does their 30% split. Below is based on a 30/30/40 split among the locals LCRC/IMPAC/ALF subaccounts.

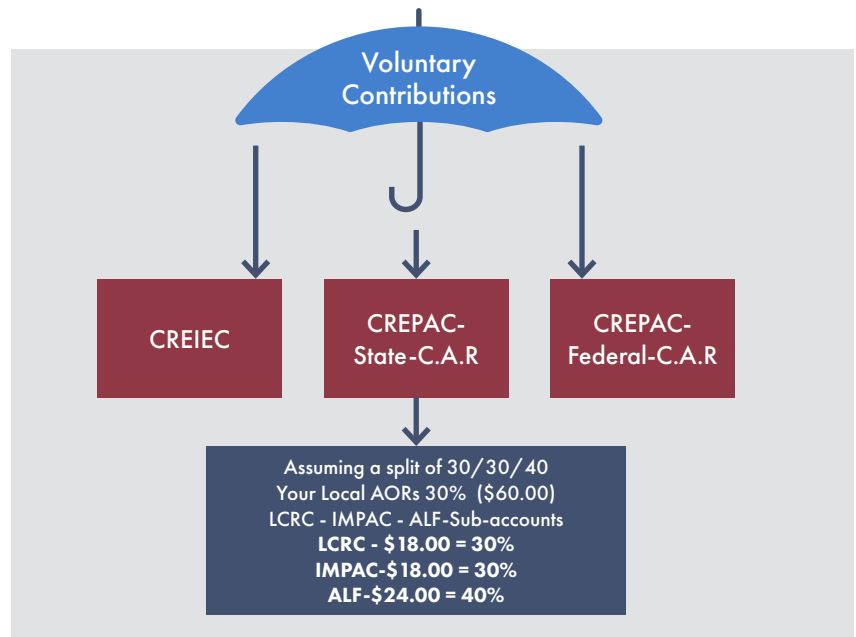
* These charts only reflect personal contributions to RAF

CREIEC California Real Estate Independent Expenditure Committee

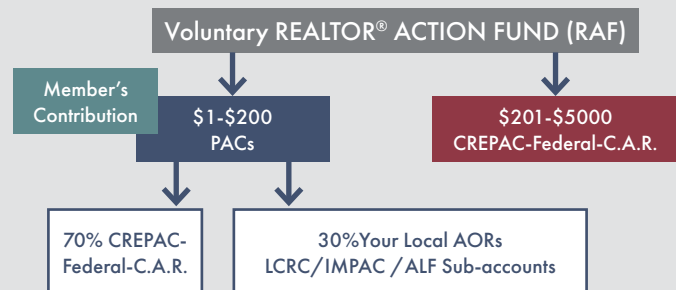
CREPAC California Real Estate Political Action Committee

LCRC Local Candidate Recommendation Committee

ALF Advocacy Local Funds

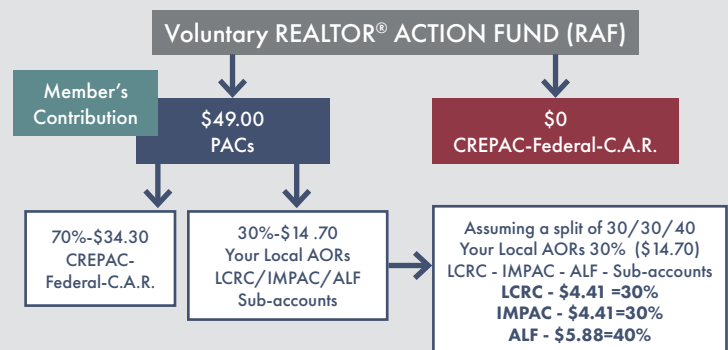


RAF CONTRIBUTION BREAK DOWN- YOUR FUNDS AT WORK



EXAMPLE

RAF CONTRIBUTION BREAK DOWN- YOUR FUNDS AT WORK





MAKING AN ONLINE CONTRIBUTION

Remember: raf.car.org will take you to the RAF Webpage...follow these instructions to make a contribution.

Step 1

Open browser and type raf.car.org. When you click, it will take you to the sign in page

Step 2

Sign in and you will be redirected to the REALTOR® Action Fund Webpage

Step 3

Click on "Contribute Today"

Step 4

Enter your NRDS#

Credit Card Donation

Step 5

Make your contribution

Basic Information:

Make sure all your information is correct.

Credit Card Contribution Amount:

Choose your desired amount.

Recurrence:

Choose Monthly (default) or One-Time

Billing:

Fill in your billing information.

Disclaimer:

Check the RAF verification box for disclaimer

Click "Submit"



VIEWING MEMBER CONTRIBUTIONS ONLINE

A member can now view their REALTOR® Action Fund (RAF) Contributions on C.A.R.'s website. The member will see the previous year and the current year. The previous year will show the total RAF Voluntary Contributions, as well as, the RAF level that correlates to the contribution. The current year will show how much a member has contributed to date. Although, the RAF level will not be listed in the current year until year end, the member can see what their level was for the previous year. Below are some simple instructions for the member on how to see their RAF contributions on their online profile.

Step 1

Log in to the C.A.R. website

Step 2

Click on your name in the upper right corner

Step 3

Click on your name and the "My Account" webpage will appear

Step 4

Click on Account Settings on the right side of "My Account" webpage

Step 5

Then scroll down the Account Setting page to the Section labeled "Additional Member Information"

The screenshot illustrates the process of viewing member contributions on the C.A.R. website. It shows the navigation bar with links like TRANSACTION CENTER, LEARN & THRIVE, INDUSTRY 360, and YOUR C.A.R., along with a user profile dropdown for 'HI LISA'. The 'My Account' page is displayed, with 'Account Settings' highlighted in the sidebar. The 'Account Settings' page shows the user's name 'Lisa Edwards' and a 'SIGN OUT' button. The 'Additional Member Information' section is shown at the bottom, containing designations, RAF contributions, and committee info.

My Account

C.A.R. STAFF
INTRASECTION
BLOG ADMINISTRATION
ADP EZLABOR
COMMITTEE SELECTION PROCESS
ADMIN
RAF BALANCE

Account Settings

Change Username or Password
My Shortcuts & Events
Help
SIGN OUT

Account Settings

HOME > ACCOUNT SETTINGS

Lisa Edwards REALTOR®

Additional Member Information

Designations	RAF Contributions	Committee Info
N/A	Annual Contributions (2016) \$449.04 - California Silver Bear Current Contributions (2017) \$326.56	N/A



FUNDRAISING RECOGNITION LEVELS

REALTOR® ACTION FUND FUNDRAISING RECOGNITION LEVELS

The California Association of REALTORS® recognizes and appreciates all levels of participation to the REALTOR® Action Fund. Below are the descriptions for C.A.R. and NAR participation levels.

VOLUNTARY RAF FUNDRAISING RECOGNITION LEVELS

Introductory Level

\$20 Annual Contribution
» RAF Button

Minimum Cost of Doing Business:

\$49 Annual Contribution
» RAF Button

True Cost of Doing Business:

\$148 Annual Contribution
» New RAF pin
» New ribbon annually
» Invitation to C.A.R.'s, if applicable, special events
» Widget to display proudly on website or signature

NAR-MAJOR DONOR LEVELS

NAR Sterling "R": \$1,000 Initial Contribution: Sustain: \$1,000 Annually, as well as for current NAR President Circle member. (\$449 Annual Renewal for Chartered NAR Sterling "R's", prior to 12/31/2011)

- » NAR Sterling "R" pin given annually from NAR
- » Invitation from NAR to attend special functions during NAR meetings
- » New ribbon given annually from C.A.R.
- » Invitation to C.A.R.'s, if applicable, special events

NAR Crystal "R": \$2,500 Initial Contribution: Sustain: \$1,500 Annually or \$1000, if a current NAR President Circle member.

- » NAR Crystal "R" pin given annually from NAR
- » Invitation from NAR to attend special functions during NAR meetings
- » New ribbon annually from C.A.R.
- » Invitation to C.A.R.'s, if applicable, special events

NAR Golden "R": \$5,000 Initially: Sustain: \$2,000 Annually or \$1,000, if a current NAR President Circle member. (\$449 Annual Renewal for Chartered NAR Golden "R's" prior to 01.01.02.)

- » NAR Golden "R" pin given annually from NAR
- » Invitation from NAR to attend special functions during NAR meetings
- » New ribbon annually from C.A.R.
- » Invitation to the C.A.R.'s, if applicable, special events

NAR Platinum "R": \$10,000 Initially: Sustain: \$5,000 Annually

- » NAR Platinum "R" pin given annually from NAR
- » Invitation from NAR to attend special functions during NAR meetings
- » Invitation to RPAC President's Circle Conference
- » Invitation to the C.A.R.'s Capitol Reception in Sacramento
- » New ribbon annually from C.A.R.

NAR President Circle: \$2,000 contribution given annually to support Congressional Members both in California and other states.

- » NAR President Circle pin given annually from NAR
- » Invitation from NAR to attend special meeting held annually

C.A.R.-MAJOR DONOR LEVELS

California Silver Bear:

\$449 Annual Contribution

- » New Silver Bear pin
- » New ribbon annually
- » Invitation to C.A.R.'s, if applicable, special events
- » Widget to display proudly on website or signature

♦♦♦♦♦♦♦♦♦♦ LIFETIME CONTRIBUTION ACHIEVEMENTS ♦♦♦♦♦♦♦♦♦♦

NAR

Hall of Fame:

- » Lifetime contributors exceeding \$25,000 or \$50,000 will receive a commemorative RAF crystal paperweight to reflect their monumental contribution!
- » As well as recognition at the NAR Level.

C.A.R.

C.A.R. Gold VIP:

(Lifetime contribution of \$10K and current RAF contributors) C.A.R. Gold VIP benefits:

- » New Gold VIP pin and Gold VIP Widget to display proudly on website or signature
- » Designated VIP bar at C.A.R.'s, if applicable, special events
- » Priority seating at Legislative Day and Relmagine! luncheons (Advanced payment required for C.A.R. luncheons)
- » Recognition in Fall Edition of the California Real Estate Magazine
- » C.A.R. Recognition during C.A.R. Fall Business Meetings
- » Provide "promo" code for a discount to attend the paid sessions at the Relmagine! or Woman Up!



CONTRIBUTION FORM

HELP PROTECT YOUR LIVELIHOOD CONTRIBUTE TO THE REALTOR® ACTION FUND TODAY!

CONTRIBUTOR INFORMATION

NAME (please print): _____

NRDS #: _____ ASSOCIATION: _____ REGION: _____

BILLING ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE NUMBER: _____

EMAIL: _____

COMMITMENT LEVEL

REALTOR® ACTION FUND VOLUNTARY CONTRIBUTION*

☐ \$20☐ \$49☐ \$148INTRODUCTORY
LEVEL"THE MINIMUM
COST of DOING
BUSINESS""THE TRUE
COST of DOING
BUSINESS"

CALIFORNIA MAJOR DONOR VOLUNTARY CONTRIBUTION*

☐ \$449
ANNUALLY

CALIFORNIA SILVER BEAR

NAR MAJOR DONOR VOLUNTARY CONTRIBUTION*

NAR Sterling "R"

☐ \$1000 ANNUAL☐ \$449 SUSTAINING
Chartered NAR Sterling
"R" (formerly known as the
California Golden "R", prior
to 12/31/2011)

NAR Crystal "R"

☐ \$2500 INITIAL☐ \$1500 SUSTAINING☐ \$1000 SUSTAINING
For NAR President Circle
Members

NAR Golden "R"

☐ \$5000 INITIAL☐ \$2000 SUSTAINING☐ \$1000 SUSTAINING
For NAR President Circle Members☐ \$449 SUSTAINING
Chartered NAR Golden "R" (prior to 1/01/02)

PAYMENT & SUBMISSION

*Payment plan available for all levels
(for specific details visit our website listed below)PAYMENT PLAN? ☐ YES ☐ NOPAYMENT METHOD: ☐ VISA ☐ MASTERCARD ☐ AMERICAN EXPRESS ☐ DISCOVER

CREDIT CARD #: _____ EXP DATE: _____

CARD TYPE: ☐ PERSONAL ☐ CORPORATE

FAX this completed form to 916.492.5290 or;

ONLINE go to raf.car.org

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, and the amounts above are only guidelines; you may give more, less or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.





HOMEOWNERSHIP MATTERS
HELP
PROTECT
YOUR
LIVELIHOOD

C.A.R.'s REALTOR® Action Fund



FIGHTING for
OUR PROFESSION!

WE VALUE

Homeownership, Fair Housing, Free Enterprise
and a Responsible Government!



Yes. I will contribute
to the voluntary
REALTOR® ACTION
FUND because it is
needed to protect
my livelihood.

FOR MORE
INFO →



(916) 492-5211
raf.car.org

What is RAF Doing for You?

FIGHTING

Costly and Time
Consuming Point of
Sale Bills!

FIGHTING

Independent Contractor
Withholding!

FIGHTING

Statewide Service
Taxes!

PRESERVING

Dual Agency

PRESERVING

Mortgage Interest
Deduction!

Protecting
**PROPERTY
RIGHTS**

on every level!!

MAKE A DIFFERENCE

Contribute
Today

The REALTOR® Action Fund (RAF) raises money to
promote the values, attitudes, and beliefs of
organized real estate; every dollar is used to protect
and advance REALTORS® interests in government.

raf.car.org



RAF INVESTMENT PARTICIPATION FUND MOTION: FREQUENTLY ASKED QUESTIONS

1. WHAT IS THE REALTOR ACTION FUND INVESTMENT PARTICIPATION FUND MOTION?

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.

2. WHEN DOES THE MOTION GO INTO EFFECT?

Answer:

The RAF Investment Participation Fund motion was passed by the C.A.R. Board of Directors during the 2016 Spring Business Meetings, to go into effect as of January 2017. In other words, local Associations have until December 16th to raise their RAF participation, at which point C.A.R. will use their RAF participation to determine their RAA local allocation for 2017.

3. WHAT IS THE FINAL DATE FOR LOCAL ASSOCIATIONS TO TURN IN THEIR RAF CONTRIBUTIONS TO C.A.R. FOR THEIR RAF PARTICIPATION RATE?

Answer:

All RAF contributions funds which include names and corresponding funds must be received by C.A.R. by **the second Friday in December** to count towards a local Association's participation rate of that year. The website for collecting contributions **will go "dark" on the second Friday in December.**

4. WHAT IS THE DATE FOR WHICH YOU WILL DETERMINE THE MEMBERSHIP COUNT FOR EACH LOCAL ASSOCIATION IN ORDER TO CALCULATE THE RAF PARTICIPATION RATE?

Answer:

The membership data is given to C.A.R. by the National Association of REALTORS® and the data is based on all the state's membership numbers as of September 30, of the fundraising year that would be used for the preceding year. For example, the membership count for 2017 will be based on the September 30, 2016 NAR numbers.

5. WHAT HAPPENS IF A LOCAL ASSOCIATION'S RAF PARTICIPATION RATE IS BELOW 12%?

Answer:

If a local Association does not reach 12% RAF participation, C.A.R. will deposit 10% of the REALTOR® Action Assessment (RAA) into the local Association's subaccount, per their local allocation split, the remaining 20% will be dispersed to C.A.R.'s State PAC's.

6. DOES THE MOTION ONLY IMPACT RAA CONTRIBUTIONS?

Answer:

Yes, the funds are taken from the RAA ONLY. This includes both through dues billing and from any new members that join throughout the year.



7. WHAT IS THE ABSOLUTE MINIMUM THAT A MEMBER MUST CONTRIBUTE TO BE COUNTED TOWARDS A LOCAL ASSOCIATION'S RAF PARTICIPATION?

Answer:

The RAF participation level settled on by the Task Force is \$20, the introductory level.

