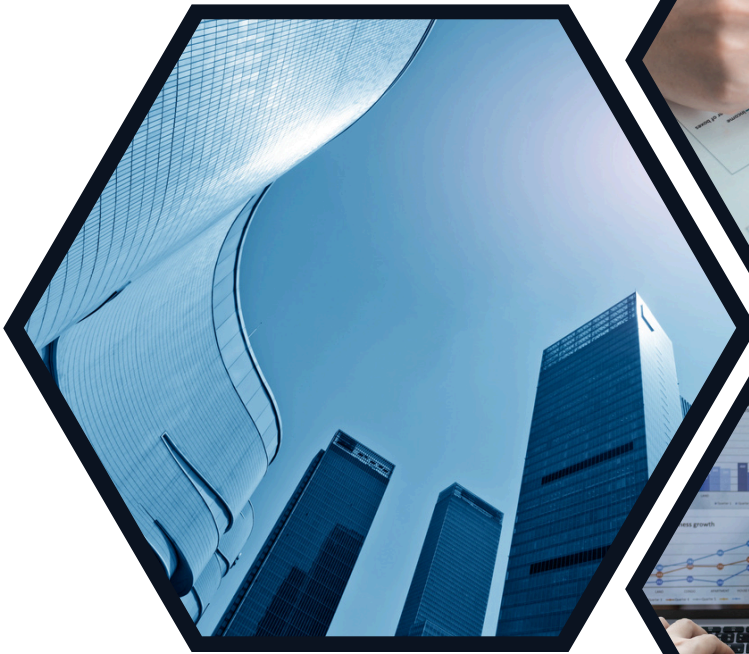


# 2023

## Annual Report

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# Letter From The CEO

Dear Members,

Despite initial concerns regarding membership numbers, our strategic budget approach allowed us to maintain essential member services while preparing for a slight decline in Primary and Secondary Memberships. We successfully welcomed numerous members from surrounding associations, with a remarkable 94% renewal rate among transfers from 2022.

We continued our commitment to member engagement and community service through initiatives like the “REALTORS® Do More,” campaign and supporting NAR REALTOR® Safety Month. Our efforts also led to a significant increase in RAF Major Donors, achieving over 50, marking a 25% growth from last year.

Our Government Affairs team had notable success, particularly in defeating the Community Opportunity to Purchase Act (COPA) and organizing a successful Legislative Day at the capital. Additionally, we hosted our first-ever Real Awards event, celebrating top producers and raising funds for Down Payment Assistance grants.

SCCAOR expanded professional development opportunities by hosting a record number of agents for NAR Designations and offering new pricing models to enhance participation in classes. Our DEI initiatives thrived, including a Fair Housing event featuring esteemed speakers and our inaugural Down Payment Assistance Fair, which attracted over 100 attendees.

Our Foundation distributed \$70,000 in grants to assist first-time home buyers and engaged in numerous community support activities, all made possible through generous member contributions.

As we conclude 2023, our strategic planning, led by C.A.R. CEO John Sebree, positions us well for future growth. Through innovative teamwork and adaptability, SCCAOR continues to thrive in the evolving real estate landscape.

Thank you for your continued support and commitment to our community.

Neil V. Collins  
Chief Executive Officer

# STRATEGIC PLAN

## MISSION



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

## CORE VALUES

### 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 2024-2026

## Organizational Excellence

- Maintain a culture that fosters inclusiveness and provides “best in class” resources and services to our members.
- Strengthen and grow relationships and influence within our Broker community.
- Cultivate new leaders to ensure the long-term strength of the Association.
- Elevate our Association by delivering services in a fiscally responsible manner and constantly focusing on and adapting to industry changes.

## Advocacy

- Interact with the public, media, and elected officials as the leading advocate for private property rights and real property ownership in the communities we serve.
- Partner with other industry groups, coalitions, and the public to ensure a more powerful voice on legislative, regulatory, and economic development issues.
- Utilize REALTOR® Party programs to educate and engage members on the importance of calls for action and investing in the REALTOR® Action Fund.
- Recruit, elect and empower candidates who embody the values of the REALTOR® Party.

