

JOINT CONSOLIDATION PROCESS TIMELINE

- **DEC 2006**
 - CSMAR and VCCAR form a partnership – Ventura County Regional Data Share (VCRDS)
- **SEP 2009**
 - VCRDS joins California Real Estate Technology Services (CARETS)
- **2014**
 - President Collaboration to Explore Consolidation
- **DEC 2016**
 - CSMAR and VCCAR Commit Funds for Exploration
- **JUL 2017**
 - Presidents Interview Facilitators
- **OCT 2017**
 - Announcement made at BOOM'er Meetings
- **NOV 2017**
 - NAR REALTORS® Conference & Expo Travelers Meet with Ron Phipps (Facilitator)
- **DEC 2017 & JAN 2018**
 - Announcement is made at the Annual Installation events
- **FEB 2018**
 - Immediate Past Presidents assemble the Consolidation - [Workgroup 1](#)
- **MAR 9, 2018**
 - Kick-off Meeting with Ron Phipps at CSMAR – [Workgroup 1](#)
- **MAY 31, 2018**
 - CSMAR BOOM'er meeting – Sunset Hills Country Club
- **JUN 2018**
 - Workgroup Assignments
 - Consultation with Attorneys/CPA's
 - Consultation with Ron Phipps
 - July 11, 2018 CEO's meet for Strategic Plan Analysis
 - June 29, 2018 Task Force assignments meet at CSMAR
- **JUL 2018**
 - Officer Briefing
 - July 9, 2018 CEO's meet at CSMAR [discuss staffing](#)
 - July 9, 2018 [Programs/Products/Services](#) Task Force meet
 - July 17, 2018 CEO's meet at VCCAR – [discuss building](#)
- **AUG 2018**
 - Conference call w/Ron Phipps
 - Conference call w/Financial Advisor
 - CSMAR Briefing
 - VCCAR Briefing

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- **AUG 8, 2018**
 - Consolidation Meeting at VCCAR
- **SEP 2018**
 - Sept 20, 2018 Joint BOD meetings at Pharos Center with Ron Phipps
 - Sept 24, 2018 CSMAR BOOM'er meeting – CSMAR office
- **DEC 14, 2018**
 - Governance Taskforce meets at CSMAR – **Workgroup 1**
- **JAN 14, 2019**
 - Conference Call with Tax consultants
- **FEB 2019**
 - Feb 5, 2019 Conference Call with CPA Armanino at VCCAR
 - Feb 8, 2019 CSMAR BOOM'er Meeting – Stonehaus Restaurant
- **MAR 2019**
 - March 6, 2019 **Workgroup 2** (includes Officers) meet at CSMAR
 - March 8, 2019 **Board Structure Taskforce** meet at VCCAR
 - March 14, 2019
 - CEO's meet at CSMAR – **Budgets** (VCCAR staff included)
 - **Committee Task force** meet at CSMAR
 - March 18, 2019 **Workgroup 2** meet at VCCAR
 - March 20, 2019 **Workgroup 2** meet at CSMAR
- **APR 2019**
 - April 3, 2019 **Workgroup 2** meet at VCCAR
 - April 11, 2019 **Workgroup 2** meet at VCCAR
 - April 12, 2019 **New Name Task Force** meet at CSMAR
 - April 15, 2019 **Workgroup 2** meet at CSMAR
 - April 29, 2019 **Workgroup 2** meet at VCCAR
 - April 30, 2019 Consolidation website is live (www.csmarandvccar.com)
- **MAY 2019**
 - May 1, 2019 Message is sent to members regarding information on joint website and upcoming vote.
 - May 9, 2019 Joint Board of Directors mixer – Slate Restaurant
 - May 20, 2019 VCCAR BOOM'er Meeting – VCCAR
 - May 22, 2019 VCCAR General Membership Meeting - Oxnard Performing Arts Center
 - May 23, 2019 CSMAR BOOM'er Meeting – Stonehaus Restaurant
 - May 30, 2019 Conference call with President's, CEO's, Attorney
 - May 30, 2019 General Membership Meeting - CSMAR
 - May 31, 2019 Joint Past President's Luncheon – Moorpark Country Club

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Workgroup 1

Feb 2018 – Feb 2019

Wyndi Austin
Nelson Carrillo
Becky Duarte
Lyle Elliott
Dennis Goldstein
Debbie Hake
Linda Mills
Evelyn Schultz

Products/Programs & Services

Task Force 2018

Nelson Carrillo
Becky Duarte
Dennis Goldstein
Linda Mills

Buildings Review Task Force 2018

Wyndi Austin
Molly Pellegrino
Evelyn Schultz

Finance Task Force 2018

Wyndi Austin
Molly Pellegrino
Evelyn Schultz

NAR REALTORS® Conference & Expo Travelers – 2017 (Meeting with Ron Phipps)

Wyndi Austin
Matt Capritto
Jorge DeLeon
Lyle Elliott
Debbie Hake
Evelyn Schultz
Gayle Sutton

Workgroup 2

March 2019 - Present

Wyndi Austin
Matt Capritto
Tim Comstock
Jorge DeLeon
Lyle Elliott
Juliet Esquibias
Nick Gough
Debbie Hake
Mike Hanley
Sher Heard
Liz Parvex
Evelyn Schultz
Gayle Sutton

Board Structure

Task Force

Wyndi Austin
Matt Capritto
Jorge DeLeon
Juliet Esquibias
Nick Gough
Liz Parvex
Evelyn Schultz
Gayle Sutton

New Name Task Force

Wyndi Austin
Tim Comstock
Brooke Grayson
Liz Parvex
Evelyn Schultz
Tammy VanDeusen

Committee Task Force

Wyndi Austin
Tim Comstock
Debbie Hake
Sher Heard
Mike Hanley
Evelyn Schultz

Finance Task Force 2019

Wyndi Austin
Molly Pellegrino
Evelyn Schultz

Governing Documents Task Force

Wyndi Austin
Matt Capritto
Tim Comstock
Jorge DeLeon
Lyle Elliott
Juliet Esquibias
Nick Gough
Debbie Hake
Mike Hanley
Sher Heard
Liz Parvex
Evelyn Schultz
Gayle Sutton

