


Guidelines For RAF Telephone Solicitation

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

- 1) **Business Phone Numbers Only.** Calls must be made to the member's **business phone number only**, such as an office number or business cell number. Calls may not be made to a member's home phone number or non-business cell number. If you are unsure whether a phone number is a business number or a home phone/non-business cell number, obtain C.A.R.'s approval prior to calling that number.
- 2) **Call Hours.** Do not call members before the hours of 8 a.m. or after 9 p.m. (local time at the called party's location).
- 3) **Unanswered Calls.** Do not disconnect an unanswered call before at least 15 seconds or 4 rings.
- 4) **Identify Yourself/Purpose of Call.** Give your name, state that you are calling on behalf of C.A.R.'s REALTOR® Action Fund to solicit a contribution to the fund, and give the member C.A.R.'s phone number [(916) 492-5200].
- 5) **Courteous, Friendly Call.** When calling members, portray a positive attitude during the call. Be courteous, friendly and respectful at all times. Speak clearly, confidently, with a good volume, tempo and tone. Be a good listener; don't interrupt or speak over a member during the call. Allow the member to hang up first before ending the call. Remember, the member is taking valuable time away from his or her business to listen to you, and your interaction with the member may affect his or her decision to make a contribution.
- 6) **Be Knowledgeable.** Be prepared to answer basic questions about the REALTOR® Action Fund, the different contribution levels and amounts, and the use of member contributions. 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 can't answer a member's question, tell the member that you will call the member back with the answer, or if the member desires, he or she may speak with Lisa Edwards directly at (916) 492-5211.

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- 7) **Threats, Intimidating Language.** Do not use threats, intimidation, or profane or obscene language during a call. Do not make repeated calls in an attempt to annoy abuse or harass the member.
 - 8) **False or Misleading Statements.** Do not make any false or misleading statements about the nature of 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. membership); (ii) the purpose of soliciting 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.
 - 9) **No Auto dialers and Prerecorded Messages.** Use of auto dialers and prerecorded messages is strictly prohibited. You may not use auto dialers or prerecorded messages when calling members.
 - 10) **Caller ID.** Do not block caller ID when making a call. You must transmit your name and a telephone number for members to use during regular business hours to make a request not to be called.
 - 11) **Member “Do Not Call” Requests.** If a member makes a request not to be called, provide the member’s name and phone number to Lisa Edwards **immediately** at (916) 492-5211. Do not make any further calls to the member.

C.A.R. is committed to providing excellent customer service to our members. You represent C.A.R. each time you call a member, and your interaction with the member will leave a lasting impression and reflect positively or negatively upon C.A.R. Following these guidelines will help to ensure the best calling experience possible for both you and the member. If you have any questions or comments, please don’t hesitate to contact Lisa Edwards at (916) 492-5211.

RAF Contribution Solicitation

Script

Thank you for soliciting contributions to the REALTOR® Action Fund on behalf of C.A.R. The following telephone script should be used when soliciting contributions from C.A.R. members. The script may be modified with C.A.R.'s prior written approval. If you have any questions, please contact Lisa Edwards, Political Affairs Coordinator at (916) 492-5211.

1. Opening Greeting:

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

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

2. If The Answer Is Yes:

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

- a. **To Pay By Check:** "Please make your check payable to "C.A.R. Political Action" and mail your check to: California Association of REALTORS®, P.O. Box 660430, Sacramento, CA 95866."
- b. **To Pay By Credit Card:** collect the member's credit card number and expiration date, and provide the information to Lisa Edwards at (916) 492-5211.
- c. **To Pay Online:** "You can make your contribution online by going to C.A.R.'s website at www.car.org, then click on 'Governmental Affairs,' then click on REALTOR® Action Fund" 'Pay Contributions Online.' Or, if you like, we can send you a contribution form by mail or fax, and you can mail or fax the form in." [If the member wants a contribution form by fax or mail, obtain the member's fax or mailing address and provide it to Lisa Edwards at (916) 492-5211.]
- d. **Closing "Thank You":** "Thank you again for supporting C.A.R.'s REALTOR® Action Fund. If you have any questions or comments, please contact Lisa Edwards at (916) 492-5211."

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3. If The Member Does Not Want To Contribute:

"I understand that \$197 may seem like a lot, but it's actually very little in terms of how much money the REALTOR® Action Fund saves REALTORS® each year. C.A.R.'s Government Affairs victories add up! Your \$197 investment to the REALTOR® Action Fund delivers an individual return of almost \$13,738 in REALTOR® savings. For example:

- REALTORS® saved \$4,589 annually by stopping costly point-of-sale mandates
- REALTORS® saved \$4,783 annually by protecting the mortgage interest deduction
- REALTORS® \$3,439 saves annually by preserving dual agency
- REALTORS® \$812 saves annually by preventing frivolous lawsuits

Are you sure I can't persuade you to donate \$197 to the REALTOR® Action Fund, or perhaps a smaller amount?"

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

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