RAF PHONE BANK BEST PRACTICES & SET-UP GUIDE

A successful REALTOR® Action Fund (RAF) Phone Bank creates energy, teamwork, and meaningful member engagement. The following best practices are designed to help Local Associations organize an effective, professional, and enjoyable phone banking experience.

BEST PRACTICES FOR A SUCCESSFUL PHONE BANK

- Create a fun and energetic environment by decorating the room. Center the event around a meal or refreshments to create a welcoming and social environment for volunteers.
- If possible, have computers set up in advance so volunteers can immediately sit down at a workstation and begin calling.
- Computers with a mouse are generally more user-friendly and efficient than tablets for phone banking activities.
- Headsets are recommended so volunteers can type and navigate systems hands-free while speaking with members.
- Post live results and participation updates throughout the event to build excitement and momentum.
- Recommended Event Schedule:
  - 30 minutes prior – Volunteer arrival, login, orientation, and training
  - 2–3 hours – Calling session
  - End of event – Meal, recognition, and celebration
- Provide power strips, extra cell phone chargers, pens, and paper at each workstation.
- Have experienced staff or volunteers available throughout the event to answer questions and provide support.
- Send follow-up emails promptly to all members who contributed during the phone bank to thank them for their support.

PHONE BANK SET-UP PROCESS

1. **Step 1** – Visit raf.car.org and complete the RAF Phone Bank Application.
2. **Step 2** – Once the application is received, the RAF Team will send an email to the Aristotle staff responsible for phone bank set-up and include all appropriate contacts on the communication.
3. **Step 3** – Work directly with Aristotle staff to complete the phone bank set-up, system configuration, and volunteer training for the calling program.

Strong planning, volunteer engagement, and timely follow-up will help create a successful RAF Phone Bank.

GUIDELINES FOR REALTOR® ACTION FUND TELEPHONE SOLICITATION

IMPORTANT:

Phone banking costs must be kept under $499.99. If costs exceed $499.99, reimbursement will be processed differently.

AFFILIATE members are prohibited from soliciting REALTORS® for REALTOR® Action Fund (RAF) contributions; however, AFFILIATE members may make investments to CREIEC.

Thank you for participating in this phone bank to request investments for the REALTOR® Action Fund (RAF) on behalf of the California Association of REALTORS® (C.A.R.). These guidelines are intended to ensure calls are professional, compliant with federal and state law, and create a positive experience for both the caller and the member.

BEST PRACTICES FOR A SUCCESSFUL PHONE BANK

- **Be Prepared** – Familiarize yourself with RAF goals, investment levels, advocacy wins, and frequently asked questions before making calls.
- **Create a Positive Calling Environment** – Conduct calls from an approved location with minimal distractions and have all materials readily available.
- **Keep Conversations Personal** – Focus on how RAF protects REALTORS®, their business, and their clients.
- **Listen First** – Allow members time to ask questions and engage in conversation.
- **Focus on Participation** – Every voluntary investment helps strengthen REALTOR® advocacy efforts.
- **Follow Up Promptly** – Send requested information or payment links immediately following the call.

TELEPHONE SOLICITATION GUIDELINES

- **USE BUSINESS PHONE NUMBERS ONLY** – Calls may only be made to business numbers, including office numbers or business cell phones.
- **CALL HOURS** – Calls may only be made between 8:00 a.m. and 8:00 p.m. local time.
- **IDENTIFY YOURSELF AND THE PURPOSE OF THE CALL** – Clearly identify yourself and explain that you are calling on behalf of C.A.R.'s REALTOR® Action Fund.
- **BE COURTEOUS AND PROFESSIONAL** – Maintain a respectful, positive, and professional tone throughout the call.
- **BE KNOWLEDGEABLE** – Be prepared to answer questions regarding RAF, advocacy efforts, and investment opportunities.
- **NO THREATS OR INTIMIDATION** – Threatening, abusive, or harassing language is strictly prohibited.
- **NO FALSE OR MISLEADING STATEMENTS** – Investments are voluntary and are not tax deductible.
- **NO AUTO-DIALERS OR PRERECORDED MESSAGES** – Use of auto-dialers or prerecorded messages is prohibited.
- **CALLER ID** must display a valid name and number.
- **DO NOT CALL REQUESTS** – Immediately report any do-not-call requests to Lisa Edwards at lisae@car.org.

PHONE BANKING SCRIPT

Hello, my name is [Your Name], and I am a fellow REALTOR®. May I speak with [Member Name]?

I'm calling today to talk with you about the importance of the REALTOR® Action Fund (RAF).

RAF is a vital investment in protecting your business and the real estate industry. Did you know that 30% of RAF investments support local advocacy efforts and issues that directly impact REALTORS® and property owners in your community?

Through RAF, REALTORS® help support advocacy efforts that protect private property rights and oppose legislation that could negatively impact homeownership, real estate transactions, and independent contractors.

RAF-supported efforts have helped oppose:

- Point-of-sale mandates that could increase costs for homeowners
- Taxes on REALTOR® commissions and transaction services
- Anti-housing and anti-REALTOR® legislation
- Restrictions impacting independent contractors

By investing just $25 to RAF, you help strengthen REALTOR® advocacy efforts at the local, state, and federal levels while helping protect your business, your livelihood, and the future of homeownership in California.

REQUIRED DISCLOSURE

Political investments are not tax deductible as charitable investments for federal and state income tax purposes. Investments in 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.).

CLOSING THANK YOU

Thank you for your investment and for supporting C.A.R.'s REALTOR® Action Fund. If you have any questions, please contact Lisa Edwards at lisae@car.org.