

# ANNUAL REPORT

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**2022**  
EDITION

# LETTER FROM THE CEO

2022 was another stellar year for membership. SCCAOR continued to build on the momentum we had last year by adding over 360 new members and surpassing 6,589 REALTOR® members and another 330 Affiliates. Once again, we grew at a much faster rate than most other associations across the state. Our total membership is approaching 7,000 for the first time in over a decade.

President Lisa Faria had several lofty strategic initiatives this year. We leaned in hard to NAR REALTOR® Safety Month with a nine-month campaign directed at the membership that included over 50 social media posts, four blog posts, and five classes. Lisa also had us take on the NAR Commitment to Excellence (C2EX) Challenge. Until this year, we only had eight members that had received their C2EX endorsement. We ended the year with 42 new C2EX-endorsed members.

2022 was also a big year for our Government Affairs Department. Our volunteers became politically engaged on so many different levels - from hosting fundraisers and meet-and-greets, to stuffing envelopes and phone banking, to walking precincts and knocking on doors. Through our increased political engagement, we increased our REALTOR® Action Fund (RAF) Major Donors from 27 to 40 members and created recognition opportunities at our events.

We continued our efforts from last year to stay engaged with our Broker community. Lisa helped us establish an Office Liaison Program that essentially gave SCCAOR an inside presence in our Brokers' offices. We hosted monthly briefings with the liaisons and provided custom-tailored shareable assets.

Our Diversity, Equity, and Inclusion Committee (DEI) was also quite active. We continued to engage with our Diversity Partners through Quarterly Roundtable lunches to discuss opportunities to collaborate, sync up event schedules, and share SCCAOR resources. This continued collaboration resulted in several members of our Diversity Groups participating on our Nominating Committee. In addition, our DEI Committee helped craft an Inclusivity Statement, modeled after C.A.R.'s, that is on every Board Agenda and read at every SCCAOR meeting.

As part of our commitment to homeownership, the Foundation has launched the Down Payment Assistance Fund, now accepting intake forms from first-time homebuyers.

Internally, we made major technological improvements that allow us to serve our members better. The most significant technology project for the year was migrating over to our new Association Management Platform, converting from NetForum to GrowthZone.

For all the progress that we made as an organization in 2022, our team is looking forward to further improving our association in 2023. We will continue to support our members to the best of our ability, and further develop an association that is welcoming, dynamic, and dedicated.



Neil V. Collins

CEO Santa Clara County Association of REALTORS®

# VISION & MISSION

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To be the most credible source  
for real estate related issues  
in the markets we serve.

SCCAOR exists to meet the  
business, professional, and political  
needs of its members and to  
promote and protect private  
property rights.

## CORE VALUES

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- **Welcoming**
  - Promoting a positive and respectful environment where everyone feels they belong.
- **Dynamic**
  - Innovative and solution-oriented industry leaders empowering each other to succeed.
- **Dedicated**
  - Committed to excellence in everything we do.

## STRATEGIC PLAN

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- ✓ **MEMBER SERVICE & SATISFACTION**  
Engage our members and provide them the resources and opportunities to improve their business.
- ✓ **ADVOCACY FOR REALTORS® & PROPERTY OWNERS**  
Energize our members & their clients to actively participate in government affairs issues that affect the real estate profession.
- ✓ **EDUCATION & PROFESSIONAL DEVELOPMENT**  
Provide members the means to attain a minimum standard of excellence by developing core competencies and providing business specialty training.
- ✓ **PUBLIC & COMMUNITY RELATIONS**  
Increase public understanding of the value and contribution of REALTORS® within our communities.
- ✓ **ORGANIZATIONAL EXCELLENCE**  
Maximize member investments to deliver remarkable services and programs.