8. ARE THERE ANY OTHER FUNDRAISING RULES THAT WE NEED TO KNOW IN ORDER TO BE IN COMPLIANCE?

Answer:

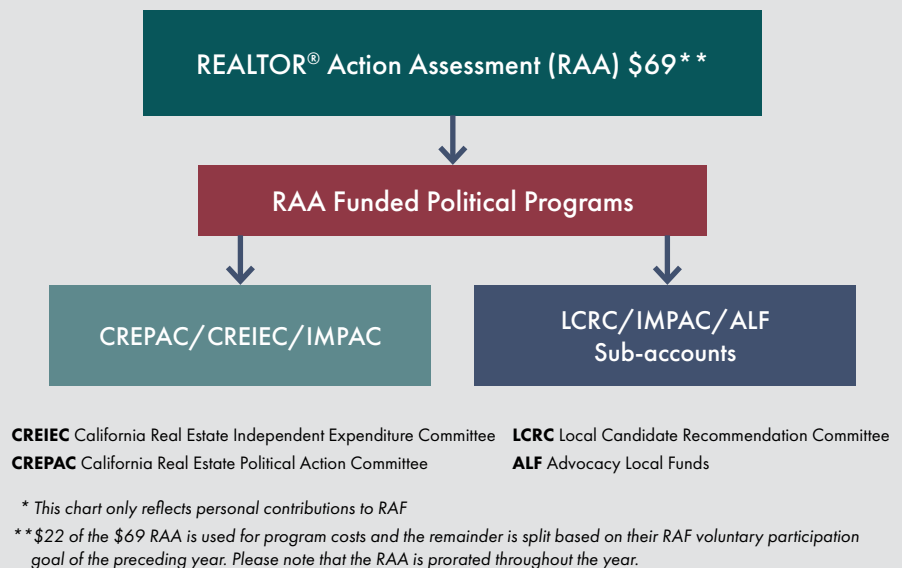
Not at this time, however, we must always comply with FPPC/FEC rules...stay tuned.

9. CAN YOU PROVIDE EXAMPLES OF HOW THE RAA FUNDS WILL BE AFFECTED BY THE MOTION? SPECIFICALLY, HOW IT WILL AFFECT THE LCRC/IMPAC/ALF SUB-ACCOUNTS?

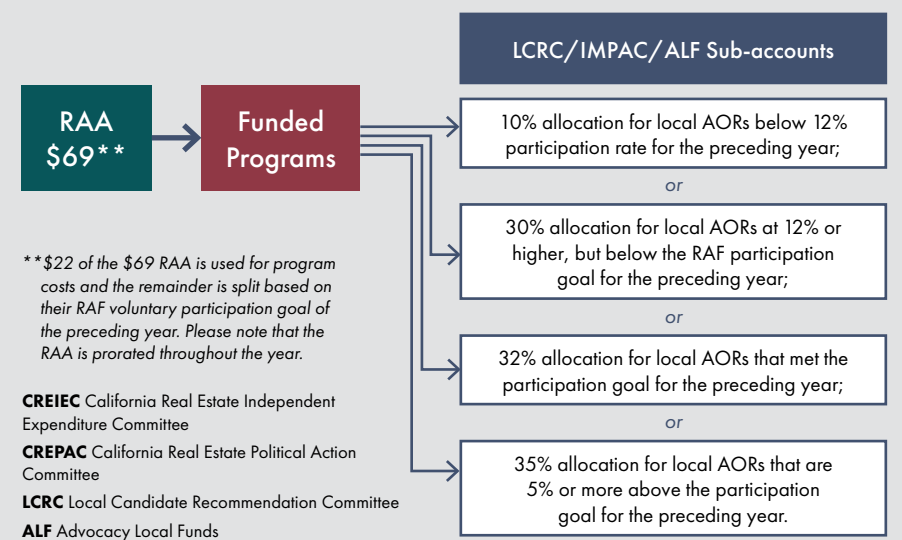
Answer:

See charts to the right, to view larger, see raf.car.org.

RAA FUNDING FLOW CHART



REALTOR® ACTION ASSESSMENT (RAA) FUNDING FLOW CHART



Continued →



RAF INVESTMENT PARTICIPATION FUND MOTION: FREQUENTLY ASKED QUESTIONS

10. WHAT OTHER FUNDRAISING EFFORTS DID THE RAF TASK FORCE DEVELOP AND ADOPTED TO ASSIST LOCAL AORS IN THEIR EXISTING FUNDRAISING EFFORTS?

Answer:

C.A.R. will display local Association's 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 Fall C.A.R. business meetings.

One-time ONLY-Each local Association will receive a digital picture frame to display their own RAF contributors and participation rate. Picture frames have been sent.

11. HOW IS C.A.R. SUPPORTING LOCAL ASSOCIATIONS IN THEIR FUNDRAISING EFFORTS TO HELP LOCAL ASSOCIATION'S ACHIEVE THEIR PARTICIPATION GOALS? C.A.R. PROVIDES THE FOLLOWING RESOURCES:

Answer:

- Fundraising emails will continue to be sent to specific targets by C.A.R. throughout the year which will be aimed at non-contributors.
- Planning is underway to expand the email campaign efforts to include targeting major investors.

- Each local Association will receive a hard copy of the RAF Blueprint via mail.
- The digital version of the RAF Blueprint will continue to be available on the C.A.R. website.
- 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.
- Updated RAF videos which can be used at new member orientations or other meetings will continue to be available online.
- RAF Training by C.A.R. field mobilization staff will continue to be available for local Association staff and members.
- RAF Training on AI360 (specific to California), RAF's contribution database, will continue to be available to AE's and GAD's.
- Customized RAF contribution reports will continue to be available to help local Association staff and members develop a targeted fundraising strategy for contributors.
- 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.
- 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.



EMAIL DUES BILLING SWEEPSTAKES PROMOTION



EMAIL DUES BILLING SWEEPSTAKES FUNDRAISERS

Each local RAF Team can offer their members an opportunity to win a prize in exchange for their contribution while paying their dues. Now, you can maximize your participation by creating an email campaign in conjunction with your dues to promote the sweepstakes. For purposes of this training, we are using Mammoth Lakes Board of Realtors®, "our test pilot" for this program. Please follow these steps for a successful Email Dues Billing sweepstakes fundraiser:

STEP 1: Complete Dues Billing Sweepstakes Application and the Budget Worksheet. Reminder: The 1/3 Rule still applies.

STEP 2: Submit completed sweepstakes application and budget worksheet to C.A.R. with your logo.

STEP 3: C.A.R. will create your distribution flyer for the dues billing sweepstakes and the appropriate rules. As well as RAF Webform branded to your specific local Association.

STEP 4: C.A.R. will create a RAF Webform branded to your specific local Association.

STEP 5: Rules-Email Promotion of your Sweepstakes. Must notify all your members, either by direct mail, email, your local Association newsletter. You must provide a portal that requires a login for your members to access on the local Association home page. This must be in all correspondence to your members. Alternatively, on the email, you can attach a copy of the flyer and rules. The "key" is to be sure that all your members have the ability to review all the rules and disclosures for the sweepstakes.

EMAIL SWEEPSTAKES ANNOUNCEMENT

The subject line is the type of RAF Sweepstakes and the body of the announcement highlights the "essence" of the sweepstakes and it must provide a link for a member to view the rules and/or make a contribution (see sample attached).

Must have the following two items on the email announcement:

*1. For a complete set of rules go to [insert local AOR's website address] or email [insert contact's email address]; no purchase necessary, void where prohibited by law; the sweepstakes will be conducted [insert start and end date of sweepstakes]; eligibility restriction apply, available only to [insert local AOR name] members; only one entry per member, depending on their contribution (the portion highlighted is specific to the local AOR's sweepstakes rules and will be provided by C.A.R. Staff).

2. **Disclaimer:** Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

As they say in the real estate business "timing is everything!" What better time than when a member is paying their dues.

NEXT STEPS

Once you have noticed all your members about the sweepstakes as discussed. The next steps are the email campaign that you will work directly with AI360 and C.A.R. Staff.

AI360 will design the email to include all the legal requirements (reviewed and approved by C.A.R. staff)

AI360 will pull the target lists and provide the timeline

See Samples →

raf.car.org



EMAIL DUES BILLING SWEEPSTAKES FUNDRAISERS

SWEEPSTAKES ANNOUNCEMENT TO MEMBERS

Subject: You could win 1 of 3 Visa Gift Cards in the Mammoth Lakes RAF Sweepstakes

Dear X:

With a contribution to the REALTOR® Action Fund (RAF) of \$20 or more you will be entered to win a 1 of 3 gift cards. The first drawing is for a \$25.00 gift card for members contributing \$20-\$48.99; the second drawing is for a \$150.00 gift card for members contributing \$49.00-\$147.99 and the third drawing is for a \$250 gift card for members contributing \$148 and above in the Mammoth Lakes BOR RAF 2018 RAF Sweepstakes! All existing 2018 contributors are automatically entered into the appropriate drawing corresponding to the amount of their contribution.

Sweepstakes open to Mammoth Lakes BOR REALTOR® members only. To contribute click [here](#). If you don't know if you are a contributor yet, please contact Stacey Castellano, AE at info@mlbor.com or (760) 934-4637.

The drawing will be held at the MLBOR Appreciation luncheon on April 3, 2018 at Roberto's Cafe in Mammoth Lakes. You do not need to be present to win. All contributions must be received by March 31, 2018. For odds of winning, other details and complete rules, click [here](#) (link to MLBOR website with rules).

The RAF is the backbone of REALTOR® political engagement funding our advocacy work on local, state and national issues. Without the RAF REALTOR® would have no voice in shaping our nation's policies. The amount of funds dedicated to the MLBOR area is tied to the number of MLBOR primary REALTOR® members who contribute. The more members who contribute, the more funds are dedicated to the Mammoth Lakes area.

Please to contribute today to protect homeownership and your bottom line.

*No purchase necessary; void where prohibited by law; the sweepstakes begins with the 2018 Dues Billing and ends on March 31, 2018.

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes.

Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

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EMAIL DUES BILLING SWEEPSTAKES FUNDRAISERS

MAMMOTH LAKES BOARD OF REALTORS® AI360 EMAIL CAMPAIGN WITH SWEEPSTAKES

EMAIL CAMPAIGNS

Suggested Timeline:

March 1 March 6 March 14 March 26
Email 1 Resend Email 1 Email 2 Resend Email 2

Target Audience:

Members who have not contributed so far in 2018

Subject Email 1: Mammoth Lakes REALTORS® - Protect Your Livelihood

Subject Email 2: Last Chance, Don't Miss Out

Dear <FirstName>,

Members of the Mammoth Lakes Association of REALTORS® are leaders in the real estate industry. We work hard and strive to do the best for our clients. But I know that as REALTORS® we like to support local causes and have a little fun.

I hope you will join me and help protect our industry plus have a chance to win one of three Visa® gift cards. It's a win-win!

All contributions will go towards the REALTOR® Action Fund (RAF). RAF fights for issues at the local, state and federal level important to the real estate industry and make sure that the voice for our industry is heard by lawmakers.

Don't pass up the opportunity to support a great cause! The more you donate, the more you can win. Details of the sweepstakes are below.

RAF Sweepstakes:

- Deadline to contribute is March 31, 2018
- Appreciation Luncheon April 3, 2018

Thank you and best of luck in the sweepstakes!

Sincerely,

Name
Title
2018 RAF Contributor

For Additional Details, [CLICK HERE](#)

*No purchase necessary; void where prohibited by law; the sweepstakes begins with the 2018 Dues Billing and ends on March 31, 2018.

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes.

Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

raf.car.org





REALTOR® ACTION FUND SOCIAL MEDIA GUIDELINES

SOME IDEAS FOR SOCIAL MEDIA POSTS:

1. Thank your Major Donor contributors
2. Post your RAF events
3. Post RAF video
4. Invite members to volunteer for your RAF Phone Bank
5. Invite members to be part of the RAF Team

LOCAL ASSOCIATION'S USE OF SOCIAL MEDIA FOR RAF

Many REALTOR® associations are embracing social media tools such as Facebook, Twitter, and YouTube, and integrating these tools into their day-to-day activities. In some cases this includes using those tools in connection with RAF activities. The guidelines below are to remind association members and staff that RAF-related pages on social media sites are subject to both federal and state election laws, and these laws may require that the association regulate access to certain portions of the site. The Q&A below outlines some of the issues raised by association's use of social media for RAF activities, and some suggestions on how the association may address these issues.

CAN MY LOCAL ASSOCIATION USE SOCIAL MEDIA SITES FOR RAF?

Subject to the restrictions noted below, yes. The association may make certain RAF informational pages available to the public, such as posting meeting times and basic information about RAF. However, because RAF contributions may only be solicited from the so-called "solicitable class," which essentially consists of members

and their families, anything which could be considered a "solicitation" for an RAF contribution will need member-access only password protection.

WHAT RAF INFORMATION CAN BE PLACED ON THE ASSOCIATION SOCIAL MEDIA PUBLIC PAGES?

- » General information about RAF, such as contact information and staff.
- » General information about RAF activities, such as a calendar of RAF events.
- » RAF financial information, such as how much had been contributed or the number of contributors to RAF in a given period.
- » Information about contributions RAF has made to candidates.
- » A description of the restrictions under which RAF operates, such as that only members of the solicitable class may contribute to the RAF or who determines which candidates will receive RAF support.
- » Copies of the campaign finance reports filed with regulators like the Federal Election Commission or its state counterpart, setting forth the contributions received or disbursements made by RAF.
- » Members can place factual information about themselves for recognition they have received for their investments such as being a Major Investor, but cannot write posts encouraging others to make similar RAF contributions.

Associations must, however, carefully monitor the content of its site if it includes RAF information that goes beyond simply providing factual information and also constitutes a solicitation for RAF contributions. For example, the Federal Election Commission ("FEC") has determined that a PAC communication constituted a solicitation when the chairman of the PAC commended the enthusiasm of employees who participated in the PAC by making contributions because the communication indicated their awareness of the connection between their welfare and government policies toward the business. Such messages that encourage contributions to RAF may only be placed behind a member-access only password-protected



portion of the site. Such a message would include, for example, posting the names of contributors and the amounts contributed, particularly if those having made such contributions are favorably commended.

WHAT INFORMATION NEEDS TO BE BEHIND MEMBER-ACCESS ONLY PASSWORD PROTECTION?

All communications that constitute a “solicitation” need to be password protected. This would be true for private social media sites where solicitations are taking place, and those private sites will need to be limited to those within the restricted class.

WHAT CONSTITUTES A SOLICITATION?

A communication will constitute a solicitation if it “encourages... support [of] the PAC’s activities (by making a contribution) [or] facilitates the making of contributions.” Facilitation of the making of contributions would include providing information on how individuals may contribute to the PAC, such as by including in the communication an address to which a contribution may be sent.

Information about a PAC fundraising event does not constitute a solicitation and can be publicly available if it consists of nothing more than details about when or where the event will be held. However, information that expressly encourages attendance and/or RAF contributions at such an event, or information about where to send an RAF contribution, constitutes a solicitation.

WHO CAN ACCESS THE PASSWORD-PROTECTED CONTENT?

The password-protected content may only be accessed by RAF’s solicitable class. According to federal election law, that includes individual members -- i.e., non-corporate members of NAR -- and their families. The term “members” means all individuals who currently satisfy the requirements for membership in any one of the local, state, and/or the national associations and regularly pay dues.

Executive, administrative and management personnel of the local, state and/or national associations, and their families, are also included in the solicitable class.

CAN AN ASSOCIATION PROMOTE RAF FUNDRAISING EVENTS ON ITS PUBLIC PAGES?

An association could list RAF fundraising events on its public pages and calendars, but it will need to be careful that the name itself does not constitute a solicitation nor can there be specific information about the event beyond the date and time of the event. For example, the association could list “RAF Wine Night” on its public website calendar with a link to a password protected area of the site that would contain information about the event. However, an event named “Give to RAF” or “RAF Needs Your Contribution” could not be publicly displayed, since those names would constitute solicitations.

