

**WASHINGTON REALTORS®
REALTORS® POLITICAL ACTION COMMITTEE**

**PROCEDURES FOR
CANDIDATE INTERVIEWS/ENDORSEMENTS**

Preamble

The following policies and procedures have been developed to assist those involved in the candidate interview and endorsement process. Elections are a vital element in the legislative process. Therefore, a successful candidate interview/endorsement process can help ensure that those candidates who are elected will benefit from knowing the various REALTOR® positions, if not actually support them. This will enhance the association's ability to meet its legislative goals. The timing of the process is of the utmost importance. In order for an endorsed candidate to achieve the maximum benefit from a campaign contribution, it should be transmitted as early as possible in the current election cycle.

I. Interview Coordination

- A. Interviews with U.S. Senate, Congress, and Statewide candidates are coordinated by the RPAC Chair.
- B. Congressional, State Legislative candidate interviews are overseen by the trustees of the REALTORS® Political Action Committee. Each trustee of RPAC represents a WA REALTORS® district. However, the boundaries of many Congressional and Legislative Districts do not correspond with the boundaries of a WA REALTORS® District. Therefore, the Committee will designate which trustees are responsible for the coordination of the interview process in the various Congressional and Legislative Districts.
- C. Interviews of candidates for local offices are overseen by a District RPAC Trustee and coordinated by the political affairs committees from the appropriate local associations.

II. Interview Teams

- A. Conditions for Those Involved in the Interview Process
 - 1. As a condition of membership on an interviewing team and/or the REALTORS® Political Action Committee, each trustee shall agree as follows:
 - a. He/she shall not endorse any candidate in any race other than an RPAC officially endorsed candidate unless: He/she

makes it clear that each endorsement is in his or her capacity as a private individual and not as a REALTOR®, officer, director or member of a member association, or as a member of the committee.

2. Any member who is on a candidate's or the candidate's opponent's campaign steering or finance committee shall not be a member of the candidate interviewing team for that contest.
3. Any interview team member unable to attend ALL interviews for a particular position may not vote.
4. Any trustee of the REALTORS® Political Action Committee or any member of any interview team, once an endorsement decision is made, cannot publicly oppose that decision as a REALTOR® or on behalf of a REALTOR® organization. If they do, their actions may be considered cause for removal from RPAC and a prohibition from serving on future interview teams. Due process would be available before such removal or prohibition occurred. Trustees of RPAC shall sign an agreement at the time of their appointment and members of an interview team shall initial the candidate interview report/request for funds form that they will abide by this policy. Following due process, it is the responsibility of the Chair of the local interview team in the case of local, state legislative or Congressional races, or the Chair of RPAC in the case of statewide races, to enforce the policy.

B. U.S. Senate and Other Statewide Races

1. Composition of Interview Teams - The general composition of the Statewide Candidate Interview Team should include:
 - a. State Assn. President during the year of the election cycle.
 - b. State Assn. President-elect during the year of the election cycle.
 - c. Gov. Affairs Vice-President during the year of the election cycle.
 - d. Chairman, RPAC, during the year of the election cycle.
 - e. Gov. Affairs Vice-President-elect during the year of the election cycle.
 - f. Vice Chair, RPAC, during the year of the election cycle.

In addition, the Statewide Candidate Interview Team will consist of a representative from each of the ten (10) state WA REALTORS® Districts and one representative of WSCAR who are serving as RPAC Trustees during the election cycle. These representatives will be from the REALTORS® Political Action Committee. These representatives will be selected according to their availability to attend scheduled interviews and by a majority decision of the following: WA REALTORS® President, WA REALTORS® President-elect, Government Affairs Vice President, and the Chairman of the REALTORS® Political Action Committee.

2. The statewide candidate interview team is a stand-alone body with its actions reported to the REALTORS® Political Action Committee for possible funding of candidates, and to the entire membership of the association with a rating and any endorsements of the statewide candidates.