# 2022 LEADERSHIP TEAM

## OFFICERS



**Lisa Faria**  
President



**William E. Chea**  
President-Elect



**Kraig Constantino**  
Vice President



**Bill Rehbock**  
Treasurer

## DIRECTORS



**Ryan Alter**



**Jen Beehler**



**Lori Robitaille Biasca**



**Brad Gill**



**Doug Goss**



**Gustavo Gonzalez**



**Gene Hunt**



**Kelly Hunt**



**Sandy Jamison**



**Amber Martinez**



**Elizabeth Monley**



**Karen Nelsen**



**John Scaglione**



**Rick Smith**



**Jenny Zhao**



# OUR MEMBERS



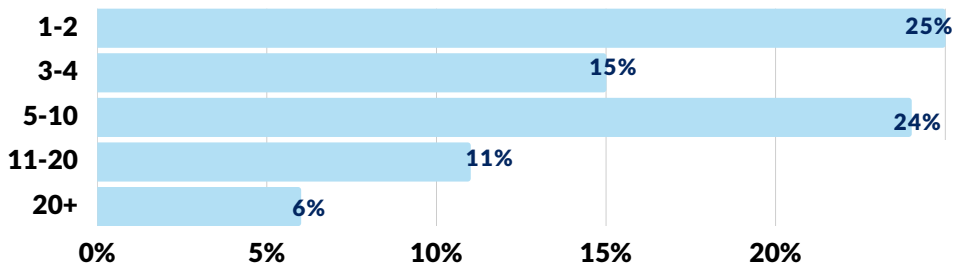
**6,919 TOTAL MEMBERS**

6,589 REALTORS®  
330 AFFILIATES

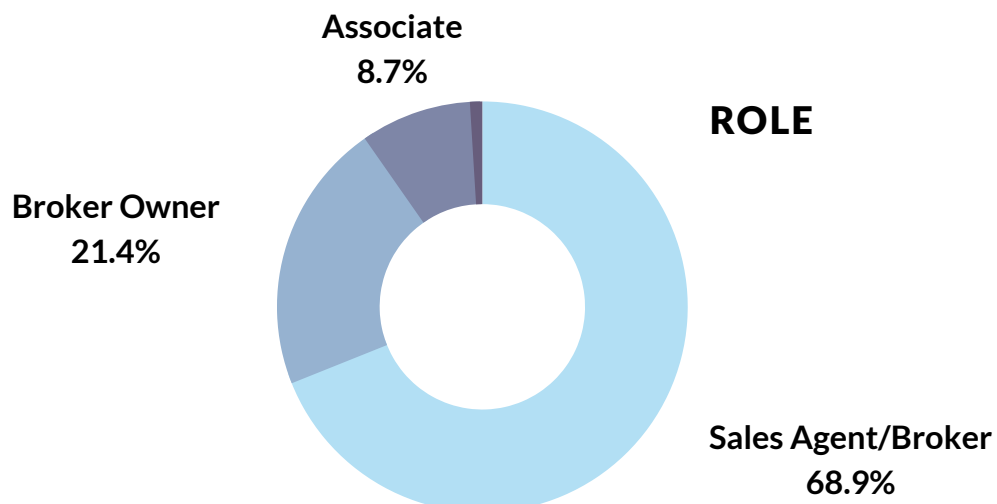
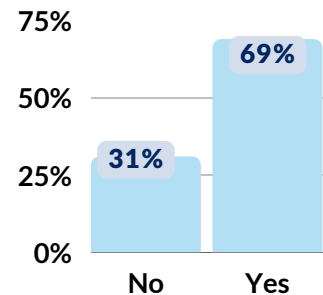
**76%**

Percentage of SCCAOR members who consider real estate their full-time job

## TOTAL TRANSACTIONS IN 2022



## MEMBER OF A TEAM?



Data based on 2022 SCCAOR Annual Member Survey

# ADVOCACY

## ADVOCATING FOR OUR MEMBERS

SCCAOR Advocacy champions REALTOR® Party values on behalf of our members. We achieve this by advocating for our members' business rights, private property rights, homeownership, and increasing housing supply and affordability. The REALTOR® Party speaks with one voice to advance candidates and public policies that build strong communities and promote a vibrant business environment.

Our Advocacy team consists of our professional government affairs team that receives direction from our Local Government Relations Committee and Local Candidate Recommendation Committee. Our passionate SCCAOR members respond to our Call for Actions, vote for REALTOR® Party champions, and support our grassroots initiatives to ignite positive change.

## 2022 ADVOCACY HIGHLIGHTS

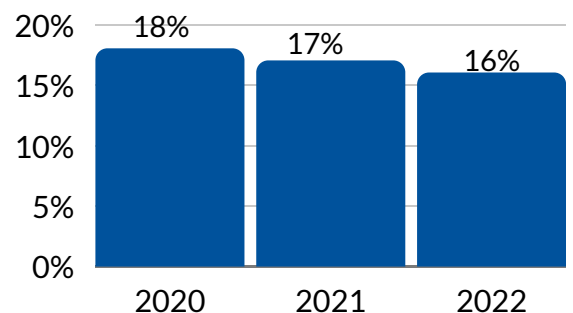
- Secured approximately \$2,000,000 in NAR & C.A.R. assistance to support pro-business, pro-housing, and pro-property rights candidates in local elections.
- Mobilized over 100 REALTOR® volunteers to walk precincts, phone-bank, financially contribute, and/or mail campaign materials for SCCAOR-endorsed candidates.
- Hosted a RAF Major Donors reception and a Government Affairs volunteer recognition reception.
- SCCAOR entered a new era of never-before-seen political impact, influence, and involvement that put the REALTOR® community on the local political landscape as a force and interest to be seen, heard, and taken seriously to the benefit of our industry and private property rights.