WHAT ELSE SHOULD ASSOCIATIONS DO WHEN USING ITS SOCIAL MEDIA SITE FOR RAF?

The association must, as noted, employ a member-access only password-protection feature for areas of the social media site that may include an RAF solicitation. The site administrator will should also implement a process that terminates an individual’s ability to access the protected portion of the site when association membership terminates.

The association must also decide whether to allow others to post messages in the public area of its social media site, and if so, must insure that messages of others do not contain solicitations for RAF contributions, which may only appear on a password protected page. If an association allows such postings, it may also want to include a disclaimer on the public page reminding members that any RAF-related messages may only contain general information, and may not solicit RAF contributions or provide information about making or encouraging contributions to the PAC.



EFFECTIVE MESSAGING

WHAT MAKES A GOOD PITCH?

- A. Your messaging should be short but compelling
 - › Let them know you made a \$148 contribution
- B. Relevant and consistently stated through a variety of mediums over an extended period.
 - › Have a one-line answer memorized for why you personally contributed to RAF.
- C. Keep up with current local events and understand the local “hot issues” that will affect your members.
- D. Ask everyone to pay on the spot!
 - › Always end a presentation with: Can We Count on your Contribution today! If not, then complete a pledge card.
- E. Lastly, be sure to follow up!



30-SECOND “ELEVATOR” PITCH

Have you heard about the REALTOR® Action Fund (RAF)? Well RAF is a vital service for YOU and YOUR business. By contributing \$20 to the REALTOR® Action Fund, you are helping to protect private property rights thru C.A.R.’s lobbying efforts, and local issues and candidate campaigns. Your participation of \$20 will keep this going! Can we count on your contribution?

ALTERNATE PITCH:

If you have a sweepstakes going, you add ... “just for today we are offering you an opportunity to win a prize (explain what it is have a flyer ready to hand out), if you contribute to RAF today!



3-MIN RAF PITCH

Did you know that 30% of your RAF contribution supports local issues that will affect your livelihood? Hello, my name is _____. Thank you for allowing me to speak with all of you about the REALTOR® Action Fund (RAF). I only have 3- minutes, so let me get to the bottom line on the importance of REALTOR® Action Fund. Many of you may not be aware that:

- › Your RAF contribution helps put REALTOR® friendly candidates in office at your local. (i.e. city, county, board of education, mayors).
- › If applicable, insert a local issue
- › [If you are doing an office to office contest RAF provides a strength beyond anything we can accomplish individually. We are united in this together and we need your support today!
- › We need everyone to contribute to RAF



PAYMENT PLANS AVAILABLE

REALTORS® can make payments in monthly installments. Payment plans are available for \$49 and above. All payment plans must be completed by December of the current year.



The REALTOR® Action Fund is vital to homeownership and to the real estate industry. As REALTORS® we are the force behind protecting homeownership rights and keeping homeownership affordable. By protecting the home buying public we also protect our way of life and how we support our family. The government and others are always looking for ways to cut out a piece of the real estate pie for themselves. This is done by taxing the transaction or adding fees or inspections at the point of sale. These taxes and fees hurt the home buyer by making the transaction more expensive thereby, reducing affordability or, the fees come directly out of our pockets.

Contributions to the REALTOR® Action Fund have stopped:

1. Point of sale mandates that could have cost the homeowner \$1000s of dollars reducing their equity or may have even prevented the sale from going through.
2. Direct taxing of REALTOR® commissions and other services related to the transaction.
3. Political candidates who are against building housing and against REALTOR® issues.

Your contribution is critical to the REALTOR® organization; the homeowner and your business. Please contribute today to the REALTOR® Action Fund to protect your future.

SOME IDEAS FOR SOCIAL MEDIA POSTS:

1. Thank your Major Donor contributors
2. Post your RAF events
3. Post RAF video
4. Invite members to volunteer for your RAF Phone Bank
5. Invite members to be part of the RAF Team

DOs and DO NOTs for EFFECTIVE MESSAGING

DO:

- ✓ Use storytelling techniques. Tell a story
- ✓ Ask for just a few moments of their time
- ✓ Know your talking points
- ✓ Use a local, state and/or national example of how the REALTOR® Action Fund was successful
- ✓ Read the room. Each group is different, know your audience
- ✓ Encourage a contribution at any level
- ✓ Talk about why you personally contributed
- ✓ Show energy and passion
- ✓ Always assume that this is the member's first time ever hearing about the importance of the REALTOR® Action Fund
- ✓ Know that you can only ask REALTORS® (solicitable class) to contribute
- ✓ Always offer to be available for questions and one-on-one opportunities to discuss the value of the REALTOR® Action Fund
- ✓ Educate and inform members about REALTOR® Action Fund on Social Media. For more information, view the Social Media Guidelines

DO NOT:

- ✗ Be negative
- ✗ Say RAF. It's ALWAYS REALTOR® Action Fund, members might not know the acronym
- ✗ Solicit on Social Media. No comments encouraging REALTOR® Action Fund contributions. For more information, view the Social Media Guidelines
- ✗ Make it about a specific candidate, elected official or a political party
- ✗ Assume members have ever been asked to contribute to REALTOR® Action Fund

SOCIAL MEDIA GUIDELINES

- ✗ No online solicitation
- ✗ Members cannot write posts encouraging others to make similar contributions.

WHAT CAN YOU POST?

- ✓ General information about RAF, such as contact information and staff
- ✓ RAF financial information, such as how much had been contributed or the number of contributors to RAF in a given period. Members can place factual information about themselves for recognition such as a being a Major Donor.

CAN AN ASSOCIATION PROMOTE RAF FUNDRAISING EVENTS ON ITS PUBLIC PAGES?

- ✓ **Yes**, an Association can list RAF fundraising events on its public pages and calendars, PLEASE NOTE: THAT the Association needs to be careful that the name itself does not constitute a solicitation nor an there be specific information about the event beyond the date and time of the event. For example: the Association can list "RAF Wine Night" on it public website calendar with a link to a password protected area of the site that would contain information about the event. name itself. On the flipside, an event named Give to RAF or RAF needs your contribution" could not be publicly displayed, since those names would constitute solicitations.

CAN YOU RECOGNIZE YOUR CONTRIBUTORS?

- ✓ **Yes**, posting of members level of contribution, must be posted on the behind the member-access only password-protected, which is usually the members NRDS#.



RAF Strategies for Effective Messaging/Fundraising

Q&A

Questions

1. Why is raising money for the REALTOR® Action Fund (RAF) so important?

Answer

The REALTOR® Action Fund supports REALTOR®-friendly candidates who focus on the issues most critical to your business and your clients, at the local, state and federal levels. Low RAF participation levels of an AOR are often a sign of a lack of political awareness by AOR members – a detriment when in Sacramento alone, there are 5,000 new bills introduced in a two-year legislative cycle that could wreak havoc on our industry. RAF allows our REALTOR® Government Affairs Team to get good laws that are beneficial to REALTORS® get passed and bad laws get defeated.

2. What if, for example, I don't want my contribution funding that "one" Democratic candidate. Why should I still contribute?

Answer:

Okay, but don't you agree with the issues? By focusing on the issues most critical for your business and your clients, the REALTOR® Action Fund is about putting members in office who are REALTOR® friendly, whether Democrat, Republican, Independent, we are the REALTOR® Party and support candidates who support our industry!

3. What are some of the issues that the REALTOR® Government Affairs Team was able to avoid because of RAF?

Answer:

We avoided a bill that would add \$225 Per-Transaction Recording Fee (Transfer Tax). Several times we avoided a 3% Independent Contractor Withholding fee, and various other Point-of-Sale and a service tax bills. These are just a few examples of C.A.R.'s success stories that could not have happened without the REALTOR® Action Fund. Currently, some threats that are harmful to REALTORS® include a bill that would eliminate the Mortgage Interest Deduction, the GSE & Mortgage reform, other Point-of-Sale issues and an increase in recording fees. There is still a lot of work to be done.

Last Updated: 1/12/2016



RAF Strategies for Effective Messaging/Fundraising

Q&A

4. How can members contribute to the REALTOR® Action Fund?

Answer:

The most effective way of collecting the voluntary RAF contribution is during the dues billing process. Then have some “fun!” You can do a sweepstakes contest as an incentive for the member to contribute through their dues billing cycle. The collective efforts and contributions of the local associations and our members will allow C.A.R.’s Government Affairs Team to influence issues that impact the livelihood of REALTORS®.

5. What is C.A.R. doing to fundraise for the REALTOR® Action Fund?

Answer:

C.A.R. has implemented a “grassroots” strategy to reach and assist local AORs that have not reached the voluntary participation rate, and to focus on informing and educating members on the value of contributing to the REALTOR® Action Fund. Essentially, these grassroots efforts focus on peer to peer fundraising through local AOR fundraising activities. With the unsettled market conditions, RAF will continue to place emphasis on: (1) renewals, (2) the expansion of support among rank and file membership through local AOR fundraising activities and (3) targeted messaging.

6. How can local associations fundraise for RAF?

Answer:

C.A.R. has created an easy checklist located in the RAF Tool Kit to guide local associations through the steps of fundraising. The document includes: the first and most important step, establishing an RAF Team and second, different fundraising activities an AOR can participate in to engage their members. Starting in the fall and through the month of February, we suggest setting up an **Office to Office Contest**. Between the months of February to May, we suggest a **Sweepstakes Fundraiser** for sweepstake prizes like iPads, gift cards or a trip to Legislative Day. From May to August, local associations should focus on those members who still have not contributed by hosting an **In-person Fundraiser** like a luncheon, wine and cheese or a barbecue, or other types of events. For more information, please refer to the RAF Fundraiser Checklist for guidance. Consult with your RAF Field Staff person or email rafasst@car.org with any questions about fundraising events and contests.

Last Updated: 1/12/2016



RAF Strategies for Effective Messaging/Fundraising

Q&A

7. Why should a local association participate in an Office to Office Contest?

Answer:

It's the perfect way to get into the offices to educate them on the importance of REALTOR® Action Fund and create some friendly competition amongst offices to see which office raises the highest total voluntary REALTOR® Action Fund contributions. Offices are matched up to compete with offices that have similar agent counts. The winning office will be recognized at their local AOR.

Additionally, 30% of all money raised through RAF sweepstakes, office to office contests, in-person events and dues billing are distributed, as directed, by the local AOR among their LCRC/IMPAC/ALF sub-accounts which these funds will help ensure that issues that impact REALTORS® at the local level are also being addressed. Remember, 100% of contributions go to affecting the issues that matter most to REALTORS®.

8. How do I start an office to office contest at my local association?

Answer

First, it is important to discuss RAF with the AE, GAD and/or President of your local association, to establish an RAF team. The team should consist of members who have a willingness to inform and educate their members on the importance of the REALTOR® Action Fund. Team members should be representative of the AOR, including someone from the Board of Directors, the Local Candidate Recommendation Committee (LCRC) and/or major donors. Contact your RAF field staff person for help and resources to assist with this process.

Work with your RAF field staff person to review your office to office report from AI360 and to help you complete a distribution flyer for your office to office contest. Create a timeline and finalize dates for the contest, and promote the competition!

Last Updated: 1/12/2016



RAF Strategies for Effective Messaging/Fundraising

Q&A

9. What are some examples of ways the AORs can promote the office to office contest?

Answer:

Your RAF field staff should provide you with an application for you to fill out the details of the office to office contest to be included in the distribution flyer, or you can download this application directly from the RAF website. The application includes contest start and end dates, prizes and other important details of the contest. . Reach out to every office within your jurisdiction to ensure they are aware of the contest, and be sure to provide them with the distribution flyer. Prior to sharing this flyer on your Website, Facebook and Twitter, be sure to review the Social Media Guidelines in your RAF Tool Kit.

10. Besides Office to Office Contest are there other ways to fundraise?

Answer:

Another great way to raise valuable funds for the REALTOR® Action Fund is by hosting a sweepstakes contest. A contest amongst members within a local AOR, a RAF Sweepstakes gives members an incentive to contribute to the REALTOR® Action Fund. Any member who contributes to RAF within the sweepstakes beginning and end dates will be entered into a drawing for a prize. Prizes could include an iPad, gift cards of different values, a trip to Legislative Day.

11. Are there marketing materials for the sweepstakes?

Answer:

Yes! A similar flyer is available to be customized with your association's contact information and details of the contest. Again, contact your RAF field staff person to assist with finalizing the rules of your contest to include in the application. This information will be included in a distribution flyer for local AOR's to use to promote their contest.

For more information, go to raf.car.org.

Last Updated: 1/12/2016



SAMPLE OFFICE TO OFFICE CONTEST SCRIPT & TALKING POINTS

Hello, my name is _____. Thank you for allowing me to speak with all of you about the REALTOR® Action Fund. I'd like to talk to you about the importance of the REALTOR® Action Fund. For those of you who may not be aware:

- » Your RAF contribution helps put REALTOR® friendly candidates in office at your local (i.e. city, county, board of education, mayors).
(insert a local issue).
- » If you are doing an office to office contest, RAF provides a strength beyond anything, we can accomplish individually. We are united in this together and we need your support today!

FREQUENTLY ASKED QUESTIONS and/or COMMENTS:

QUESTIONS:

- » Excuse me, but I'm a registered Democrat and I really don't want to help fund a Republican.
- » I'm a Republican. I wouldn't want to fund a Democrat!
- » I don't agree with some of the candidates that the REALTOR® Action fund has supported!

ANSWER: I'm not asking you to make a political contribution, I'm asking you to make a business decision. By focusing on the issues most critical for your business and your clients, it is about supporting candidates who support our industry!

QUESTION:

- » I thought I already paid this through my yearly dues?

ANSWER: You paid the \$69 REALTOR® Action Assessment (RAA). None of that money can be used for federal issues, and we need to be stronger and better funded than the organizations that are sometimes adversarial.

QUESTION:

- » No one has ever asked me to contribute to the REALTOR® Action Fund before, and are there any perks to supporting the REALTOR® Action Fund?

ANSWER: This year we really want everyone to be a part of RAF. That's why we're going around talking to all of the offices. In fact we're having a contest between all of the offices. You can

contribute any amount, everything is appreciated, check or credit card. We just want you to be a part of the REALTOR® Action Fund. If you pay the \$148, The True Cost of Doing Business, you receive an invitation to C.A.R.'s Capitol Reception, during Legislative Day. We even offer payment plans! Lastly, 100% of your contribution goes to affect the issues that matter most to you and your clients.

QUESTION:

- » I'm not really worried. I'm not sure it makes a difference.

ANSWER: Someday an issue will get you worried, and you'll find out that's just the tip of the iceberg. REALTOR® Action Fund, from a REALTORS® perspective, helps good laws get passed and bad laws get defeated. In Sacramento alone, there are about 5,000 new bills introduced in a two year legislative cycle that could wreak havoc on our industry.

QUESTION:

- » I once gave a contribution, and nothing changed.

ANSWER: I went to the gym one time, and I still haven't gotten in shape. A contribution **doesn't guarantee we win, but doing nothing guarantees we lose. Whatever the problem, the REALTOR® Action Fund is there for you and your livelihood!**



SAMPLE OFFICE TO OFFICE CONTEST SCRIPT & TALKING POINTS

END of YOUR PRESENTATION:

Thank you for your time. And remember, we are conducting an Office to Office Contest. Each office that contributes the highest total voluntary REALTOR® Action Fund (RAF) contributions and/or has the highest percent of RAF contributors will be recognized with an award. Here's the flyer (pass out to the office).

Every dollar counts, your contribution does make a difference! Please make a contribution to RAF and protect our livelihood and business!