C. Congressional, State Legislative, and Local Office Races

1. General Composition of Interview Teams

a. Selection Criteria:

- i. It is highly recommended that participants shall be selected from RPAC investors of at least \$100 in the current year.
- ii. They should represent a broad political spectrum.
- iii. The team must consist of a minimum of three (3) or a maximum of nine (9) interviewers. However, in order to assure an opportunity for at least one person from every Association to participate, the number may have to exceed 9 in some cases.
- iv. Participants must be registered voters, if United States citizens. *[See section II.C.2.b. for multijurisdictional races.]*

b. Membership Categories:

- i. REALTORS® Political Action Committee and/or local RPAC Chair(s)
- ii. Local Political Affairs Committee members and/or Local Association Officers
- iii. Local Legislative Committee or Subcommittee members
- iv. The Washington State Commercial Association of REALTORS® and the greater Portland/Vancouver Commercial Association of REALTORS® members are eligible to serve on candidate interview teams provided they reside within the candidate's district and

meet all the criteria listed in II. C.1.a. and b. of these policies and procedures.

- v. Local and state association staff are not eligible to serve on an interview team except in the case of judicial races, if they are a member of the Washington State Bar Association and RPAC.

2. Lead Associations and Composition of Multi-Jurisdictional Interview Teams.

- a. A lead association should be responsible for interviews in each Legislative, Congressional, or local office district. During a legislative election year, RPAC should determine the lead associations not later than the April meeting of WA REALTORS® RPAC meeting. (See meeting schedule below.) However, alterations can be made after discussion and input by the appropriate local associations. As a general rule, the lead association should be the one with the largest population in a Legislative, Congressional, or local office district, UNLESS there is agreement among the other associations on the selection of another lead association.
- b. The composition of multi-jurisdictional candidate interview teams will be proportionate based on population of registered voters. (For example, if "XYZ" county has 20 percent of the population in a Legislative or Congressional District; "MNO" county has 30 percent; and "ABC" county has 50 percent, then the team would consist of 2 from "XYZ"; 3 from, "MNO"; and 5 from "ABC.") However, team compositions may differ, if the jurisdictions involved are in agreement with the alternative. Regardless, each association with population in a district must be represented on a team UNLESS they fail to appear at an interview.
- c. If a local association does not wish to participate in a multi-jurisdictional interview team, written notification should be provided the lead association prior to the interview. A copy should be attached to the candidate interview report/contribution request form, which is submitted to RPAC.
- d. Realizing the need to participate and have expertise in judicial races, staff who are members of the Washington State Bar Association and member of RPAC may participate as a voting member in judicial candidate interviews.

III. Endorsements and Candidate Contribution Requests

A. Recommended Timelines for Interviews

1. In January of election years, the REALTORS® Political Action Committee should determine: the April date for consideration of Congressional, Statewide, State Legislative early endorsements and opportunity races (see 4a. below); the May dates for WA REALTORS® District meetings with local associations (see 4 b. below); and the coordinators for the various Legislative and Congressional Districts. (Note: Following this meeting, WA REALTORS® staff will notify appropriate associations regarding the May meeting dates; and who will be their coordinators.)
2. No later than April of election years, the REALTORS® Political Action Committee meets to determine recommendations for Congressional, Statewide and State Legislative early endorsements and opportunity races. Note, however, interviews of Federal candidates may be scheduled as soon as viable candidates have been identified in order to meet National RPAC deadlines.
3. In May of election years, WA REALTORS® District meetings are held involving local association leadership and/or local political affairs committee representatives to confirm dates for interviews; review the REALTORS® Political Action Committee Policies and Procedures and Bylaws and receive State Legislative early endorsements or opportunity race recommendations.
4. In January of election years, the REALTORS® Political Action Committee shall determine and then publish its meeting schedule for the year. Included with this schedule shall be the deadlines for the transmittal of candidate requests. The schedule should generally adhere to the following:
 - a. APRIL and MAY: Local associations ratify Congressional and State Legislative early endorsements and opportunity races; dates for interviews; and members to serve on interview teams.
 - b. JUNE: The REALTORS® Political Action Committee takes action on funding requests for early endorsements and opportunity races; ratifies interview dates and reviews composition of interview teams.
 - c. JULY and through the week after filing (usually the second week of July): single and multi-jurisdictional interviews are held.

