



CALIFORNIA
ASSOCIATION
OF REALTORS®

ALF

ADVOCACY LOCAL FUND

FUNDING REQUEST FORM

Requesting Local REALTOR® Association:		Date Submitted:	
Contact Person:		Phone Number:	
Email Address:		Association No. 60200-00- -0000	
Purpose of funding (brief description):		Amount Requested: \$	
<p>Check only one of the four “buckets” below, which applies to your spending. Please do not combine spending from more than one bucket into a single ALF request:</p> <p style="text-align: center;"> <input type="checkbox"/> Legislative Day or Hill Visits <input type="checkbox"/> GAD Expenses <input type="checkbox"/> Events and Education <input type="checkbox"/> General Advocacy </p>			
Payee (local REALTOR® Association, vendor, organization, individual member or other):			
Address		City	Zip
Please indicate if payment should be sent to the association on the payee’s behalf (if payee is other than the requesting local association): <input type="checkbox"/> Yes <input type="checkbox"/> No			
Payment should be mailed to the attention of:			
If you require immediate delivery, please provide your account information, UPS/FedEx#:			

ADVOCACY LOCAL FUND (ALF) GUIDELINES

ALF May Not be used for Ballot Measure Campaigns or to support candidates running for public office.

ALF expenses must support issues advocacy at the local association level. Those expenses fall into one of the following four “buckets”:

- General Advocacy – Non-ballot campaign issues, such as ordinance and other council actions
- Events and Education – Sponsorships, hosting, conferences, subscriptions, memberships, etc.
- GAD Expenses – Incidental expenses and contract fees
- Legislative Day – Expenses to send members/staff to C.A.R. Legislative Day and/or Capitol Hill visits

Additional Explanations

- General advocacy may include fees for a lobbyist or consultant, research fees, printing and advertising fees, travel, meals and other incidentals.
- If ALF is to be used for media expenses, C.A.R. requires that you submit draft copies of the media materials BEFORE the local Association commits to those expenditures.
- Events and Education may include hosting an event to educate members, the public or public officials about an issue, sponsoring policy conferences, or local events like chamber mixers, state of the city speeches, or a meet-and-greet with elected officials or candidates or membership in advocacy organizations.
- For events that do not focus entirely or primarily on issues advocacy, C.A.R. will ask you to “pro-rate” your expenses to reflect the appropriate portion of ALF reimbursement.
- ALF may not be used to pay for a GAD salary. It may be used to pay for contract fees or travel and incidentals related to GAD activities.
- ALF may be used for expenses to attend C.A.R. Legislative Day (1-2 nights and days) or Hill Visits (2-3 days and nights), including travel, meals, lodging and incidentals. It may not be used to attend C.A.R. or NAR business meetings.
- ALF may not be used for general operating expenses, routine business expenses or expenses related to the general affairs of the local Association.
- ALF may not be used to donate to charitable organizations. It may be used to sponsor organizations that engage in issues advocacy.
- ALF may not be used to support RAF fundraising or recognition activities, including events at which RAF donors get discounts, advanced access or other preferential treatment.

GIFTS TO PUBLIC OFFICIALS: Please **notify C.A.R. immediately** if you plan to request ALF funds to pay for a gift to a state elected or appointed government official, their staff or a candidate for state elected office, even if you don't plan to submit your request until a later time.

If all or a portion of your ALF request is to pay for a gift to a state elected or appointed government official, their staff or a candidate for state elected office (including a gift of food and beverage), the following information must be attached and the request for reimbursement must be submitted to C.A.R. within 21 days of the gift:

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

Supporting Documents

Local Associations are not required to submit supporting documents with their request. However, they are required to gather and retain those documents before submitting their request to C.A.R. Those documents must be maintained and accessible for a period of seven years. The local Association should be able to provide any and all supporting materials immediately upon request from C.A.R. or its auditors. A local Association that is not able to provide any requested documents will not be eligible to receive the requested ALF funds or will be asked to return those funds if they have previously been disbursed. The required supporting documents include:

- Local Association Board Minutes Indicating Amount Requested and Recipient
- Receipts for Reimbursement and/or Vendor Invoices
- [Spending detail for Leg Day and Hill Visits Expenses](#)
- Brochures/Fliers or Other Supporting Documents

Submission Guidelines

To receive ALF revenue, all local Associations are required to submit a completed and signed request via the [basecamp platform](#). If you have not already set up your access to the C.A.R. account on basecamp, please contact Rick Laezman at (213)739-8273 or richardl@car.org or Emmagene Samuel at (213) 739-8375 or emmagenes@car.org.

NOTE: To comply with C.A.R. guidelines, **ALF requests submitted more than 60 days after the activity may not be eligible for reimbursement.**

Please do not combine expenditures from more than one of the four “buckets” identified above into one ALF request.

Self-Certification

The undersigned President and Executive Officer on behalf of their local Association certify that they have read all of the above guidelines, that their local Association has followed these guidelines and that any and all supporting documentation can be provided by the local Association upon request by C.A.R. or its auditors.

Association President Name (Print or Type):	Association Executive Name (Print or Type):
Association President Signature:	Association Executive Signature: