



## Issues Political Action Committee

### Local Issues Fund Guidelines

#### Purpose

The Texas REALTORS® Issues Political Action Committee (TRIP) provides financial support for statewide and local REALTOR®-supported activities to enable them to organize and manage effective campaigns to promote REALTOR® positions on public policies (laws, regulations, and other courses of action).

To support local REALTOR® association political issues activities, TRIP has created the Local Issues Fund. The Local Issues Fund is established for the purpose of supporting or opposing local measures or local actions proposed by local governmental bodies which concern the preservation of real property rights, real estate brokering, and the legal and economic rights of the real estate industry.

#### Local Issues Fund Categories

TRIP provides assistance to local associations through three principal categories:

- **General Support:** provides funding for independent local issue advocacy campaigns for activities and campaign tools that support REALTOR® positions on public policies.
- **Coordinated Support:** provides funding for a campaign in which Texas REALTORS® and a local association work as partners to plan an advocacy campaign to enact, amend, or defeat a public policy on an issue of importance to REALTORS®.
- **Advocacy Support:** provides assistance via technical expertise and resources to a local association in the implementation of an advocacy campaign.

**NOTE:** in addition to TRIP, there are other Texas REALTORS® and NAR programs that can provide resources to local associations, including the state association's Legal Defense Fund, and NAR's Land Use Initiative and grant programs such as the Smart Growth or Housing Opportunity Grants. For more information, contact Texas REALTORS® staff at [TRIP@texasrealtors.com](mailto:TRIP@texasrealtors.com) or (512) 480-8200.

#### Program Funding and Disbursement

The Issues Political Action Committee is funded by contributions from the Texas REALTORS® and other interested persons. The State and Local Issues Committees are authorized by the Texas REALTORS® Board of Directors to expend these funds on an annual basis.

Local REALTOR® associations in Texas may apply for TRIP Local Issues funds by submitting a completed application to Texas REALTORS®, which is reviewed by staff and then considered for approval by the Texas REALTORS® Local Issues Committee.

## Local Issues Committee

The Local Issues Committee consists of 15 to 19 members (including REALTORS® and local association staff), as appointed by the Texas REALTORS® Chairman-Elect. Members serve a three-year term.

The Local Issues Committee is tasked with reviewing applications for local assistance; overseeing the Local Issues Fund; and expending those funds as deemed appropriate.

The Committee is authorized to expend funds up to \$150,000 for any one issue campaign. Requests for funding in excess of \$150,000 must be approved by the Texas REALTORS® Leadership Team.

## Eligible Activities

TRIP may provide assistance for activities that:

- Support or defeat any local measure or governmental action or potential action that affects real property rights, real estate brokers, or the real estate industry.
- Lobby or otherwise persuade governmental officials, interested groups, or the general public to support or oppose any local measure or governmental action or potential action that affects real property rights, real estate brokers, or the real estate industry.
- Host or sponsor events to support or oppose any local measure or governmental action or potential action that affects real property rights, real estate brokers, or the real estate industry.

## Ineligible Issues and Activities

The following issues and activities are not eligible for a TRIP grant:

- **Candidate Elections.** Activities include, but are not limited to: research, polling, phone banks, voter contact, public relations, media campaigns, or other activities undertaken in connection with or otherwise related to the support of or opposition to any candidate for elected office. Please contact TREPAC at [TREPAC@texasrealtors.com](mailto:TREPAC@texasrealtors.com) for assistance with candidate campaigns.
- **Legal Action.** Litigation involving local associations, real estate practitioners or the real estate business. Please contact the Legal Department at [kflanagan@texasrealtors.com](mailto:kflanagan@texasrealtors.com) for assistance with the Legal Defense Fund.
- **Federal Issues.** Activities related to federal legislative or regulatory policies that involve advocacy to the executive or legislative branches of the federal government.
- **Public Employees.** Activities include, but are not limited to: public employee collective bargaining, negotiations over public employee pensions.
- **Completed Activities.** Activities related to a public policy advocacy campaign that is concluded by the time of application.