- d. Late July: The REALTORS® Political Action Committee meets to act upon funding requests and possible independent expenditures for the Primary.
- e. Early SEPTEMBER: If one or more of their recommended candidates lost in the Primary, local association interview teams should meet, at which time Primary results should be reviewed and recommendations made to the REALTORS® Political Action Committee.
- f. LATE-SEPTEMBER: The REALTORS® Political Action Committee takes action on General Election requests for funding and independent expenditure recommendations.
- g. NOVEMBER and DECEMBER: The REALTORS® Political Action Committee takes action on post-election debt reduction funding requests, if any.

B. Interview Location

- 1. If space is available and facilities are adequate, the interview should be held at an association office. (Note: If interviews are scheduled in a public place - e.g. a hotel, restaurant, etc. - be aware that some candidates may not enter a non-union establishment and all candidates should be given the opportunity to be interviewed.
- 2. The interview room should be large enough to comfortably hold the interview team, the candidate, and at least one member of the candidate's staff.
- 3. A separate waiting area should be available outside the interview room.

C. Interview Procedures

- 1. At the earliest time possible (e.g. when an announcement appears in the local newspaper), contact candidates and invite them to participate in an interview. Confirm arrangements by letter.
- 2. With the confirmation letter, provide candidates with a "Candidate Biographical Data Report Form", requesting they be completed and returned before the interview. Ask for whatever specific information your interview team deems appropriate. Also, provide the candidate with a list of topics to be included in the interview.

Background information on pertinent issues should also be sent to the candidate.

3. Prior to the first appointment, the interview team should meet to review the REALTORS® Political Action Committee policies, determine who will chair the interview, and who will ask which questions. (Note: All members of the interview team should be encouraged to ask at least one question.)
4. Duly constituted interview teams; state and/or local staff; the candidate, and if the candidate requests, one member of the candidate's staff, should be the sole occupants in the interview room. It is recommended that no other audience be present.
5. Allow approximately 30 minutes per interview and additional time (10 minutes) between interviews for initial evaluations.
6. Be courteous, not argumentative, during the interview. This is an open dialogue designed to enable candidates and REALTORS® to learn from and about each other.
7. Generally, open-ended questions should be used. However, the same questions should be asked of all candidates running for office. Further, all questions must be industry related. The interview questions should not be shared with the candidates prior to the interview. (Note: A recommended questionnaire will be prepared and distributed by WA REALTORS®' Government Affairs Department.)
8. Conclude the interview within the prescribed 30 minutes. Thank the candidate and advise him/her that he/she will be notified of the endorsement as soon as all the candidates have been interviewed and all procedures completed.
9. It is recommended that the interviews not be tape recorded. However, if they are, it must be done with the candidate's permission prior to the interview. Deliberations of the interview team are to be kept confidential.
10. After all interviews are concluded, the interview team should meet to determine its endorsements, if any. When making candidate endorsement decisions, the interview team shall consider:
 - a. Voting record
 - b. Advice of staff (including lobbyist assigned to work that level of government) and RPAC Trustees

- c. Knowledge of issues
- d. Position philosophy
- e. Image
- f. Campaign organization strength
- g. Campaign strategy
- h. Interest in receiving endorsement, and if so, interest in funding

D. Statewide Candidates

1. The Statewide Candidate Interview Team is responsible for determining endorsement recommendations and conveying them to the REALTORS® Political Action Committee for funding decisions in the following races:

Governor	United States Senator
Lt. Governor	Supreme Court Justices
Secretary of State	Attorney General
State Auditor	Insurance Commissioner
State Treasurer	
Commissioner of Public Lands	
Superintendent of Public Instruction	

2. The Statewide Candidate Interview Team is also responsible for rating the candidates on a scale of 0-100. This rating shall primarily take into account the candidates responses and positions on REALTOR® issues addressed in the interview questionnaire; their background and experience; and electability. RPAC Trustees shall establish the process for the release of the ratings determinations to the WA REALTORS® membership and public.
3. Local funds can only be used for local candidate funding and local independent expenditures.
4. If a local association wishes to contribute to a statewide candidate not included in the statewide interview process, they may petition the Statewide Candidate Interview Team to interview the candidate. If the Statewide Candidate Interview Team still determines not to interview the candidate, no further endorsement action may be taken by the local association.

