

GUIDELINS FOR REALTOR® Action Fund Telephone Solicitation

Thank you for participating in this phone bank to request investments for the REALTOR® Action Fund (RAF) 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.

- 1. 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.
- 2. 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.
- 3. 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 an investment to RAF" and provide the member with C.A.R.'s phone number (916) 492-5211 for any future questions.
- 4. 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 an investment to RAF.
- 5. BE KNOWLEDGEABLE.** Be prepared to answer basic questions about the REALTOR® Action Fund, the 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 an investment. 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.
- 6. 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.

- 7. FALSE OR MISLEADING STATEMENTS.** Do not make any false or misleading statements about the nature of investments to the REALTOR[®] Action Fund, including (i) any statement that investments to the REALTOR[®] Action Fund are required, rather than voluntary (investments to the REALTOR[®] Action Fund are voluntary and are not required as a condition of C.A.R.'s membership); (ii) the purpose of requesting the investment; (iii) the tax-deductible nature of the investment (investments to the REALTOR[®] Action Fund are not tax-deductible); or (iv) how the investment will be used.
- 8. 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.
- 9. 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.
- 10. 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 investments to the REALTOR[®] Action Fund on behalf of C.A.R. The following telephone script should be used when requesting investments 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.

1. PHONE BANKING RULES

» All Phone banking MUST be conducted at a Local Association of REALTORS[®] (AOR) office or alternative that has been set up.

» 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 investments are not tax deductible as charitable investments for federal and state income tax purposes. Investments 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.

2. 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).

RAF is a vital service for YOU and YOUR business. Did you know that 30% of your RAF investment supports local issues that will affect your livelihood? By investing to the REALTOR[®] Action Fund, you are helping to protect private property rights through C.A.R.'s lobbying efforts, and local issues and candidate campaigns. Your participation will keep this going! Investments to the REALTOR[®] Action Fund have stopped:

- 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.
- Direct taxing of REALTOR[®] commissions and other services related to the transaction.

- Political candidates who are against building housing and against REALTOR® issues
- Independent Contractors License

By investing \$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!

REALTOR® Action Fund Phone Banking Acceptance & Denial Script

1. IF THE ANSWER IS YES-THEN READ THE DISCLOSURE:

“Political investments are not tax deductible as charitable investments for federal and state income tax purposes. Investments to the REALTOR® Action Fund are voluntary, and the amounts suggested are only guide- lines 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 to collect the investment.

“Thank you very much for supporting the REALTOR® Action Fund! How would you like to make your investment? We accept investments by VISA, MasterCard, American Express, Discover, online at [We will provide you a link you can send them in an email.](#)

» **TO PAY BY CREDIT CARD/ ONLINE:** You may take the member’s credit card information and enter it directly on the website with the member or if the member wants to take care of this themselves, please direct them to [We will provide you a link you can send them in an email.](#)

» **CLOSING “THANK YOU”:** “Thank you for your investment and supporting C.A.R.’s REALTOR® Action Fund. If you have any questions or comments, please contact **Lisa Edwards** at **(916) 492-5211.**”

2. IF THE MEMBER’S ANSWER IS STILL “NO”:

“Thank you for your time and for your continued membership with C.A.R. Have a good morning, afternoon, or evening.”