TALKING POINTS:

Did you know that the REALTOR® Action Fund (RAF) helps to protect private property rights, homeownership and YOUR business? How do we do it? The RAF raises money to help promote the values, attitudes, and beliefs of organized real estate, and every dollar is used to protect and advance REALTORS® interest in government.

FIGHTING	Costly and Time Consuming Point of Sale Bills!	PRESERVING	Dual Agency!
FIGHTING	Independent Contractor Withholding!	PRESERVING	Mortgage Interest Deduction!
FIGHTING	Statewide Service Taxes!		

By contributing \$20 to the REALTOR® Action Fund, you are part of the team that is helping to protect private property rights and creating the opportunity to help someone achieve the American Dream!

FOR MORE INFORMATION, CONTACT LISA EDWARDS:
916.492.5211 or lisae@car.org

raf.car.org



PLEDGE CARD

PROTECT YOUR LIVELIHOOD AND
FIGHT FOR HOMEOWNERSHIP

☒ **I PLEDGE TO GIVE!**

**REALTOR® ACTION FUND
VOLUNTARY CONTRIBUTION**

☐ **\$20** Introductory Level

☐ **\$49** "The Minimum Cost of Doing Business"

☐ **\$148** "The True Cost of Doing Business"

☐ Or become a C.A.R. Major Donor
(beginning at **\$449**) or an NAR Major Donor
(beginning at **\$1,000**)

NAME
(please print): _____ NRDS#: _____

PRIMARY ASSOCIATION: _____


PHONE NUMBER: _____

EMAIL: _____

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

Local AOR Logo


Local AOR
Street Address, City, State, ZIP
web address




IMAGINE YOUR CAREER IF...

- › Every time you got a new listing you had to tell the seller that they need to remove all wood burning fireplaces before the government will allow them to sell the house ... With the RAF, REALTORS® beat this proposal in several local counties, but we are constantly facing new point-of-sale proposals just like this.
- › Congress got rid of the Mortgage Interest Tax Deduction (MID), taking away the primary tax benefit of homeownership ... Tax reform is high on the agenda for the new Congress. We need RAF funds to save the MID!
- › The State of California required you to pay a service tax on every real estate transaction on top of your personal income tax ... It took RAF funds to beat this before and will take RAF funds to beat this proposal when it comes back.

**Without REALTOR® contributions,
there would be no REALTOR®
Action Fund, without the REALTOR®
Action Fund, proposals like these
and many more would become
law – hurting homeowners and
your bottom line!**



Fighting for our profession!



(916) 492-5211
raf.car.org



THE 1/3 RULE

Plan your fundraisers to make 3 times over the projected costs.

Fundraisers must be approved by C.A.R. staff before being promoted or taking place. Now, in addition and effective immediately—even for those already being planned or that have been approved – all associations must provide a budget reflecting estimated contributions and costs when submitting a fundraiser along with other required information related to the fundraiser.

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EXAMPLES:

Example 1

Association requests approval of a RAF fundraiser with an estimated cost of \$500 and projected contributions of \$1,600. This fundraiser would be approved since the projected funds raised are more than 3 times the projected costs.

Example 2

Association requests approval of a RAF fundraiser with an estimated cost of \$2,000 and projected contributions of \$4,500. This fundraiser would not be approved because it is not projected to bring in 3 times the costs. Either costs would have to be reduced, or the association would have to find a way to increase projected contributions to \$6,000, 3 times costs.



LOCAL FUNDRAISERS & EVENTS

NEW MEMBER ORIENTATION

The California Association of REALTORS® (C.A.R.), has prepared the following New Member Orientation materials to help educate your new members on the importance of REALTOR® Action Fund (RAF). All New Member Orientations must have one of the items that are marked with an * to be in compliance. You do not need all three, please choose the one that fits for your local Association.



The New Member Orientation materials can be found at:

raf.car.org

NEW MEMBER ORIENTATION VIDEO



This Video was designed specifically for new member orientation. C.A.R. created a short, but concise video that can be shared to explain the importance of REALTOR® Action Fund (RAF) and it provides a great opportunity when it is done to make the “ask” and provide some local issues that benefited from RAF funds.

*RAF PLEDGE CARDS FOR NEW MEMBER ORIENTATION DEPOSITS

NEW MEMBER ORIENTATION

☒ **I Pledge to Give!**

PROTECT YOUR LIVELIHOOD AND FIGHT FOR HOMEOWNERSHIP

REALTOR® ACTION FUND VOLUNTARY CONTRIBUTION

☐ \$20 Introductory Level

Please contribute \$20.00
REALTOR® Member
Orientation - Deposit of \$20
to the REALTOR Action Fund

Please initial here: _____

NAME
(please print): _____

NRDS#: _____ PHONE NUMBER: _____

SIGNATURE: _____ DATE: _____

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, as less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formula approved by C.A.R. for personal and corporate contributions. These PACs are: CRIPAC (supports state and local candidates), CRIPAC/Federal (supports federal candidates), and CRIC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC, which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

Local AOR Logo _____

Local AOR
Street Address, City, State, ZIP
web address _____

IMAGINE YOUR CAREER IF...

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- Congress got rid of the Mortgage Interest Tax Deduction (MID), taking away the primary tax benefit of homeownership ... Tax reform is high on the agenda for the new Congress. We need RAF funds to save the MID!
- The State of California required you to pay a service tax on every real estate transaction on top of your personal income tax ... It took RAF funds to beat this before and will take RAF funds to beat this proposal when it comes back.

Without REALTOR® contributions, there would be no REALTOR® Action Fund, without the REALTOR® Action Fund, proposals like these and many more would become law – hurting homeowners and your bottom line!

Fighting for our profession!


(916) 492-5211
raf.car.org

Many local associations ask for a “\$20 deposit” to reserve a spot to attend New Member Orientation. After you show the RAF Video, it the opportunity to ask the member if they would like their \$20 deposit to be used as their first RAF Contribution. If the member says yes, please have them complete this form. For more information on this, please contact C.A.R. staff, Lisa Edwards at lisae@car.org.



*RAF NEW MEMBER CONTRIBUTION FORM

Must include this form in all New Member Orientations to be in compliance. This form ensures that New Members are provided the proper disclosures.


NEW MEMBER ORIENTATION CONTRIBUTION	
CONTRIBUTOR INFORMATION	NAME (please print): _____
	NRDS #: _____ ASSOCIATION: _____ REGION: _____
	BILLING ADDRESS: _____
	CITY: _____ STATE: _____ ZIP: _____
	PHONE NUMBER: _____
	EMAIL: _____
COMMITMENT LEVEL	REALTOR® ACTION FUND VOLUNTARY CONTRIBUTION* <input type="radio"/> \$20 INTRODUCTORY LEVEL <input type="radio"/> \$49 "THE MINIMUM COST of DOING BUSINESS" <input type="radio"/> \$148 "THE TRUE COST of DOING BUSINESS"
	CALIFORNIA MAJOR DONOR VOLUNTARY CONTRIBUTION* <input type="radio"/> \$449 ANNUALLY  CALIFORNIA SILVER BEAR
PAYMENT & SUBMISSION	*Payment plan available for all levels (for specific details visit our website listed below) PAYMENT PLAN? <input type="radio"/> YES <input type="radio"/> NO
	PAYMENT METHOD: <input type="radio"/> VISA <input type="radio"/> MASTERCARD <input type="radio"/> AMERICAN EXPRESS <input type="radio"/> DISCOVER
	CREDIT CARD #: _____ EXP DATE: _____
	CARD TYPE: <input type="radio"/> PERSONAL <input type="radio"/> CORPORATE
FAX this completed form to 916.492.5290 or; ONLINE go to raf.car.org	
<small>Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, and the amounts above are only guidelines; you may give more, less or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs) according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates), CREPAC/Federal (supports federal candidates), and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.</small>	

REALTOR® ACTION FUND FUNDRAISING RECOGNITION LEVELS	
The California Association of REALTORS® recognizes and appreciates all levels of participation to the REALTOR® Action Fund. Below are the descriptions for C.A.R. and NAR participation levels.	
VOLUNTARY RAF FUNDRAISING RECOGNITION LEVELS Introductory Level \$20 Annual Contribution » RAF Button pin Minimum Cost of Doing Business: \$49 Annual Contribution » RAF Button pin True Cost of Doing Business: \$148 Annual Contribution » New RAF pin given upon initial contribution » New ribbon annually » Invitation to C.A.R.'s annual Capitol Reception in Sacramento » Widget to display proudly on website or signature	C.A.R.-MAJOR DONOR LEVELS California Silver Bear: \$449 Annual Contribution » New Silver Bear pin given upon initial contribution » New ribbon annually » Invitation to C.A.R.'s annual Capitol Reception in Sacramento » Invitation to Annual C.A.R. Major Donor Reception in the Fall » Widget to display proudly on website or signature

*RAF PLEDGE CARD

This pledge card does not ask for any type of credit card information, it is simply a "pledge card" for the new member to complete and then someone from the local association will follow up to collect the funds.

PROTECT YOUR LIVELIHOOD AND FIGHT FOR HOMEOWNERSHIP	
<input checked="" type="checkbox"/> I PLEDGE TO GIVE!	
REALTOR® ACTION FUND VOLUNTARY CONTRIBUTION <input type="radio"/> \$20 Introductory Level <input type="radio"/> \$49 "The Minimum Cost of Doing Business" <input type="radio"/> \$148 "The True Cost of Doing Business" <input type="radio"/> Or become a C.A.R. Major Donor (beginning at \$449) or an NAR Major Donor (beginning at \$1,000)	NAME (please print): _____ NRDS: _____ PRIMARY ASSOCIATION: _____ PHONE NUMBER: _____ EMAIL: _____
<small>Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, less or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs) according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates), CREPAC/Federal (supports federal candidates), and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.</small>	
Local AOR Logo	Local AOR Street Address, City, State, ZIP web address

IMAGINE YOUR CAREER IF...	
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Without REALTOR® contributions, there would be no REALTOR® Action Fund, without the REALTOR® Action Fund, proposals like these and many more would become law – hurting homeowners and your bottom line!	REALTOR ACTION FUND Fighting for our profession!
REALTOR ACTION FUND (916) 492-5211 raf.car.org	



LOCAL FUNDRAISERS & EVENTS

OFFICE TO OFFICE CONTEST

Challenge your offices to compete against one another in a race to see which office can raise the most voluntary contributions for the REALTOR® Action Fund. Create 4-5 contest brackets to evenly distribute offices by member count. The winning office of each bracket should be awarded with a prize of your choosing.



Examples of the flyer can be found at:
raf.car.org.



**All fundraising activities and flyers
MUST BE approved by C.A.R.!**

Contact Lisa at LisaE@car.org.

NOTE: When you are offering a prize or something of "\$\$ value" then you need the "rules" – see Pasadena-Foothills AOR example.

If you are offering just a plaque for recognition then you would just need the contribution form with the PAC Disclosures – see Placer County example.

Full examples available on raf.car.org.

STEP 1: Meet with your RAF Team to determine the categories that apply to your local Association

STEP 2: Determine the prize for the winners in each category:

- a. Plaque for the Winning Offices
- b. Catered Breakfast or Lunch

STEP 3: Complete and submitted the Office to Office Contest Application and Budget Worksheet (if applicable) with logo to C.A.R.

STEP 4: C.A.R. to create flyer and rules, if applicable

STEP 5: Meet with RAF Team to pull AI360 Office to Office Report

View Office
to Office
template on
raf.car.org



OFFICE TO OFFICE SAMPLE FLYERS

OFFICE to OFFICE CONTEST!
Pasadena-Foothills Association of REALTORS®
BATTLE ROYALE

Each office that has the highest percentage of voluntary contributions to the REALTOR® Action Fund (RAF), within their specified categories, will win a custom office plaque and gift basket.

To be eligible to win, all REALTOR® Action Fund contributions of \$20 or more must be received by **July 31, 2018**.

FIGHT FOR YOUR PROFESSION

WILL YOUR OFFICE COME OUT ON TOP?

See official rules, odds and other details on the back →

HELP PROTECT YOUR LIVELIHOOD

Contest will be based on the office agent count:

Small	1-25 Agents
Medium	26-50 Agents
Large	51+ Agents

What's at stake:

- Pasadena Occupancy Inspections,
- Rent Control (Pasadena & Glendale),
- Costa-Hawkins – Just to name a few

**THESE WILL AFFECT YOUR BOTTOM LINE
HELP US HELP YOU!**

CONTRIBUTE TODAY!

**ALL RAF CONTRIBUTIONS
MADE ARE APPLIED TO YEARLY
AND LIFETIME BALANCES!**

REALTOR ACTION FUND
Fighting For Our Profession

(916) 492-5211
<http://raf.car.org>

For questions please contact:
PFAR COMMUNICATIONS
626.795.2455
info@pfar.org

**PASADENA-FOOTHILLS
ASSOCIATION OF REALTORS®**

OFFICE to OFFICE CONTEST!
HELP PROTECT YOUR LIVELIHOOD

Each office that has the highest percentage of REALTOR® Action Fund (RAF) contributors will receive special recognition at the Summer RAF BBQ with a Certificate of Achievement. To be eligible to win, all REALTOR® Action Fund contributions must be received by **June 30, 2016**.

For more details, please contact:
KAT MATLOCK
(909) 866-5891
or
SYLVIA SHALMI
(909) 856-2804

FIGHT FOR YOUR PROFESSION

Win!

Contest will be based on the office agent count:

SM	1-10 agents
MED	11-20 agents
LG	21-40 agents
XL	41+ agents

FOR QUESTIONS, PLEASE CONTACT:

KAT MATLOCK
Association Executive
(909) 866-5891
bigbearaor@gmail.com

SYLVIA SHALMI
Past President (2016)
(909) 856-2804
bigbearshalmi@kw.com

REALTOR ACTION FUND
Fighting For Our Profession

(916) 492-5211
raf.car.org

**PASADENA-FOOTHILLS
ASSOCIATION OF REALTORS®, Inc.**



OFFICE TO OFFICE CONTEST APPLICATION

REALTOR® Action Fund

OFFICE TO OFFICE OR COMMITTEE VS. COMMITTEE CONTEST APPLICATION



PAC FUNDRAISER POLICY Plan your fundraisers to make 3 times over the projected costs.

Fundraisers must be approved by C.A.R. staff before being promoted or taking place. Now, in addition and effective immediately—even for those already being planned or that have been approved—all associations must provide a budget reflecting estimated contributions and costs when submitting a fundraiser along with other required information related to the fundraiser.

A fundraiser will not be approved unless the projected funds raised are at least 3 times the projected costs. Additionally, if an approved fundraiser does not meet the 1/3 rule, which means the costs of the event or sweepstakes exceeded the contributions raised, then all contributions will be returned to the contributors and the AOR will not be reimbursed for the expenses of the event. If funds are returned to the local association for not meeting these fundraising requirements, the AOR and contributors will not receive participation credit.

Examples:

1. Association requests approval of a RAF fundraiser with an estimated cost of \$500 and projected contributions of \$1,600. This fundraiser would be approved since the projected funds raised are more than 3 times the projected costs.

2. Association requests approval of a RAF fundraiser with an estimated cost of \$2,000 and projected contributions of \$4,500. This fundraiser would not be approved because it is not projected to bring in 3 times the costs. Either costs would have to be reduced, or the association would have to find a way to increase projected contributions to \$6,000, 3 times costs.

If you have any questions, please contact Lisa Edwards at 916-492-5211 or lisae@car.org.

The information on this application will be used to complete a distribution flyer for your association to use to promote the contest. Some local AORs want to promote some friendly competition among between local committees. Please fill out this application completely.

Today's Date			
Local Association			
AOR Street Address			
City			
State	CA	Zip Code	

CONTACT INFORMATION

Full Name			
AOR Title			
Phone			
Email			

CONTEST INFORMATION

Start Date		End Date	
Description of award or prize given to winning office or committee, including cost:			

Page 1 of 2

OFFICE TO OFFICE BUDGET WORKSHEET

REALTOR® Action Fund

BUDGET WORKSHEET OFFICE TO OFFICE



Association Name			
Contact Person		Phone Number	
Email			

OFFICE TO OFFICE CATERING PRIZES

Event Costs	\$ Amount		
Food			
Liquor			
AV			
Photography			
Invitations			
Postage			
Name Tags/Ribbons			
Catering Equipment			
Sales Tax			
Room Cost			
Decorations (i.e. Paper plates, napkins, etc.)		Projected RAF Contributions	
Misc.		3x Rule	
Estimated Grand Total		x 3	=

RAF OFFICE TO OFFICE PRIZES FOR WINNERS

Name of Prize(s)	Cost of Prize	3x Rule	Estimated Total Costs	Projected RAF Contributions

To calculate the 3 times rule: take the total costs of the prize or the grand total of the event costs and 3x. Example: \$1000 x 3 = \$3000



Download application and budget worksheet at raf.car.org.



Remember the 1/3 rule applies to all fundraisers



LOCAL FUNDRAISERS AND EVENTS

SWEEPSTAKES FUNDRAISERS

Members have an opportunity to win a prize in exchange for their contribution. The RAF Team should decide what type of prize will be given to the winner(s); common prizes include an iPad, Gift Card(s) and Apple Watches, Fitbits. Once the prize is chosen, the RAF Team should decide on a pricing structure, start and end dates and the date the winner(s) will be drawn.

C.A.R. has templates for your local Association to use. Once the RAF Team has made their decision on the type of prize(s). Please follow these steps for a successful sweepstake fundraiser:

STEP 1: Complete Sweepstakes Application.

STEP 2: Complete Budget Worksheet.

STEP 3: Submit completed Sweepstakes Application and Budget Worksheet to C.A.R. with your logo.

STEP 4: C.A.R. will create your distribution flyer and the appropriate rules.

STEP 5: Promote your Sweepstakes by:

- Putting it in your local Association Newsletters
- Email the flyer to your members
- The RAF Team promote through Office to Office visits
- Add something to your email signature during contest month.



All fundraising activities and flyers MUST BE approved by C.A.R.!

Contact Lisa at LisaE@car.org.



Remember the 1/3 rule applies to all fundraisers

View samples on raf.car.org



SWEEPSTAKES GIFT CARDS

REALTOR® ACTION FUND SWEEPSTAKES
— HELP PROTECT —
YOUR LIVELIHOOD

Win a \$250 Harvest Market Gift Card

THE MORE YOU DONATE THE MORE OPPORTUNITY TO WIN!

Enter the REALTOR® Action Fund Sweepstakes

See official rules, odds and other details on the back →

ALL RAF CONTRIBUTIONS MADE ARE APPLIED TO YEARLY AND LIFETIME BALANCES!

REALTOR ACTION FUND
Fighting for our profession!

FOR MORE INFORMATION, CONTACT:
LESJI LANGSLET, AE
Phone: 707-964-7008
Email: CMAR@mcn.org

CMAR
Coastal Mendocino Association of Realtors®

12

SWEEPSTAKES GIFT CARDS

REALTOR® ACTION FUND SWEEPSTAKES
— HELP PROTECT —
YOUR LIVELIHOOD

Win a \$400 Costco Gift Card

Enter the REALTOR® Action Fund Sweepstakes

See official rules, odds and other details on the back →

ALL RAF CONTRIBUTIONS MADE ARE APPLIED TO YEARLY AND LIFETIME BALANCES!

REALTOR ACTION FUND
Fighting for our profession!

FOR MORE INFORMATION, CONTACT:
JESSE PAYNE
Executive Officer
(707) 644-5525
jpayne@saor.org

SOLANO ASSOCIATION of REALTORS®


11



SWEEPSTAKES FUNDRAISER APPLICATION

REALTOR® Action Fund

SWEEPSTAKES APPLICATION



PAC FUNDRAISER POLICY
Plan your fundraisers to make 3 times over the projected costs.

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Examples:

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If you have any questions, please contact Lisa Edwards at 916-492-5211 or lisae@car.org.

The information on this application will be used to complete a distribution flyer for your association to use to promote sweepstakes. Please fill out this application completely.

Today's Date			
Local Association			
AOR Street Address			
City			
State	CA	Zip Code	

CONTACT INFORMATION	
Full Name	
AOR Title	
Phone	
Email	


SWEEPSTAKES INFORMATION			
Start Date		End Date	
Date of Drawing		Time of Drawing	
Address / Location / Event Name Where Drawing Will Be Held:			

Page 1 of 2

SWEEPSTAKES BUDGET WORKSHEET

REALTOR® Action Fund

**BUDGET WORKSHEET
SWEEPSTAKES AND IN-PERSON EVENTS**



Association Name			
Contact Person		Phone Number	
Email			

IN-PERSON EVENTS			
Event Costs	\$ Amount		
Food			
Liquor			
AV			
Photography			
Invitations			
Postage			
Name Tags/Ribbons			
Catering Equipment			
Sales Tax			
Room Cost		Projected RAF Contributions	
Decorations (i.e. Paper plates, napkins, etc.)			
Misc.		3x Rule	
Estimated Grand Total		x 3	=

RAF SWEEPSTAKES				
Name of Prize(s)	Cost of Prize	3x Rule	Estimated Total Costs	Projected RAF Contributions

To calculate the 3 times rule: take the total costs of the prize or the grand total of the event costs and 3x. Example: \$1000 x 3 = \$3000



Download application and budget worksheet at raf.car.org.



Remember the 1/3 rule applies to all fundraisers



LOCAL FUNDRAISERS & EVENTS

IN-PERSON FUNDRAISER

The purpose of an in-person event is to invite non-contributing members to a special event that supports voluntary contributors to RAF.

The RAF Team decides on a theme, time and location that your members will favor. See below for a few options:

- » Meet & Greet with a Keynote Speaker
- » Wine & Cheese Reception/Mixer
- » Barbecue Luncheon

Once the RAF Team's decision is made, please follow these steps to complete the process.

STEP 1: Complete the RAF In-Person application.

STEP 2: Complete Budget Worksheet.

STEP 3: Submit completed application and worksheet with logo to C.A.R.

STEP 4: C.A.R. will create your distribution flyer.

STEP 5: Pull your "target" non-contributor list from AI360.

IN-PERSON EVENT APPLICATION AND BUDGET WORKSHEET

REALTOR® Action Fund
IN-PERSON EVENT APPLICATION

PAC FUNDRAISER POLICY
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If you have any questions, please contact Lisa Edwards at 916-492-5211 or lsew@car.org.

The information on this application will be used to complete a distribution flyer for your association to use to promote the event. Please fill out this application completely.

Today's Date			
Local Association			
AOR Street Address			
City			
State	CA	Zip Code	

CONTACT INFORMATION
Please note, this contact information will appear on the flyer as stated below.

Full Name			
AOR Title			
Phone			
Email			

EVENT INFORMATION

Event Date		Start Time		End Time	
Location / Address of Event					
Directions to RSVP (e.g. website link, call office, etc.):					

Page 1 of 2



Download application and budget worksheet at raf.car.org.



Remember the 1/3 rule applies to all fundraisers

REALTOR® Action Fund
BUDGET WORKSHEET
SWEEPSTAKES AND IN-PERSON EVENTS

Association Name

Contact Person

Phone Number

Email

IN-PERSON EVENTS

Event Costs	\$ Amount
Food	
Liquor	
AV	
Photography	
Invitations	
Postage	
Name Tags/Ribbons	
Catering Equipment	
Sales Tax	
Room Cost	
Decorations (i.e. Paper plates, napkins, etc.)	
Misc.	
Estimated Grand Total	

Projected RAF Contributions

3x Rule

RAF SWEEPSTAKES

Name of Prize(s)	Cost of Prize	3x Rule	Estimated Total Costs	Projected RAF Contributions

To calculate the 3 times rule: take the total costs of the prize or the grand total of the event costs and 3x. Example: \$1000 x 3 = \$3000



SAMPLE IN-PERSON EVENT FLYERS

REALTOR® ACTION FUND

RECOGNITION RECEPTION

Please Join Us

Wednesday, May 25, 2019
from 4-6 p.m.

Bella Vino's Wine Room at Distio's
783 Market Ave, Morro Bay, CA

Cost: \$20 RAF Contribution
Free For Contributors Of
\$148 OR MORE.

RSVP by: Monday, May 23, 2019



19



FOR MORE INFORMATION, CONTACT:

LISA GILBERT
Association Executive
805-772-4405
scenicdiso@gmail.com

*OPEN TO REALTOR® MEMBERS ONLY

20



REALTOR ACTION FUND
Fighting for our profession!

20

YOU MUST REGISTER IN ADVANCE TO RESERVE YOUR TIME SLOT, PLEASE CONTACT:

DEBRA
Debra@rfaa.com
818-947-2265

PROFESSIONAL HEADSHOTS

BY BROOKE RITTER



PHOTOGRAPHER:
BROOKE RITTER
brookeritterphotography.com

\$20 RAF CONTRIBUTION:
1 Headshot

\$49 RAF CONTRIBUTION:
3 Poses

(Professional Photo, Social Media Photo, Personal Photo, etc.)

Snacks and beverages will be provided.

Digital image(s) emailed to contributor.

FRIDAY, SEPTEMBER 28, 2018
10AM - 1PM

20655 Soledad Canyon Rd #34
Canyon Country, CA 91351

REALTOR ACTION FUND
Fighting for our profession!

REALTOR ACTION FUND
Fighting for our profession!

(916) 492-5211
raf.car.org

REALTOR® ACTION FUND

YPN ST. PATRICK'S DAY MIXER

23



THURSDAY, MARCH 15, 2018 | 4:00 - 8:00 p.m.

Limerick Tavern
300 West Main Street #110, Alhambra, CA

COST: \$20 RAF CONTRIBUTION
Open to REALTOR® Members Only

Costly and Time Consuming Point of Sale Bill!
Independent Contractor Withholding!
Statewide Service Taxes!
Dual Agency!
Mortgage Interest Deduction!

ALL RAF CONTRIBUTIONS made are applied to yearly and lifetime balances!

FOR MORE INFORMATION, CONTACT:

Albert Tran
Executive Office
(626) 288-6212
albert@wsgvar.com

REALTOR ACTION FUND
Fighting for our profession!

raf.car.org

View
samples on
raf.car.org





EMAIL FUNDRAISING CAMPAIGN STRATEGIES

EMAIL CAMPAIGN

An effective way to inform and educate members about the importance of RAF, email campaigns take very little effort to administer and can have a greater reach in a short amount of time. Send emails with direct messages that target specific members: non-contributors ask for \$20 contribution or members that have contributed in the past, etc.

STEP 1: Determine what type of email campaign you want to do?

- On a current issue that you need their help with
- Just a simple ask from the Board President
- An update on what is going on at the local level
- A Year-end thank you to your contributors
- A welcome to the New Year Email campaign

STEP 2: Determine your target audience?

- Non-Contributors
- Contributors who paid the previous year, but not in the current year.

STEP 3: Contact C.A.R. Staff and in conjunction with AI360 staff will work on helping you create your email campaign and sending it out to member target list.

EMAIL CAMPAIGN: NON CONTRIBUTOR



Dear <<#ind_FirstName#>>,

Now is the time to act. The National Association of REALTORS® and the California Association of REALTORS® are focused on promoting and protecting the real estate industry at the federal level. Issues that impact the real estate industry will be at the forefront this legislative session including:

- Regulatory Reform
- Health Care Reform
- Tax Reform
- Flood Insurance
- Secondary Mortgage Market Reform

That's where the REALTOR® Action Fund – RAF – comes in. RAF helps make the voice of our members heard from Washington, D.C. and our state and local communities. RAF is only made possible by members who participate in protecting the future of our industry. **RAF is not membership dues. It is voluntary contributions from members who know that protecting the real estate industry is important to all of us!**

Join me and other REALTORS® who know that RAF is how we make our voice heard. We need YOU. So take just a minute to protect the future of our industry by clicking [HERE](#).

Thank you in advance,

Your C.A.R. President

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

REALTOR® Action Fund is published by the CALIFORNIA ASSOCIATION OF REALTORS®, a trade association representing more than 160,000 REALTORS® statewide.

[C.A.R.'s Privacy Policy](#) - [Contact C.A.R.](#)



EMAIL CAMPAIGN: MEMBERS



Dear <<#ind_FirstName#>>,

With 2017 under way, changes have already taken place under the new Congress and Administration. The National Association of REALTORS® (NAR) and the California Association of REALTORS® (C.A.R.) are focused on the issues at the federal level that affect members and our industry. Issues that could impact the real estate industry will be at the forefront this legislative session including:

- Regulatory Reform
- Health Care Reform
- Tax Reform
- Flood Insurance
- Secondary Mortgage Market Reform

At all levels of government our association will be fighting for you, we've got your back. We are focused on promoting and protecting the real estate industry not just at the federal level but also at the state and local level too. That's where the REALTOR® Action Fund – RAF – comes in. **RAF helps make the voice of our members heard in Washington and across the country in our local communities.**

RAF is only as strong as the members who contribute in it. **RAF is not membership dues but voluntary contributions from members like you and me.** So take just a minute to protect the future of our industry by clicking [HERE](#).

Thank you in advance,

Your C.A.R. President

Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, but you may give more, or less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.). Contributions will be allocated among three of C.A.R.'s political action committees (PACs), according to different formulas approved by C.A.R. for personal and corporate contributions. These PACs are: CREPAC (supports state and local candidates); CREPAC/Federal (supports federal candidates); and CREIEC (makes independent expenditures in support of or opposition to candidates). C.A.R. also sponsors IMPAC which supports local and state ballot measures and other issues that impact real property in California. The allocation formula may change including re-designating a portion to IMPAC.

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[C.A.R.'s Privacy Policy](#) - [Contact C.A.R.](#)



**For additional email
templates, contact C.A.R.
Staff: LisaE@car.org**



OTHER FUNDRAISING CAMPAIGN STRATEGIES

PHONE BANKING CAMPAIGN

When surveyed, members claim that they did not contribute because they had never been asked! A direct ask is tougher to refuse than any other form of fundraising solicitation and has the highest success rate! Phone Banking allows for immediate member contact, providing a greater opportunity to secure a voluntary contribution.

Phone Banks can be a fun activity. The RAF team decides on a date, time and goals for this activity. Once the details are finalized, fill out a phone bank application. We suggest adding a phone bank around your DBS cycle to remind members to pay their dues.

TIP:
Be sure to
give your local
Association and the
Phone Bank Team
enough time to be fully
prepared for the
Phone Bank.

BEST PRACTICES

1. Decorate the room, have noise-makers, provide giveaways and prizes to your volunteers.
 2. If possible, have computers set up in advance so your volunteers can sit down at a work station
 3. Computers with a mouse are more user-friendly than tablets
 4. Headsets are handy so volunteers can type with both hands
 5. Set business rules in advance-
 - a. How will you deal with leaving a voicemail?
 - b. Where should checks be sent?
 6. Center your event around a meal
 7. Post results as you go!
 8. Ideal time schedule:
 - h. Start – 30 minutes Volunteers arrive (no later than this time), log in, orientation & training
 - i. 2-3 hours Calling begins!
 - j. Finish Meal and celebration
 9. Provide:
 - h. Power strips at table
 - i. Extra cell phone chargers
 - j. Pen & paper at each work station
 10. Have extra staff/volunteers available to answer questions and offer situational advice during the phone bank.
 11. Set up a friendly competition between volunteers/volunteer teams
 12. Please be sure to send a follow-up email to all those members that contributed during the Phone Bank
-



BUSINESS CHOICES

Post answers to these business choices on a white board or screen so volunteers can always see the answers:

1. How will you handle leaving messages?
 - a. Will you leave a voicemail? What number should the volunteer give?
Note, if volunteers are calling on their cell phones, many times members call back on the volunteer's cell phones because that is what is saved.
 - b. What action should the volunteer take?
 - i. Volunteer clicks "No Answer" leave note and the target will reappear in the queue in 30 minutes to be called again (or available to be looked up if the target calls back).
 - ii. Volunteer clicks "Send Email" and personalizes the email. Note, if the target calls the volunteer back, the member's record in the phone bank cannot be recalled. Volunteers should tell the member that he/she already received an email, and can walk the member through the contribution process
2. How will you collect checks if a member doesn't want to pay by credit card?