## Professional Development

- Deliver high quality career advancing educational opportunities.
- Uphold the REALTOR® Code of Ethics and foster a culture of integrity, professionalism, and respect.
- Honor the Fair Housing Act by advancing professionalism through educational opportunities
- Embrace Diversity, Equity and Inclusion in all programs and services.

## Community Outreach

- Be the “Voice for Real Estate” in our communities.
- Promote the value of Santa Clara County Association of REALTORS® as a partner in stimulating economic development and building stronger communities.
- Engage in activities that have a positive impact on our communities.



# 2023 LEADERSHIP TEAM

## OFFICERS



**William E. Chea**  
President



**Michelle Perry**  
President-Elect



**Kraig Constantino**  
Vice-President



**Bill Rehbock**  
Treasurer

## DIRECTORS



Ryan Alter



Jen Beehler



Joe Brown



Lisa Faria



Terese Ferrara



Doug Goss



Gene Hunt



Kelly Hunt



Sandy Jamison



Karen Nelsen



Rick Smith



Margo Sparks



Laura Welch



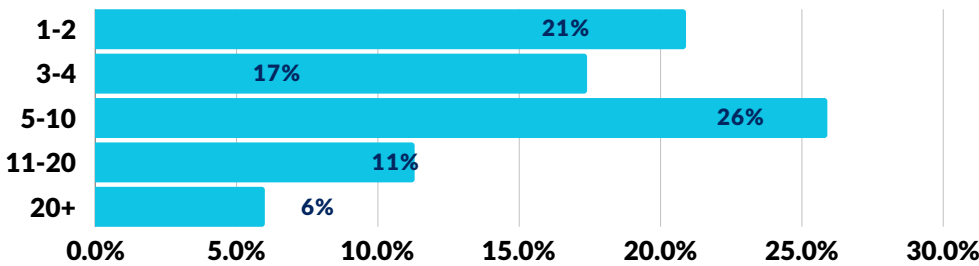
Jenny Zhao



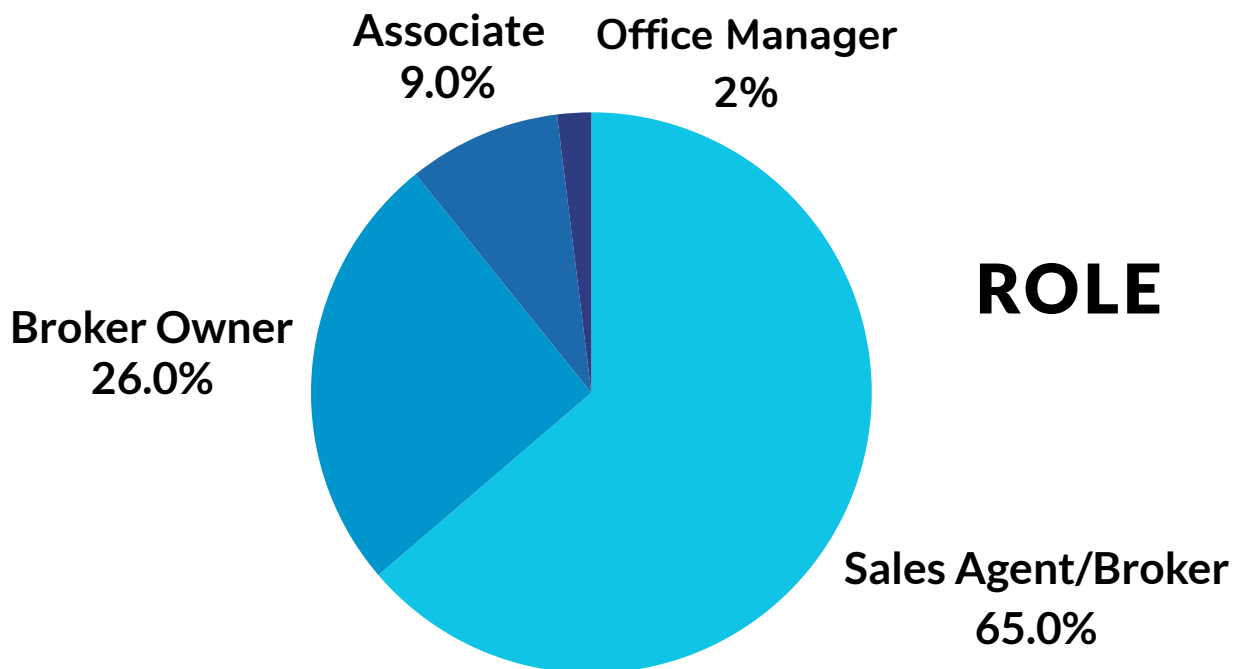
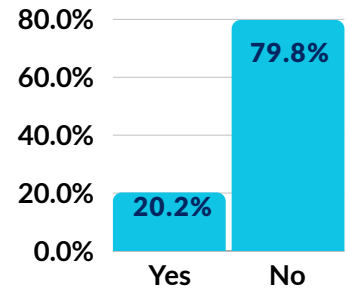
**6,684 TOTAL MEMBERS**  
 6,331 REALTORS®  
 353 AFFILIATES