## 2022 VICTORIES

- Propelled Matt Mahan against all political betting odds into the San Jose Mayor's Office after the most expensive, divisive, and contested Mayoral race in San Jose history.
- Flipped San Jose Council District 7, seating SCCAOR-endorsed Bien Doan on the City Council.
- In every city with a mayoral election this cycle, SCCAOR's endorsed candidate won (Morgan Hill, Milpitas, San Jose, Santa Clara).
- Pro-housing majority secured in Milpitas, Morgan Hill, & Gilroy.

## REALTOR® ACTION FUND

Participation by SCCAOR Members



# MEMBER SERVICES

## EDUCATION



**64**  
IN-PERSON &  
VIRTUAL CLASSES



**2000+**  
TOTAL  
ATTENDANCE

## MEMBER BENEFITS



### Tech Helpline

A free unlimited tech support service available to all members. Tech Helpline analysts can even connect remotely to your computer and fix it for you!



### REALTOR® Store

Tons of great real estate products offered at discounted member-only pricing. Online shopping and curbside pickup available.



### In-office Studio

Keep your business profile pictures up to date with a FREE headshot and/ or video resume!



### Supra Access

Receive guided assistance with the eKey and lockbox activation.



### REALTOR® Advocacy

Learn how SCCAOR assists in protecting property rights and promote policies to increase homeownership!

## PROFESSIONAL STANDARDS



SCCAOR's Dispute Resolution Committee volunteers and staff are some of C.A.R.'s most recognized and respected representatives.

In 2022, SCCAOR received 17 new Ethics Disciplinary complaints. Two additional 2019 complaints were removed from abeyance and were processed and closed. One disciplinary complaint was processed for the Santa Cruz Association of REALTORS®. Three complaints were converted to Citations. There were two Broker-to-Broker meetings with no complaint filed for either case. There were four withdrawals that the Grievance Committee dismissed. Four complaints that were similar in nature were combined and two hearings were held instead of four hearings. The Professional Standards Committee officiated 10 disciplinary hearings. There was one request for a Director's Review. The Grievance Committee reviewed 19 complaints.

A mediation request was received and rejected as there was no exhibit or evidence submitted. Fee was returned.

Two Arbitrations were received and withdrawn by the complainants.

Christine Borg, Professional Standards Coordinator, assisted with providing answers to process questions for the Professional Standards Coordinator at the Central Valley Association of REALTORS®.

# SANTA CLARA COUNTY REALTORS® FOUNDATION THE CHARITABLE ARM OF SCCAOR



## Bringing REALTORS® together to help families, revitalize our communities, & assist in disaster relief

The Santa Clara County REALTORS® Foundation, the charitable arm of SCCAOR, provides an avenue for organized real estate to offer direct assistance where it is most needed - back into the communities we serve.

We work to create a strong community, connect those who care with those making a difference, and support housing issues over the long-term.

## 2022 BY THE NUMBERS



**\$131,054**

Total grants & donations distributed



**15**

Local organizations supported  
plus eight local youth received  
scholarships



**\$30K**

in Down Payment Assistance grants

## ORGANIZATIONS SUPPORTED

- Alzheimer's Association
- Chicago Title Company for Make-A-Wish®
- Community Solutions
- Community United San Jose
- Katherine R. Smith Elementary School
- Kinship, Adoptive and Foster Parent Association
- Magical Bridge Foundation
- Martin-Fontana Parks Association
- Rebekah Children's Services
- Rebuilding Together, Silicon Valley
- Sacred Heart Community Service
- San Jose District 2 Pocket Park
- St. Catherine's Reach Out
- St. Joseph's Family Center
- Sunday Friends Foundation

In addition to supporting local organizations with grants, our Foundation gives back to the community through our volunteer efforts.



The South County REALTORS® Alliance (SCRA), a chapter of SCCAOR, raised funds through their CanTree initiative and funded \$28,500 in scholarships to 27 students.



# COMMUNICATIONS

## SOCIAL MEDIA STATS

|           | Followers<br>at end of 2021 | Followers<br>at end of 2022 | % change |
|-----------|-----------------------------|-----------------------------|----------|
| Facebook  | 3500                        | 4788                        | +37%     |
| Twitter   | 5426                        | 5454                        | +1%      |
| Instagram | 1375                        | 1786                        | +30%     |
| LinkedIn  | 346                         | 469                         | +36%     |
| YouTube   | 371                         | 423                         | +14%     |