APPROVED TWEETS TO PROMOTE PHONE BANK

- » Our REALTORS® are manning the phones today, reaching out to colleagues, and promoting RAF. You might just hear from us! #Realtors4RAF
- » The REALTOR® Action Fund (RAF) helps to protect private property rights, homeownership, and YOUR business (insert the link to your webpage)
- » Follow our link to find out more on what RAF does for you (insert the link to your webpage) #Realtors4RAF
- » Show off your support & involvement today with our hashtag #Realtors4RAF
- » Thank you to all our volunteers and contributors today. Every dollar is used to protect & advance REALTORS® interest in government.



OTHER FUNDRAISING CAMPAIGN STRATEGIES

PHONE BANK APPLICATION

PHONE BANK BUDGET WORKSHEET

REALTOR® Action Fund
PHONE BANK APPLICATION

The information on this application will be used to complete a distribution flyer for your association to use to promote the event. Please fill out this application completely.

PAC FUNDRAISER POLICY
Plan your fundraisers to make 3 times over the projected costs. Fundraisers must be approved by C.A.R. staff before being promoted or taking place. Now, in addition and effective immediately—even for those already being planned—that have been approved—all associations must provide a budget reflecting estimated contributions and costs when submitting a fundraiser along with other required information related to the fundraiser. A fundraiser will not be approved unless the projected funds raised are at least 3 times the projected costs. Additionally, if an approved fundraiser does not meet the 1/3 rule, which means the costs of the event or sweepstakes exceeded the contributions raised, then all contributions will be returned to the contributors and the AOR will not be reimbursed for the expenses of the event. If funds are returned to the local association for not meeting these fundraising requirements, the AOR and contributors will not receive participation credit.

Examples:
1. Association requests approval of a RAFF fundraiser with an estimated cost of \$500 and projected contributions of \$1,600. This fundraiser would be approved since the projected funds raised are more than 3 times the projected costs.
2. Association requests approval of a RAFF fundraiser with an estimated cost of \$2,000 and projected contributions of \$4,500. This fundraiser would not be approved because it is not projected to bring in 3 times the costs. Either costs would have to be reduced, or the association would have to find a way to increase projected contributions to \$6,000, 3 times costs. If you have any questions, please contact Lisa Edwards at 916-492-5211 or lisae@car.org.

CONTACT INFORMATION
Please note, this contact information will appear on the flyer as stated below.

PHONE BANK INFORMATION

Today's Date
Local Association
AOR Street Address
City
State CA Zip Code

Full Name
AOR Title
Phone
Email

Start Date
End Date
What is Your Fundraising Goal?
Who are your Target Contributors?
Location / Address of Event

Page 1 of 2

REALTOR® Action Fund
BUDGET WORKSHEET
PHONE BANK EVENTS

Association Name
Contact Person
Phone Number
Email

PHONE BANK EVENTS

Event Costs	\$ Amount
Food	
Liquor	
AV	
Photography	
Invitations	
Postage	
Name Tags/Ribbons	
Catering Equipment	
Sales Tax	
Room Cost	
Decorations (e.g., Paper plates, napkins, etc.)	
Misc.	
Estimated Grand Total	x 3 =

RAF PHONE BANK PRIZES FOR VOLUNTEERS

Name of Prize(s)	Cost of Prize	3x Rule	Estimated Total Costs	Projected RAF Contributions

To calculate the 3 times rule: take the total costs of the prize or the grand total of the event costs and 3x. Example: \$1000 x 3 = \$3000

Page 3 of 3

PHONE BANK GUIDELINES

PHONE BANK SCRIPT

GUIDELINES FOR RAF TELEPHONE SOLICITATION

Thank you for participating in this phone bank to request contributions for 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 ensure each call is effective, pleasant, and a rewarding experience for both you and the member you are calling. Please review the guidelines and be sure to follow them when making calls to members.

- USE BUSINESS PHONE NUMBERS ONLY.** Calls must be made only 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.
- CALL HOURS.** Call members between the hours of 8:00 a.m. to 8:00 p.m. Do not call members prior to 8 a.m. or after 8 p.m. (local time at the member's location). Do not disconnect an unanswered call before at least 15 seconds or 4 rings.
- IDENTIFY YOURSELF AND THE PURPOSE OF THE CALL.** State your name and why your calling. "I'm calling on behalf of C.A.R.'s REALTOR® Action Fund to request a contribution to RAF", and provide the member with C.A.R.'s phone number (916) 492-5211 for any future questions.
- BE COURTEOUS AND FRIENDLY.** 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 a contribution to RAF.
- BE KNOWLEDGEABLE.** Be prepared to answer basic questions about the REALTOR® Action Fund, the contribution levels, and the benefits attached to those levels. 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 a contribution. If you cannot answer a member's question, inform the member that you will call them back with the answer; or if the member desires, he or she may speak with Lisa Edwards directly at (916) 492-5211.
- THREATS, INTIMIDATING LANGUAGE.** Do not use threats, intimidation, or profane/obscene language during any call. Do not make repeated calls in an attempt to annoy, abuse, or harass the member.
- FALSE OR MISLEADING STATEMENTS.** Do not make any false or misleading statements about the nature of contributions to the REALTOR® Action Fund, including (i) any statement that contributions to the REALTOR® Action Fund are required, rather than voluntary (contributions to the REALTOR® Action Fund are voluntary and are not required as a condition of C.A.R.'s membership); (ii) the purpose of requesting the contribution; (iii) the tax-deductible nature of the contribution (contributions to the REALTOR® Action Fund are not tax-deductible); or (iv) how the contribution will be used.
- 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.
- CALLER ID.** Use 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.
- MEMBER "DO NOT CALL" REQUESTS.** If a member makes a request not to be called, provide the member's name and phone number immediately to Lisa Edwards at (916) 492-5211. Do not make any further calls to this member.

C.A.R. is committed to providing excellent customer service to our members. Remember, 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 Lisa Edwards at (916) 492-5211.

raf.car.org

RAF PHONE BANKING RULES & SCRIPT

Thank you for requesting contributions to the REALTOR® Action Fund on behalf of C.A.R. The following telephone script should be used when requesting contributions from C.A.R. members. Phone banking costs must be kept under \$499.99. If more than \$499.99, then the reimbursement is processed differently.

- PHONE BANKING RULES**
 - All Phone banking MUST be conducted at a Local Association of REALTORS® (AOR) office.
 - If the member is unavailable, you may leave the following message: "Hi, ____ This is ____ from the ____ Local AOR, there is no need to call me back, I will be sending you an email as a follow-up to this call."
 - The following disclosure MUST BE READ every time.
*Political contributions are not tax deductible as charitable contributions for federal and state income tax purposes. Contributions to the REALTOR® Action Fund are voluntary, and the amounts suggested are only guidelines you may give more, less, or nothing at all. Failure to contribute will not affect an individual's membership status in the California Association of REALTORS® (C.A.R.)." then continue with the script.
 - If a member hangs up as you are reading them the disclosure, you do not need to call them back.
- PHONE BANKING SCRIPT:**

Hello, my name is _____ and I am a fellow REALTOR® May I speak with ("member's name")? I would like to speak to you about the importance of the REALTOR® Action Fund (RAF)

Did you know that the REALTOR® Action Fund helps to protect private property rights, homeownership, and YOUR business? How do we do it? The REALTOR® Action Fund raises money to help promote the values, attitudes, and beliefs of organized real estate, and every dollar is used to protect and advance REALTORS® interest in government. Just on the State level, an economic analysis shows that C.A.R. lobbying and legislative activities SAVED agents on average \$9,313 and firms \$11,601 last year.

We were able to make a difference in the following areas important to the interests of Real Estate professionals:

 - Defeating an attempt by Congress to fund the nation's highway system through increased fees (guarantee-fees, aka g-fees) on homebuyers.
 - Fighting a service tax proposal that would adversely affect housing affordability by imposing a tax on real estate transaction services.
 - Fighting point of sale mandates that would increase the cost of housing, preventing many prospective homebuyers from entering the housing market.

By contributing \$20 to the REALTOR® Action fund, you are part of the team that is helping to protect private property rights thru C.A.R.'s lobbying efforts and creating the opportunity to help someone achieve the American Dream!

raf.car.org

To
download
the full
kit, go to
raf.car.org



NOTES



APPRECIATION & RECOGNITION

BUILD RECOGNITION INTO YOUR FUNDRAISING STRATEGY

Studies show that thanking contributors helps maintain their involvement and may also help elevate them to a higher level of participation. Here are some ways to show members that their voluntary contribution and participation is appreciated.

TOKENS OF APPRECIATION

Award contributors with a "Certificate of Appreciation" at your association's general meeting, designate a "Contributor-of-the-Month" parking spot or provide special seating at association events.

YEAR-END EMAIL

Have your association president send a thank you email to all contributors.

NEW YEAR / WELCOME EMAIL

Have your association president send a welcome to the new year and also thank all the contributing members to RAF.

PUBLIC RECOGNITION

Create a "Thank You" list of contributors to be published in a local newsletter, on the association website or on a "Contributor Recognition Wall" at your office.

APPRECIATION EVENT

Invite contributors to a special recognition event with association leadership, industry experts and/or a celebrity guest as special guests. This is a perfect time to have a pinning ceremony and award Major Investors with their C.A.R. RAF pins.

MAJOR INVESTOR EMAIL

Have your local association president send a thank you email to your new Major Investors of \$449 and above and copy the rest of your board members. All of your association's leadership should respond with positive recognition.

MAJOR INVESTOR EMAIL SAMPLE



Dear <<#ind_FirstName#>>,

On behalf of the Insert Local Name Association of REALTORS®, the Local AOR leadership wants to thank you for your generous support of C.A.R.'s Political Programs. [Optional: If you want add that their name will be announced at the next local AOR meeting].

With your generous investment, the REALTOR® profession will be further protected by providing the necessary funds to: support NAR's, C.A.R.'s and the local's Legislative agenda; issues important to our industry; and candidates, from both parties, who share REALTORS® concerns about these issues.

We hope that you will continue to stay involved in the REALTOR® Party by VOTING for REALTOR®-friendly candidates, ACTING on behalf of REALTOR® issues and CONTRIBUTING TO REALTOR® Action Fund.

We appreciate your commitment to organized real estate and support of the Political Programs.

Sincerely,

President's Name
Year, President of Local AOR

THANK YOU CERTIFICATE SAMPLE





CONTRIBUTOR RECOGNITION

RAF Recognition Event(s) and/or Commemorative Award(s) by a local Association either individually or collectively, shall not exceed 10% of the RAF amount raised by the local Association in the preceding calendar year.

Download
Policies and
Applications
on raf.car.org

PAC RECOGNITION POLICY



PAC RECOGNITION POLICY

BACKGROUND

In accordance with the California Fair Political Practices Commission mandates, costs associated with RAF Recognition Events (e.g., lunches, receptions, etc.) are treated as solicitation costs. As a result, C.A.R.'s four political action committees (CREPAC, CREPAC/Federal, CREPAC (LCRC) and IMPAC (local IMPAC)) collectively, the "PACs," are responsible for covering or reimbursing costs associated with organizing such RAF Recognition Events in proportion with the allocation determined by C.A.R.'s counsel. This means that a portion of the costs must be borne by CREPAC/Federal and CREPAC. Therefore, it is within the purview of PAC leadership to review and approve any updates that impact C.A.R. policies regarding these events.

RESOLUTION

Adopted 1/15/2018 the approval and reimbursement of RAF Recognition Events as follows:

1. RAF Recognition Events held by a local Association either individually or collectively, shall not exceed 10% of the RAF amount raised by the local Association in the preceding calendar year. This policy applies to all RAF Recognition Events even if there are sufficient local IMPAC or LCRC funds to cover the costs, since the costs must come proportionally from the respective PACs to which the RAF contributions were deposited.
2. If the projected costs of an RAF Recognition Event are anticipated to exceed 10% of the RAF amount raised by the local Association in the preceding calendar year, the local Association will not receive approval and cannot hold the RAF Recognition Event.
3. **All costs must be approved in advance by C.A.R. staff for all RAF Recognition Events.** Approved costs will be allocated to and reimbursed from each of the C.A.R.-affiliated PACs as required by law. The portion allocated to CREPAC and IMPAC will be reimbursed from local allocations in those PACs (i.e., LCRC and local IMPAC funds). The portion allocated to CREPAC/Federal and CREPAC will be borne by those PACs.
4. If a local Association holds an RAF Recognition Event that was not approved, either because it was not submitted for approval or because the costs exceed the thresholds set forth in this policy, the costs must be reimbursed from the PACs by the normal allocation. Therefore, for such non-approved events:
 - a. The CREPAC Trustees shall be notified each time a local Association holds an event without approval and may take further action, if they choose.
 - b. The portion of costs allocated to CREPAC and IMPAC will be reimbursed from local allocations in those PACs, as provided above, and
 - c. The portion of costs allocated to CREPAC/Federal and CREPAC will be reimbursed by those PACs in accordance with law, but the Association will forfeit an equal amount from their local CREPAC and IMPAC allocation to the non-local allocations in those PACs. The precise ratio of the forfeit will be determined by C.A.R. staff, and may take into consideration the available local allocation amounts, legal requirements or any other factor. If there are not sufficient local allocations in those PACs at the time of reimbursement, the local Association will be required to allocate funds to those PACs until the required forfeiture is met.
- d. RAF Staff will provide an activity report to CREPAC staff for the Full Business meetings each year, so that the CREPAC Trustees may have a summary report of recognition events held for that year.

NOTE: RAF Recognition/Reception Events at which contributions are requested are treated as fundraisers and are subject to fundraiser rules and policies.

Examples and Restrictions →

raf.car.org



PAC RECOGNITION POLICY

RAF RECOGNITION POLICY EXAMPLES

EXAMPLE #1: PETITE CATEGORY

A local association raised a total \$4,088 in RAF contributions for 2017. 10% or \$409 are available to use towards a recognition event(s), or a commemorative award(s) at the local association discretion. Bottom line... cannot exceed \$409.

EXAMPLE #2: LARGE CATEGORY

A local association raised a total of \$80,197 in RAF contributions for 2017. 10% or \$8,020 are available to use towards a recognition event(s), or a commemorative award(s) at the local association discretion. Bottom line... cannot exceed \$8,020.

RAF RECOGNITION EVENT RESTRICTIONS

Do not ask for any contributions at any type of recognition event! It is a thank-you event for their contribution!

Affiliates or vendors cannot help with the costs for recognition events. The Association must pay for all costs for the event and the costs are reimbursed by the PACs as described on the opposite page.

REMINDERS...

All costs must be approved by C.A.R. staff.

The goal is to have a great event and if the Association chooses to provide a commemorative award that the price can sustain for those years when you may not have funds to spend.

QUESTIONS?