**76.2%**  
 Percentage of SCCAOR members who consider real estate their full-time job

**TOTAL TRANSACTIONS IN 2023**



**MEMBER OF A TEAM?**



\*Data From 2023 Member Survey



## **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.

## **2023 ADVOCACY HIGHLIGHTS**

- SCCAOR was heavily engaged in the San Jose City Council's discussion about the Community Opportunity to Purchase Act (COPA), which was a burdensome and unnecessary proposal that would have interfered with the ability to sell property - hundreds of SCCAOR members participated in several committee meetings that led to the Council opposing COPA with a 9-2 vote
- SCCAOR members spoke before the San Jose City Council in support of Mayor Matt Mahan and his effort to secure Emergency Interim Housing (EIH) funds to get homeless on the streets and in our creeks into shelters
- SCCAOR educated the city councils of several cities about the significant costs inherent in electrification mandates
- Hosted a REALTOR(R) Action Fund (RAF) Major Donor appreciation luncheon at the Capital Club to honor those who contributed to RAF at the highest level

# MEMBERSHIP SERVICES

## PROFESSIONAL STANDARDS



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

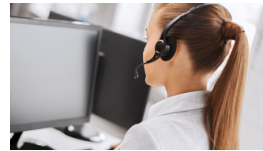
In 2023, the Grievance Committee reviewed 13 ethics complaints. One complaint was converted to a citation. One complaint was dismissed by the Grievance Committee.

There were 11 Professional Standards Disciplinary Hearings and three Arbitration hearings. There were two Director Reviews of the disciplinary hearing panel's decision.

One Mediation request was filed and withdrawn.

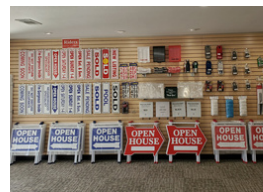
Christine Borg, Professional Standards Coordinator, represented SCCAOR as a panel member for a C.A.R. discussion of best practices to all Professional Standards Coordinators statewide.

## 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!

## EDUCATION



**53**

IN-PERSON &  
VIRTUAL CLASSES



**2074**

TOTAL  
ATTENDANCE

# 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.

### 2023 BY THE NUMBERS



**96,913**

Total grants & donations distributed



**18**

Local organizations supported  
plus 19 local youth received scholarships!



**\$70,000**

in Down Payment Assistance Grants

## ORGANIZATIONS SUPPORTED

- Alzheimers Association
- Assistance League of San Jose
- Chicago Title for Make-A-Wish
- City Team San Jose
- Community SEVA
- Community Solutions
- Community United San Jose
- East Side Union High School Education Foundation
- Good Karma Bikes
- KAPFA
- Katherine R. Smith Elementary
- Martha's Kitchen
- Rebekah Children's Services
- Rebuilding Together, Silicon Valley
- Soul Centric Counseling
- South County Compassion Center
- St. Catherine's Reach Out\*
- St. Joseph's Family Center

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 \$14,950 in scholarships to 19 students.