5. Funding requests to NAR for a U.S. Senate (and/or Congressional) candidate shall be submitted in a timely manner. All policies and procedures shall be followed.

E. Early Endorsements and Opportunity Races

1. Early endorsements of incumbents and "opportunity" races are within the policies and procedures of the REALTORS® Political Action Committee, provided that the following procedures are met regarding Congressional, Statewide, State Legislative and local candidates: (Note: "Opportunity" races involve incumbents or challengers who may need special help for re-election or election. This special help may include, but not be limited to, making phone calls, sending out direct mail, posting yard or reader board signs, going door-to-door, hosting events, or contacting absentee voters.)
 - a. At a special meeting following the regular legislative session in an election year, recommendations for early endorsements in Congressional and State Legislative races will be made. All early endorsement and/or opportunity race requests shall be submitted in writing, by an RPAC Trustee, to the RPAC Chair. The request shall be delivered to the RPAC Trustees 10 days prior to the vote taking place.
 - b. In multijurisdictional districts, recommendations for early endorsements shall be submitted to a dually constituted interview team for the jurisdiction in question for their ratification *[See section II.C.2.b. for multijurisdictional races.]*
 - c. Regarding opportunity races for Congressional and/or State Legislative contests, a plan of action must be submitted by the local association(s) submitting the opportunity race request.
 - d. Determinations for contributions as recommended by the appropriate local associations shall be made by the REALTORS® Political Action Committee in early summer of the election year.
 - e. When special elections are called in a non-election year (i.e., odd year), the above timeline will be adjusted as necessary.
 - f. Local associations may also submit requests for early endorsements for local and/or opportunity races provided appropriate guidelines are followed.

F. Candidate Endorsements

1. Candidate interview teams (both single and multi-jurisdictional) are responsible for determining the candidate endorsement recommendations and for conveying the recommendation to the REALTORS® Political Action Committee for contributions.
2. Multiple endorsements and contribution requests are generally discouraged. However, there may be specific rationale for making these types of endorsements and requests that must be shared with the RPAC Trustees.
3. Until notification has been given to all interviewed candidates, there shall not be an announcement of endorsement.

G. Candidate Contribution Requests

1. Signed candidate contribution request forms (SEE FORM ATTACHED) shall be submitted to the REALTORS® Political Action Committee by the interview team leader in accordance with the candidate contribution request funding deadline schedule (see meeting schedule in III. A.). The interview team leader and the appropriate trustee of the REALTORS® Political Action Committee, if the contest is a congressional or local race; or appropriate trustee of the REALTORS® Political Action Committee if the contest is a state legislative race, will sign the candidate contribution request forms which will contain a list of all those involved in the interview process.
2. To ensure the proper handling of paperwork and rapid determination of a contribution, interview teams are strongly urged to have at least one trustee of the REALTORS® Political Action Committee present at the interviews.
3. If an interview team fails to submit a candidate contribution request form for a given race in accordance with REALTORS® Political Action Committee pre-election deadlines for the transmittal of forms or does not conduct an interview, or if a dispute exists in a multi-jurisdictional situation, then Staff shall notify the REALTORS® Political Action Committee who shall make funding decisions. These decisions may include "non-involvement" in a Primary or General Election contest based upon a conscious decision by a local association to not participate.
4. RPAC will handle multiple contribution requests for the same contest on a case-by-case basis. Regardless, the appropriate guidelines for the decision process must be followed (e.g. timelines;

interviewing of candidates; paperwork, etc.). Additionally, the recommendation for multiple contributions in the same contest must be accompanied by a statement outlining the rationale for the request.