If you have any questions, please contact Lisa Edwards at 916-492-5211 or lisa@car.org.

raf.car.org

RECOGNITION EVENT COMMEMORATIVE AWARD APPLICATION

REALTOR® Action Fund

RECOGNITION EVENT | COMMEMORATIVE AWARD APPLICATION



BACKGROUND

In accordance with the California Fair Political Practices Commission mandates, costs associated with RAF Recognition Events (e.g., lunches, receptions, etc.) are treated as solicitation costs. As a result, C.A.R.'s four political action committees (CREPAC, CREPAC/Federal, CREPAC (LCRC) and IMPAC (local IMPAC)) collectively, the "PACs," are responsible for covering or reimbursing costs associated with organizing such RAF Recognition Events in proportion with the allocation determined by C.A.R.'s counsel. This means that a portion of the costs must be borne by CREPAC/Federal and CREPAC. Therefore, it is within the purview of PAC leadership to review and approve any updates that impact C.A.R. policies regarding these events.

RESOLUTION: Adopted 1/15/2018 the approval and reimbursement of RAF Recognition Events as follows:

1. RAF Recognition Events held by a local Association either individually or collectively, shall not exceed 10% of the RAF amount raised by the local Association in the preceding calendar year. This policy applies to all RAF Recognition Events even if there are sufficient local IMPAC or LCRC funds to cover the costs, since the costs must come proportionally from the respective PACs to which the RAF contributions were deposited.
2. If the projected costs of an RAF Recognition Event are anticipated to exceed 10% of the RAF amount raised by the local Association in the preceding calendar year, the local Association will not receive approval and cannot hold the RAF Recognition Event.
3. **All costs must be approved in advance by C.A.R. staff for all RAF Recognition Events.** Approved costs will be allocated to and reimbursed from each of the C.A.R.-affiliated PACs as required by law. The portion allocated to CREPAC and IMPAC will be reimbursed from local allocations in those PACs (i.e., LCRC and local IMPAC funds). The portion allocated to CREPAC/Federal and CREPAC will be borne by those PACs.

4. If a local Association holds an RAF Recognition Event that was not approved, either because it was not submitted for approval or because the costs exceed the thresholds set forth in this policy, the costs must be reimbursed from the PACs by the normal allocation. Therefore, for such non-approved events:
 - a. The CREPAC Trustees shall be notified each time a local Association holds an event without approval and may take further action, if they choose.
 - b. The portion of costs allocated to CREPAC and IMPAC will be reimbursed from local allocations in those PACs, as provided above, and
 - c. The portion of costs allocated to CREPAC/Federal and CREPAC will be reimbursed by those PACs in accordance with law, but the Association will forfeit an equal amount from their local CREPAC and IMPAC allocation to the non-local allocations in those PACs. The precise ratio of the forfeit will be determined by C.A.R. staff, and may take into consideration the available local allocation amounts, legal requirements or any other factor. If there are not sufficient local allocations in those PACs at the time of reimbursement, the local Association will be required to allocate funds to those PACs until the required forfeiture is met.
- d. RAF Staff will provide an activity report to CREPAC staff for the Full Business meetings each year, so that the CREPAC Trustees may have a summary report of recognition events held for that year.

NOTE: RAF Recognition/Reception Events at which contributions are requested are treated as fundraisers and are subject to fundraiser rules and policies.

The information on this application will be used to complete a distribution flyer for your association to use to promote the event. Please fill out this application completely.

Today's Date			
Local Association			
AOR Street Address			
City			
State	CA	Zip Code	

CONTACT INFORMATION Please note, this contact information will appear on the flyer as stated below.

Full Name	
AOR Title	
Phone	
Email	

RECOGNITION EVENT | COMMEMORATIVE AWARD BUDGET WORKSHEET

REALTOR® Action Fund

BUDGET WORKSHEET RECOGNITION EVENTS | COMMEMORATIVE AWARDS



Association Name		Phone Number	
Contact Person			
Email			

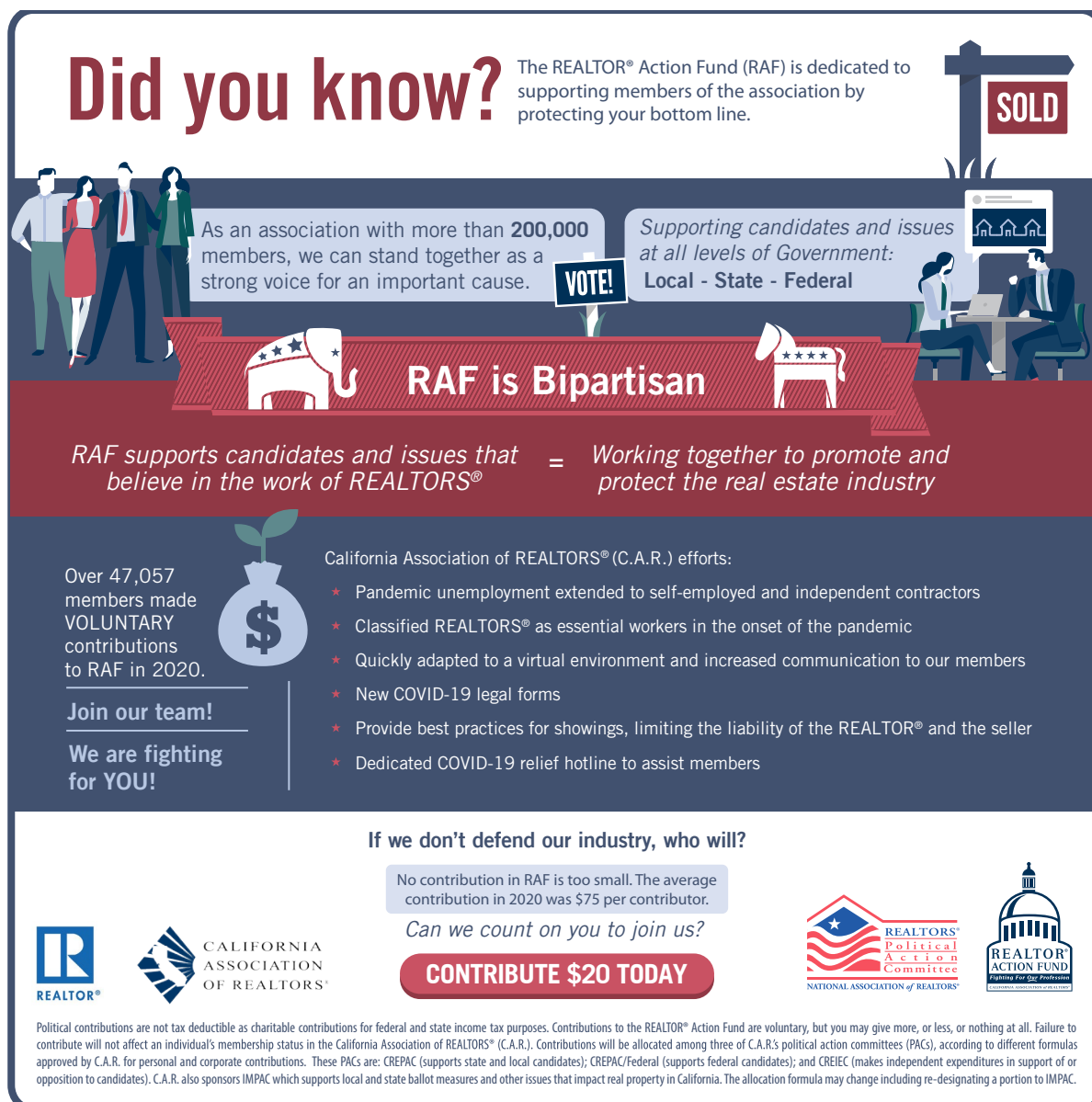
RECOGNITION EVENTS	
Event Costs	\$ Amount
Food	
Liquor	
AV	
Photography	
Invitations	
Postage	
Name Tags/Ribbons	
Catering Equipment	
Sales Tax	
Room Cost	
Decorations (i.e. Paper plates, napkins, etc.)	
Recognition Commemorative Awards Total (i.e. plaque, certificate, some other trinkets)	
Estimated Grand Total (Not to exceed 10% of previous year RAF Contributions)	
Total Previous Year RAF Contributions for the local Association	

→ Recognition Event Policy



APPRECIATION & RECOGNITION

REALTOR® ACTION FUND INFOGRAPHIC







ARISTOTLE 360

WHAT IS AI360?

AI360 is a fully integrated real-time comprehensive solution for RAF data at the local, state and national levels. It leverages the integrated combination of the on-line fundraising platform and NRDS to track members RAF contributions.

WHY IS THE IMPORTANT?

Local Associations are using AI360 to help reach their goals. With complete access to detailed reporting on member contributions, Local Associations are better able to target fundraising efforts. For example: If a member contributes at the state level and national level, local Associations can view that receipt in the custom reports and members' record immediately.

HOW CAN WE USE AI360?

- » To create a target base to solicit for RAF contributions
- » Set up your RAF events
 - › Phone Banking
 - › Email Campaigns
 - › Fundraising In-Person Events
 - › RAF Sweepstakes
 - › Track Contributors
 - › Track Major Donors

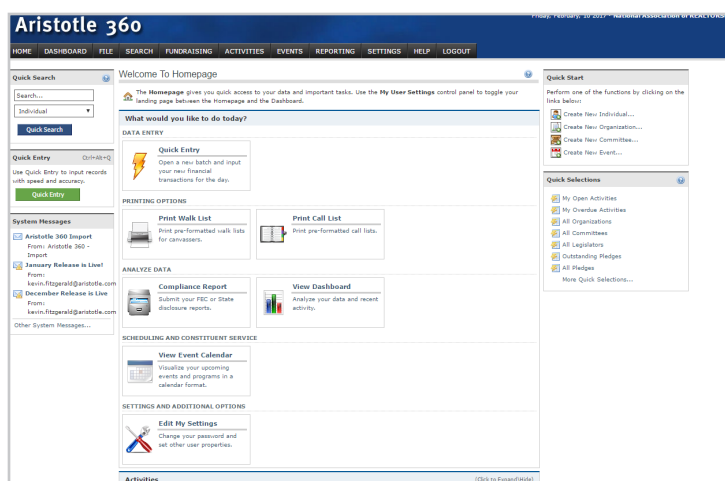
WHAT TYPES OF AI360 REPORTS CAN PULL?

- » Contributors or Non-Contributors Report
- » Office to Office Contribution Report
- » CA State Awards Report
- » Individual Contribution Report



Have a question about AI360?

Contact Jennifer Hamilton at
Jennifer.Hamilton@aristotle.com or
 888-217-9600 ext 248



Log in to AI360 at:
ai360.aristotle.com

WHICH AI360 REPORTS TO RUN?

How much have each of my members given at all levels? (\$0 -\$49; \$50 -\$148, \$149 and above)

Local Board Performance Report, Individual Level or CA State Awards Report; sort by amount column

Can we break this down by month?

Local Board Performance Report, Detail or Individual Level; sort by date column

Are my members on a payment plan?

Local Board Performance Report, Detail Level

How can I find out all my members and their lifetime contributions?

State-CA Lifetime Report

How can I found out who has never contributed?

Local Board Performance Report, Non-Giving Level; sort by all-time total column (smallest to largest)

Which offices are my best in terms of RPAC investments?

Which are my weakest?

Office Performance Report, Office Level, sort by active members column or participation column

How do I get a list of investors to give to my RPAC Chair?

Local Board Performance Report, Individual (Print) Level, radio button: Report Display

How do I find out who are my Major Investors?

CA -State Awards Report

How do I print a list of all my investors to give to my RPAC President/Chair?

Local Board Performance Report, Individual (Print) Level, click Report Display



CONTRIBUTORS OR NON-CONTRIBUTORS REPORT

Download to view a full list of your members who have (contributors) or have not (non-contributors) made a voluntary contribution to RAF. Useful when targeting members who have never contributed to RAF.

DIRECTIONS

- » Reporting
 - » Custom Report List (QRT)
 - » **NAR Local Board Performance**
 - > Source: Voluntary
 - > Level: Individual (for list of contributors)
Non Giving (to pull list of non-contributors)
 - > Received by: C.A.R.
 - > Choose your association
 - > Run Report

OFFICE TO OFFICE CONTRIBUTION REPORT

Download to view a full list of your members who have made a voluntary contribution to RAF, by office. Useful when conducting an Office to Office Contest.

DIRECTIONS

- » Reporting
 - » Custom Report List (QRT)
 - » **NAR Office Performance Report**
 - > Source: Voluntary
 - > Level: Office
 - > Received by: C.A.R.
 - > Recognition Year: Enter Year
 - > Run Report

CA STATE AWARDS REPORT

Download to view a full list of your members who have made a voluntary contribution of \$449 or more to RAF. Useful for recognizing Major Investors.

DIRECTIONS

- » Reporting
 - » Custom Report List (QRT)
 - » **CA State Awards Report**
 - > Source: Voluntary
 - > Recognition Year: Enter Year
 - > Run Report

INDIVIDUAL CONTRIBUTION REPORT

Download to view an individual member's voluntary contribution history.

DIRECTIONS

- » Reporting
 - » Custom Report List (QRT)
 - » **NAR Individual Summary Report**
 - > Source: Voluntary
 - > Enter NRDS#
 - > Run Report

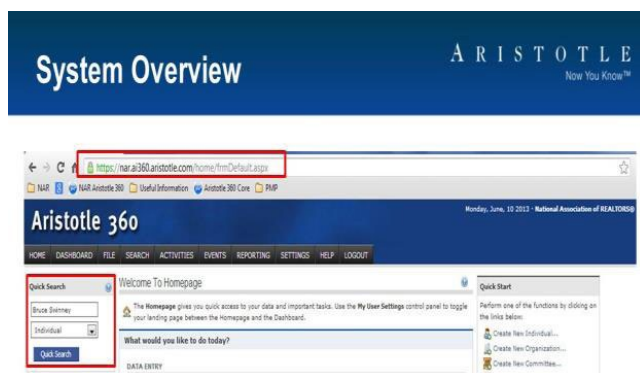




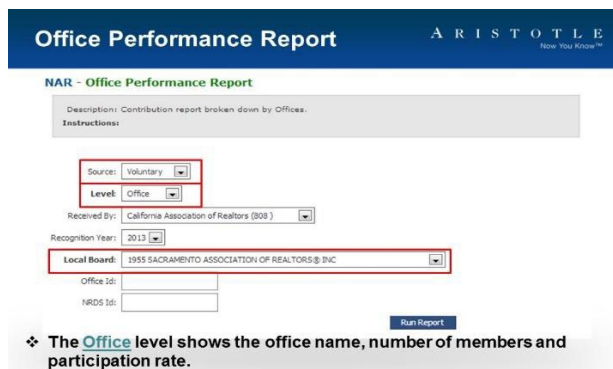
ARISTOTLE 360 OFFICE TO OFFICE REPORTS

To pull an Office to Office report, please follow the 5 Steps below. The purpose of this report is to help determine your "office" category sizes and to prioritize your office visits by the RAF Team members.

STEP 1: Login to AI360



STEP 4: Click on NAR Office Performance Report and follow the red highlighted portions



Your RAF Team has determined the categories by pulling the above report. Now the next step is to pull an individual report for offices that each RAF Team Members will visit. Stay in the Office Performance Report (see Step 4) and make the changes indicated in Red: Change "office" to "individual" and put in the Office ID – (See Step 5).



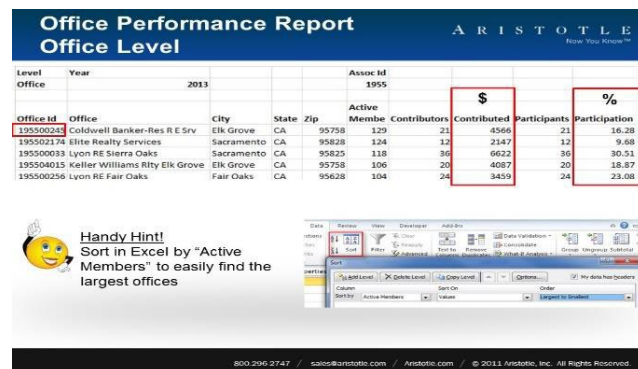
This report will show you the members that paid the previous year. This is great tool to have to be able to provide some statistics on how many members contributed to determine your "Pitch" for the office.