**NOTE: Bond Measures.** Bond measures are not expressly prohibited from eligibility, but are rarely approved due to their frequency, complexity, and general impact to property taxes and housing affordability.

## Grant Application Process

### Application

A Local Issues Fund Grant Application must be submitted with all required fields completed, including those for strategy, budget, timeline, and funding sources. Texas REALTORS® staff can assist with the development of the initial application if needed.

An appropriate staff person (association executive, government affairs director, other designee) must complete and submit the application, and be identified and serve as the primary point of contact on communications between the association and Texas REALTORS® (including staff, leadership and consultants).

A complete application must be signed by both the applicant's "chief elected officer" (a REALTOR® member, e.g.: the association President) and the "chief staff officer" (the association executive).

### Territorial Jurisdiction Policy for Local Advocacy

If the activity planned by a Local Issues Fund grant request will directly impact the territorial jurisdiction of another local association, the applicant association must provide notice of the request to each impacted local association and allow at least 5 business days for each notified association to respond. If an impacted association objects to the request, and the dispute cannot be resolved, the Local Issues Committee's decision on approval or denial of funds must be approved by a 2/3 vote of the committee.

### Timelines for Application Submission

A completed application must be submitted to Texas REALTORS® no later than 90 days prior to the date on which the first vote can be cast (either a municipal vote, or public vote in the case of a ballot measure). The Committee may, on a case-by-case basis and at its discretion, consider applications that do not meet the 90-day deadline.

### Staff Review

Before an application is submitted, or throughout the process, Texas REALTORS® staff can assist the applicant association in establishing clear benchmarks, campaign plans, budgets and timelines in order to ensure a winning strategy.

Upon receipt of a submitted application, Texas REALTORS® staff will review to determine if the application requires supplemental information, or is otherwise incomplete. In that case, a revised application addressing the additional information needed must be submitted before final review may occur. Based on the review, staff may recommend that the Committee approve the full grant request but make the funds available in increments as the campaign progresses.

### Committee Consideration

Once a completed application has been submitted and reviewed by Texas REALTORS® staff, the Local Issues Committee will take it up for consideration. Applicants must make a presentation and answer questions from the Committee during the review meeting. Grant requests in excess of \$150,000 must also be reviewed and approved by the Texas REALTORS® Leadership Team.

### Notification of Decision

Staff will notify the applicant of the Committee's decision following the Committee meeting, and again following the Leadership Team meeting, when necessary.

## Criteria for Evaluation

The Committee will consider the following criteria when making a decision on a Local Issues Fund application. The Committee will review applications with the objective of approving applications that satisfy one or more of the criteria under each of the following categories:

### Importance of a Public Policy Issue

1. The application concerns a local public policy issue on which Texas REALTORS® has adopted or is developing a position.
2. The local REALTOR® association has demonstrated that the local policy issue is of high importance to REALTORS®.
3. The issue is best addressed through public policy (e.g.: a law or regulation) rather than through actions by the private sector.

### Scope of Impact

1. The outcome of the issue will have an economic impact at the regional or local level.
2. The outcome of the issue will have a non-economic impact at the regional or local level.
3. The outcome of the issue will have a significant impact on real property rights, real estate brokering, or the legal and economic rights of the real estate industry.

### REALTOR® Involvement

1. The applicant association has taken an official position on the issue.
2. The application demonstrates that REALTORS® are actively involved in the issue.
3. The application demonstrates that REALTORS® are committed to the issue (e.g.: ongoing volunteer activity, participation in coalitions, contributions of local funds toward an issue).
4. Any required notifications have been delivered to impacted local associations per the association's Territorial Jurisdiction Policy.
5. Requests for funds and assistance will not be approved for issues that favor one local association at the expense of another.

### Winnability

1. The application demonstrates that the REALTOR® position on the issue is "winnable" (via polling, analysis, media coverage, support from elected leaders, etc.).
2. The application shows a viable strategy for addressing opposition.
3. Assistance from the Local Issues Fund is likely to make a significant difference to the outcome of the issue.
4. There exists a coalition in support of the REALTOR® position, and that coalition members have made a significant commitment (financial, volunteer time, etc.) to the issue.

### Community Support

1. There is broad-based community support for the REALTOR® position on the issue, extending beyond the housing industry.
2. There is evidence of strong REALTOR® coalition-building with diverse interest groups.

## Conditions on Approved Funds

Approved funding requests are subject to the following conditions:

### Deadline on Availability of Funds

Approved grant funds are available through the earlier of:

- the campaign end date, or
- December 31 of the year following the calendar year in which the grant was approved.

For a ballot initiative campaign, the campaign end date is considered to be 30 days after the election day on which the measure appears on the ballot.

For all other local campaigns, the campaign end date is considered to be 30 days after the date on which the issue is officially approved/disapproved by a policymaking body.

After the applicable deadline has passed, grant funds are no longer available for invoice payments.

### Disbursement of Funds

Texas REALTORS® Issues PAC will directly pay or reimburse the applicant association for costs related to the campaign as outlined in the application. In some cases, the Committee may approve a contribution to a coalition specific to the campaign. Texas REALTORS® Issues PAC does not issue lump-sum disbursements to the applicant association.

### Notice of Fund Commitments

The local entity must notify Texas REALTORS® Issues PAC within 5 days of commitment of any funds related to the campaign activity. Per state statute, committed funds must be reported to the Texas Ethics Commission within a timely manner, regardless of whether an invoice has been received or paid.

### Unused Funds

Any unused funds remaining as of the applicable deadline as defined above shall be released within Texas REALTORS® Issues PAC accounts and may be allocated to other grant applicants.

### Reports

The applicant association must submit a campaign progress report to the Committee (via staff liaison) within 30 days following the receipt of funds. A final report containing an accounting of funds and describing the issue outcome must be submitted to the Committee within 30 days after the conclusion of the campaign. The reports must include a written narrative of the campaign, as well as samples of any materials produced. The Committee at its discretion may require the applicant to provide additional reports.

## Advocacy Support

Many public policy issues may be resolved through simple grassroots advocacy techniques that do not require a full issues campaign. Texas REALTORS® staff and consultants can work with local association partners to implement no or low-cost advocacy efforts, including assistance with lobbying local officials, member mobilization, and simple media outreach.

In many circumstances, this level of advocacy effort will be effective in both resolving the policy issue and building relationships with local elected officials, government employees, and coalition partners. This long-term relationship-building will also be valuable as future policy issues arise, ensuring a strong and positive link between REALTORS® and their local government representatives.

**NOTE:** when considering this type of issues advocacy, early engagement by REALTORS® is of utmost importance for success. For example: if engagement is delayed until the time just before a council or public vote, chances for REALTOR® success will diminish. If there is an issue that is percolating in your area, contact TRIP staff as soon as possible.

### Consultation

A local association does not need to fill out a formal Local Issues Fund Grant Application to be considered for advocacy support. Texas REALTORS® staff will work with the local association to determine if the issue may be addressed through ground-level advocacy efforts, or if it may require a comprehensive grant through the Local Issues Fund (in that case, staff will work with the local association to complete an application that will be sent to the Local Issues Committee).

### Engagement

Texas REALTORS® staff can assist the local association in developing a winning strategy utilizing volunteer efforts, direct contact with elected officials, member mobilization, and other techniques. Texas REALTORS® can also provide ongoing advice and support (such as campaign planning, coalition building, messaging and media coordination, creative direction, etc.) as needed during the duration of the issue campaign.

### Reports

The local association must submit a final report describing advocacy efforts and the issue outcome to the Committee (via staff liaison) within 30 days after the conclusion of the campaign. The Committee at its discretion may require the applicant to provide additional reports.

### Learn More

Local associations may contact Texas REALTORS® at [TRIP@texasrealtors.com](mailto:TRIP@texasrealtors.com) to discuss upcoming issues and options for engagement.