# COMMUNICATIONS



## SCCAOR STUDIO



**224**  
MEMBER  
HEADSHOTS  
COMPLETED



**36**  
MEMBER  
VIDEO RESUMES  
COMPLETED

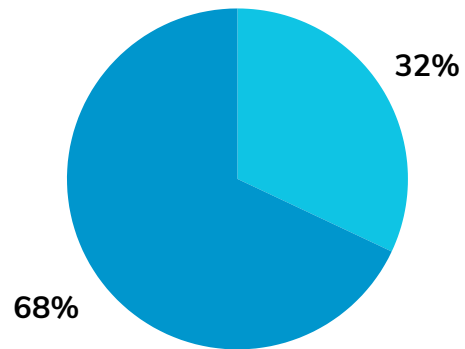
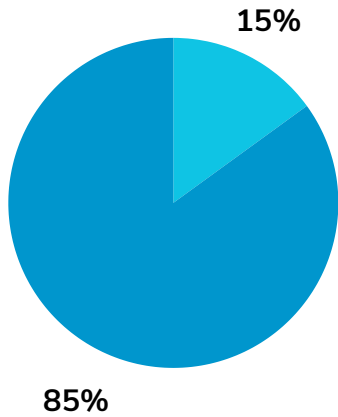
## SOCIAL MEDIA STATS

	Followers at end of 2022	Followers at end of 2023	% change
Facebook	4815	4887	+1.4%
Twitter	5453	5408	-.82%
Instagram	1756	2059	+17.2%
LinkedIn	455	558	+22.6%
YouTube	423	529	+25%



## INCOME STATEMENT (JANUARY 1- DECEMBER 31, 2023)

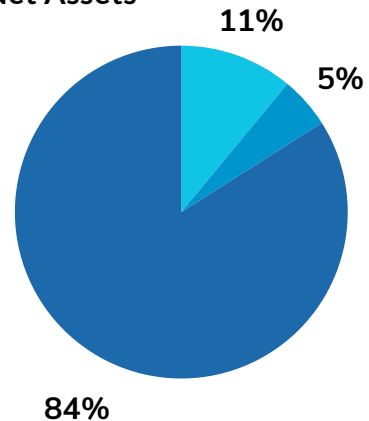
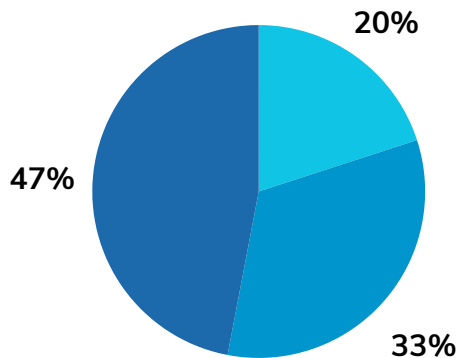
Revenue		Expenses	
■ Dues and Fees	\$ 2,679,702	■ Program Expenses	\$ 2,036,097
■ Activities & Other	\$ 461,335	■ Management & General	\$ 924,988
<b>Total Revenues*</b>	<b>\$3,141,037</b>	<b>Total Expenses</b>	<b>\$2,961,085</b>



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

## STATEMENT OF FINANCIAL POSITION (DECEMBER 31, 2023)

Assets		Liabilities	
■ Current Assets	\$2,556,066	■ Current Liabilities	\$1,371,696
■ Long Term Assets	\$4,318,737	■ Long Term Liabilities	\$670,865
■ Property & Equipment	\$6,100,229	■ Net Assets	\$10,932,471
<b>Total Assets</b>	<b>\$12,975,032</b>	<b>Total Liabilities</b>	<b>\$12,975,032</b>
		<b>&amp; Net Assets</b>	



# 2023 AWARD RECIPIENTS



**Angie Cocke**

REALTOR® OF THE YEAR



**Darell Monda**

AFFILIATE OF THE YEAR



**Doug Goss**

VOLUNTEER OF THE YEAR



**Barbara Lymberis**

PRESIDENT'S CHOICE  
AWARD



**Stephanie Ligsay**

GOVERNMENT  
AFFAIRS CHAMPION  
OF THE YEAR



**Anne Hansen**

PRESIDENT'S CHOICE  
AWARD

# 2023 CORPORATE SPONSORS



**STEPHEN BASS**

— HOME REPAIR & REMODELING INC —



**INSTA**  
MORTGAGE

**tour**factory

**MLS** LISTINGS

**VENTURA  
HERSEY &  
MULLER** LLP

ATTORNEYS AT LAW

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Thank you 2023 Corporate Sponsors!



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