STEP 2: Click on Reporting and then

STEP 3: Click on Custom Report



STEP 5: Sort in Excel by Active Members to easily find the largest offices





ARISTOTLE 360 PHONE BANKING CAMPAIGN

Phone-a-Friend – Phone Bank Wizard



What to prepare:

1. Create event.
2. Create phone bank webform for specific phone bank, link event, update engagement levels. *
3. Refine target list and upload.
4. Upload volunteer list (.csv file with names and NRDS numbers for each volunteer).
5. Draft 3 auto-generated emails. These emails will be sent during the phone bank by your volunteers.
6. Draft phone bank call script.

* State Associations update webforms. Each state has a phone bank webform template that can be copied and updated for each phone bank.



5 Steps of the Phone Bank Wizard

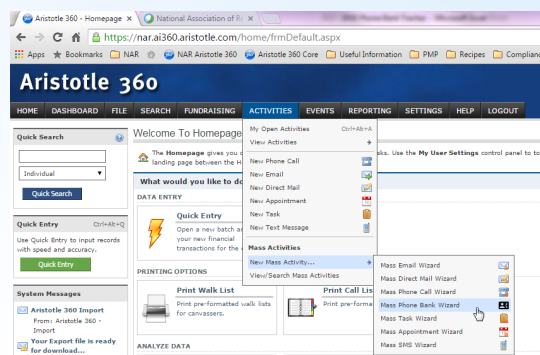
1. Welcome
2. Administration
 - Name your phone bank
 - Select federated access
 - Select phone bank webform
3. List Handling
 - Upload targets and volunteers
 - Prioritize call list
4. Call Script
 - Paste in call script
5. Automated Email
 - Paste in copy for 3 emails that will be generated during the phone bank



- Send Email (with investment link)
- Thank You Non-Investor
- Thank You Investor



Phone-a-Friend – Phone Bank Wizard Tutorial



1. To launch the wizard, go to Activities>New Mass Activity>Mass Phone Bank Wizard



Phone-a-Friend – Phone Bank Wizard Tutorial

Aristotle 360 Mass Phone Bank Wizard

This wizard allows you to create and execute a set of activities for multiple records in your database.



Welcome to the Mass Phone Bank

This Wizard will Guide you through the setup of a Phone Bank that will associate multiple callers (Participants) to a list of multiple targets (Call Recipients).

Based on the two distinct lists you define, 360 will automatically create a call queue for the participant(s) to call.

This functionality is integrated with Aristotle's Advocate Panel from which the participant may process credit card donations, send targets to a webform, and record activity.

1 / 5 **Next**

2. There are 5 steps to the phone bank wizard. Step 1 is the "Welcome" screen.
3. Click "Next."

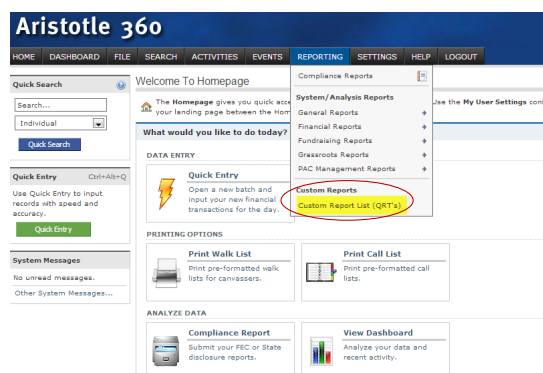




ARISTOTLE 360 CA STATE AWARDS

Pull this report to find your Major Investors.

STEP 1: Login to AI360



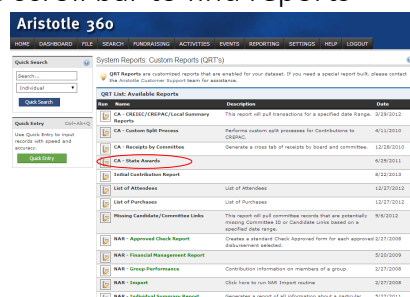
STEP 4: Follow the red highlighted portions

STEP 2: Click on Reporting and then

STEP 3: Click on CA-State Awards

Custom Reports:

Use the scroll bar to find reports



STEP 5: Review Report: Note: Current-1 \$ is the amount they contribute in the previous year.

CA - State Awards Report

ARISTOTLE
Now You Know™

CA - State Awards

Description:
Instructions:

Source: **Voluntary** Be sure you click on Source - Voluntary

Local Board: **3660 SAN FRANCISCO ASSOCIATION OF REALTORS**

Recognition Year: **2013** Update the year to current year

Active Only: **Yes**

Run Report

800.296-2747 / sales@aristotle.com / Aristotle.com / © 2013 Aristotle, Inc. All Rights Reserved.

CA – State Awards Report

ARISTOTLE

Now You Know™

Title	Year	Sorted	Source	Current	Previous	Member of	Type	Status
State Award 12013		Name	Voluntary					
MEDS ID	First Name	Last Name	Current \$	Award	-1\$	Award	Member of	Type
166002275	Linda	Harrison	764.47	NAR Sterling R	90	NAR Sterling R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166000546	Vincent	Malta	765	NAR Golden R	466.5	NAR Golden R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166000431	John Yen	Wong	765	NAR Golden R	1000	NAR Golden R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166011180	Kevin	Birmingham	498	California Silver Be	0		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
162001869	Lauren	Parry	498	California Silver Be	0		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166007748	Betty	Tash	498	NAR Golden R	498	NAR Golden R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166000970	Jeanne	Anderson	489	NAR Golden R	489	NAR Golden R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001319	Matthew	Borland	489	NAR Golden R	489	NAR Sterling R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001761	Dora	Crowder	489	NAR Sterling R	489	NAR Sterling R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001793	William	Jarren	489	California Silver Be	49		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001101	Carol	Luckenbach	489	NAR Sterling R	489	NAR Sterling R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001592	Timothy	Cannon	489	NAR Sterling R	489	NAR Sterling R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166002354	David	Parry	489	NAR Golden R	489	NAR Golden R	SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166001673	John	Absoluten	148	True Cost of Busine	49		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166012084	Christine	Dwiggin	148	True Cost of Busine	148		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166000452	Patrick	Fedon	148	True Cost of Busine	148		SAN FRANCISCO ASSOCIATION OF REALTORS R	A
166000044	Lorie	French	148	True Cost of Busine	147		SAN FRANCISCO ASSOCIATION OF REALTORS R	A

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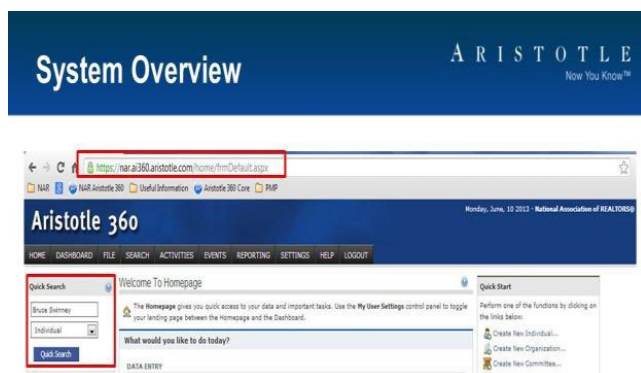
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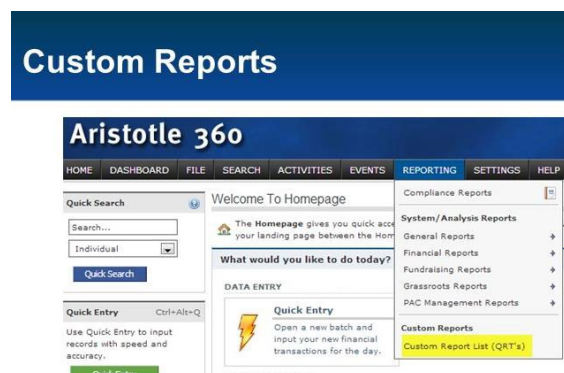
ARISTOTLE 360 INDIVIDUAL CONTRIBUTION

Pull this report to find your members' contributions.

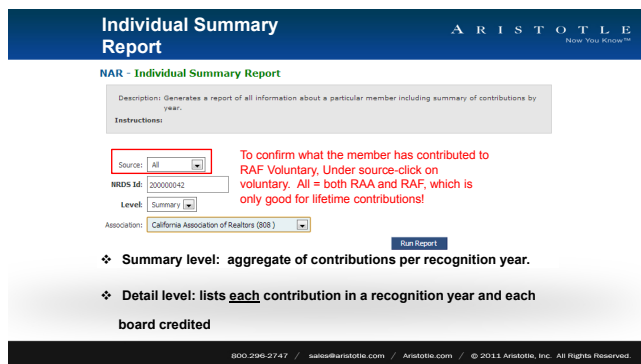
STEP 1: Login to AI360



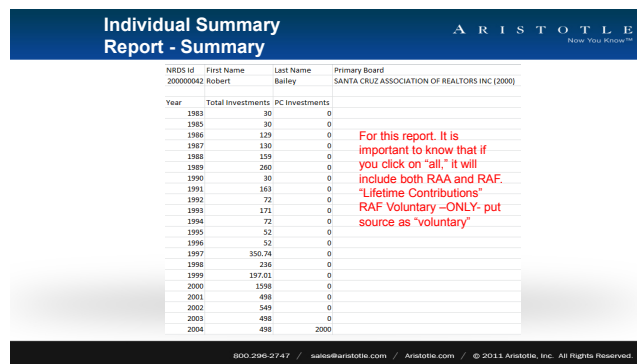
STEP 2: Click on Reporting and then
STEP 3: Click on Custom Report



STEP 4: Click on Individual Summary Report and follow the red highlighted portions



STEP 5: Review Individual Summary Report

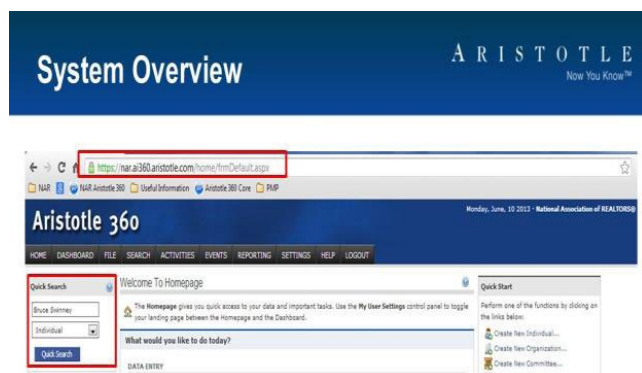




ARISTOTLE 360 CALIFORNIA LIFETIME CONTRIBUTIONS

Pull this report to find your members and their lifetime contributions.

STEP 1: Login to AI360

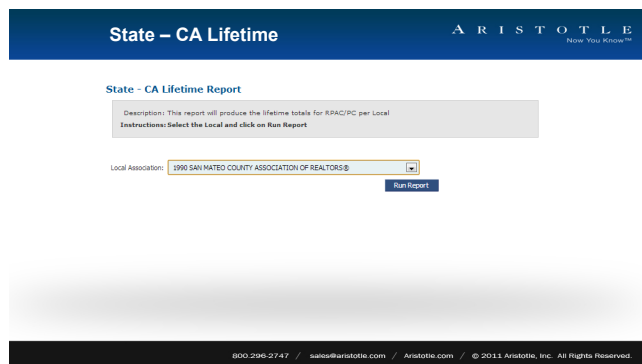


STEP 2: Click on Reporting and then

STEP 3: Click on Custom Report



STEP 4: Select your Local Association



STEP 5: Review lifetime contributions, which includes RAA and RAF

State – CA Lifetime				
Association				
SAN MATEO COUNTY ASSOCIATION OF REALTORS®				
NRDS	First Name	Last Name	RPAC TOTAL	PC TOTAL
199009540	Dean	Delis	294	0
166000207	Merton	Chun	245.02	0
199007889	Chris	Stanek	448	0
199017130	Ching-Ling	Yao	49	0
199019616	Ana	Chavez	246	0
199021914	Jennifer	Dollard	246	0
199019666	Christina	Marshall	49	0
199020691	Rajko	Novakovich	147	0
191005393	Kathleen	Templin	551.01	0

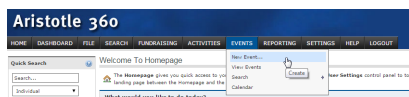


ARISTOTLE 360 EVENTS MANAGEMENT

Events Management in Aristotle 360

Creating an Event

1. To create an event in Aristotle, go to the Events tab and click New Event.



2. Fill in the Event Title using the following naming scheme: Rec Year – State Abbreviation – Local Name – Event Name E.g. 2017 AZ-Tucson Spring Sweepstakes (or 2016 AZ-TAR Phone Bank).

3. Fill in the event date in the Start Date/Time and End Date/Time fields (you can always change the date at a later time).

4. To find your event again, go to Events>View Events. If your event does not appear in the list of events, change the From date in the Date Range field. Click Search.

Event Title	Start Date	Time	Contact Person	City
2017 AZ Tucson Sweepstakes	01/30/2017	09:00 AM	Steve Huffman	Tucson
2016 AZ-TAR Phone Bank	10/01/2016	09:00 AM	Rene Lupton	Tucson

CREATING AN EVENT

STEP 1: To create an event in Aristotle, go to the Events tab and click New Event.

STEP 2: Fill in the Event Title using the following naming scheme: Rec Year – State Abbreviation – Local Name - Event Name E.g. 2017 AZ-Tucson Spring Sweepstakes (or 2016 AZ-TAR Phone Bank).

STEP 3: Fill in the event date in the Start Date/Time and End Date/Time fields (you can always change the date at a later time).

STEP 4: To find your event again, go to Events>View Events. If your event does not appear in the list of events, change the From date in the Date Range field. Click Search.

Adding Attendees to Events

You only add attendees to events if you are trying to track members who attended your function but have no receipts/payments associated with the fundraiser. Any webforms linked to events will automatically populate your event with receipt and attendee information. To see events linked to webforms, look at your event under the Webforms panel.

1. Determine if you are going to add one attendee at a time or if you are going to add a list of attendees. If you are going to add a list of attendees, you will need to import the list first. Please see instructions for Creating Groups and Lists to import your list of attendees then follow the instructions below.
2. Locate your event by going to Events>View Events.

ADDING ATTENDEES TO EVENTS

You only add attendees to events if you are trying to track members who attended your function but have no receipts/payments associated with the fundraiser. Any webforms linked to events will automatically populate your event with receipt and attendee information. To see events linked to webforms, look at your event under the Webforms panel.

STEP 1: Determine if you are going to add one attendee at a time or if you are going to add a list of attendees. If you are going to add a list of attendees, you will need to import the list first. Please see instructions for Creating Groups and Lists to import your list of attendees then follow the instructions below and at right.

STEP 2: Locate your event by going to Events>View Events.



3. Select your event.
4. To add attendees, expand the attendees panel and click Add Attendee/Participant. If you want to add a multiple attendees, click the selection for Add List. If you want to add just one attendee, skip to Step 7.

STEP 3: Select your event.

STEP 4: To add attendees, expand the attendees panel and click Add Attendee/Participant. If you want to add a multiple attendees, click the selection for Add List. If you want to add just one attendee, skip to Step 7.

STEP 5: Enter your list name (or part thereof) in the search field and click the magnifying glass. Double click your list.

STEP 6: Change the field for Participation Status to "Confirmed" and click Save Changes.

STEP 7: If you want to add one attendee to an event, expand the attendees panel and Add One.

7. If you want to add one attendee to an event, expand the attendees panel and Add One.

STEP 8: In the pop-up window, type the name of the person you want to add in the Search field and click Search. Select the name of the person you want to add. Click Save and Close.

8. In the pop-up window, type the name of the person you want to add in the Search field and click Search. Select the name of the person you want to add. Click Save and Close.



raf.car.org