5. The REALTORS® Political Action Committee will expend funds for a state candidate campaign deficit provided that the dollar amount expended is within the governmental regulatory guidelines and provided that the interview team for that particular contest has submitted a properly completed candidate contribution request form. Deficit reduction requests are subject to Committee approval.
6. Federal Political Coordinators should contact local associations in the district, members of their contact teams and the WA REALTORS® President to provide them an opportunity to participate in in-state events.

IV. Approval of Candidate Contribution Funding Requests

- A. Interview team leaders shall submit candidate funding requests to the Washington REALTORS® staff immediately following an endorsement determination. (Note: Regarding statewide and congressional races, staff shall fax a courtesy copy of the endorsements to the REALTORS® Political Action Committee.)
- B. Requests for local contests: If the policies and procedures have been properly followed, the requests are granted.
- C. Requests for state and federal contests: If the policies and procedures have been properly followed, the endorsement documents are submitted to the REALTORS® Political Action Committee, and then, if a federal contest, to NAR/PAC.
- D. Failure to follow these REALTORS® Political Action Committee Policies and Procedures on a given contest may result in the Committee ruling that a request for funds involving that contest be denied.

V. Contribution Presentation

- A. Appropriate REALTORS® Political Action Committee Trustees and Key Contacts or FPC's should coordinate contribution presentation meetings with candidates. Representatives from the various associations located in the legislative or congressional district should be invited to participate.
- B. Funds shall be disbursed to candidates within 10 days of check availability.

VI. Approval of Funding for Independent Expenditures (IE's)

- A. An Independent Expenditures (IE) Committee, made of 6 members, plus two (2) staff appointed by the CEO, will be created annually. The five Committee members will include the RPAC Officers and two RPAC Trustees appointed by the RPAC Chair. The Vice-President of Government Affairs will serve as chair of the IEC as a non-voting chair. Staff will be non-voting members. Other than the RPAC Officers, the committee members will remain anonymous until the completion of the election cycle where the IE has taken place.
- B. Any member of the IE Committee serving as an "Agent of a campaign" (anyone who can make or change a decision of a campaign) must be excused from serving on the IE Committee and a replacement will be appointed by the RPAC Chair.
- C. All members of the IE Committee, RPAC trustees, and staff members are required to sign a confidentiality affidavit. In addition, all members involved in the IE process are required to sign a confidentiality affidavit.
- D. RPAC Trustees will meet in Executive Session to receive IE requests and determine the total amount of independent expenditures to be allocated. RPAC Trustees will be required to sign a confidentiality form.
- E. The IE Committee will meet in executive session following the RPAC Trustee Committee meeting and determine the IE recipients, and the amounts to be allocated to each recipient, within the total allocation approved by the RPAC Trustees.
- F. Independent Expenditures in local races require the following:
 - 1. The candidate must have been endorsed by RPAC for the position they are seeking.
 - 2. Before consideration of conducting Independent Expenditures, the local association shall consult with the WA REALTORS® Government Affairs Director to identify opportunities and determine potential campaign plan.
 - 3. The local association shall authorize funding from their local RPAC account to be used for Independent Expenditures and notify the WA REALTORS® Government Affairs Director at least one month before the election in which the funds will be expended by submitting the appropriate form provided by the state.
 - 4. The local association shall designate one representative to work with the WA REALTORS® Government Affairs Director.

5. The WA REALTORS® Government Affairs Director, working with the local representative, will coordinate all aspects of Independent Expenditures (including design, placement, distribution, etc.).
6. Before making any expenditure of funds, the WA REALTORS® Gov't. Affairs Director must ensure all PDC reporting requirements will be satisfied in a timely manner to avoid a violation of the law.
7. Once all provisions for compliance with PDC reporting requirements are in place and approved by WA REALTORS® Gov't. Affairs Director, funding for the IE may be released and expended.