## SCCAOR STUDIO



**251**  
MEMBER  
HEADSHOTS  
COMPLETED



**29**  
MEMBER  
VIDEO RESUMES  
COMPLETED

**FOLLOW  
OUR  
SOCIALS**

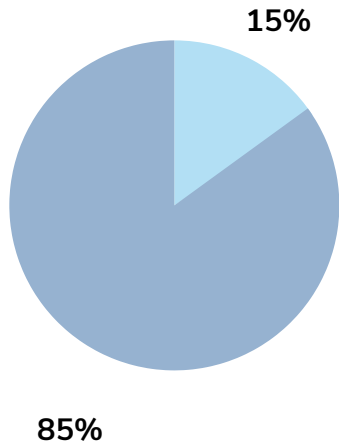


# FINANCIALS

## INCOME STATEMENT (JANUARY 1- DECEMBER 31, 2022)

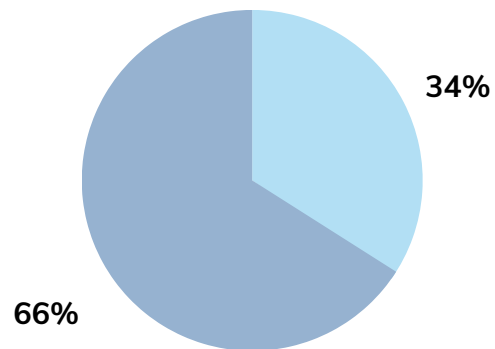
### Revenue

|                        |                     |
|------------------------|---------------------|
| ■ Dues and Fees        | \$ 2,683,012        |
| ■ Activities & Other   | \$ 464,467          |
| <b>Total Revenues*</b> | <b>\$ 3,147,479</b> |



### Expenses

|                        |                     |
|------------------------|---------------------|
| ■ Program Expenses     | \$ 2,144,412        |
| ■ Management & General | \$ 1,091,777        |
| <b>Total Expenses</b>  | <b>\$ 3,236,189</b> |

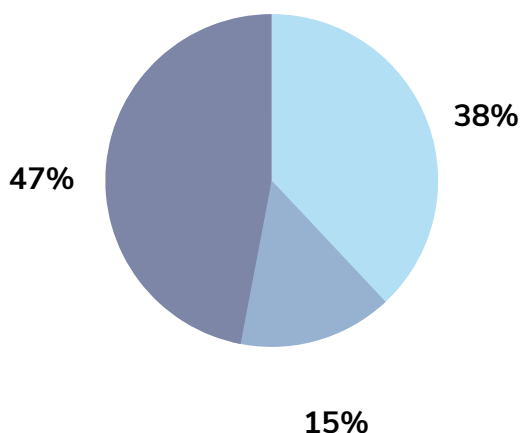


\*Revenue does not include gain/loss from MLS Investment to reflect SCCAOR operating performance

## STATEMENT OF FINANCIAL POSITION (DECEMBER 31, 2022)

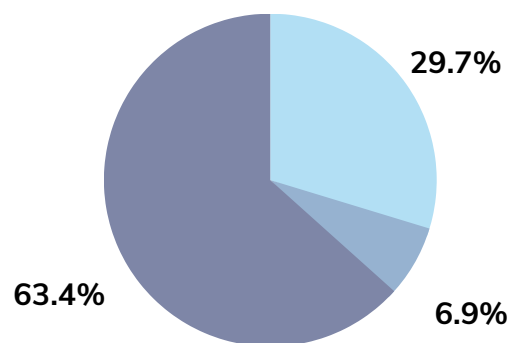
### Assets

|                        |                      |
|------------------------|----------------------|
| ■ Current Assets       | \$ 5,014,334         |
| ■ Long Term Assets     | \$ 1,953,553         |
| ■ Property & Equipment | \$ 6,193,510         |
| <b>Total Assets</b>    | <b>\$ 13,161,397</b> |



### Liabilities

|   |                      |
|---|----------------------|
| ■ Current Liabilities                     | \$ 3,890,280         |
| ■ Long Term Liabilities                   | \$ 866,190           |
| ■ Net Assets                              | \$ 8,404,927         |
| <b>Total Liabilities &amp; Net Assets</b> | <b>\$ 13,161,397</b> |



# 2022 AWARD RECIPIENTS



**Doug Goss**

REALTOR® OF THE YEAR



**Kevin Barrett**

AFFILIATE OF THE YEAR



**Anna Truong Lopez**

VOLUNTEER OF THE YEAR



**Alma Moreno**

TRACEY LEE EXCELLENCE IIN  
SERVICE AWARD



**Jenny Zhao**

GOVERNMENT AFFAIRS  
CHAMPION OF THE YEAR



**Kelly Hunt**

GOVERNMENT AFFAIRS  
CHAMPION OF THE YEAR



**Mickie Constantino**

BYRON BRAWLEY AWARD



**Barbara Lymberis**

OUTSTANDING SERVICE &  
LEADERSHIP AWARD



**Jen Beehler**

PRESIDENT'S CHOICE AWARD



# 2022 CORPORATE SPONSORS



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Thank you 2022 Corporate Sponsors!



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