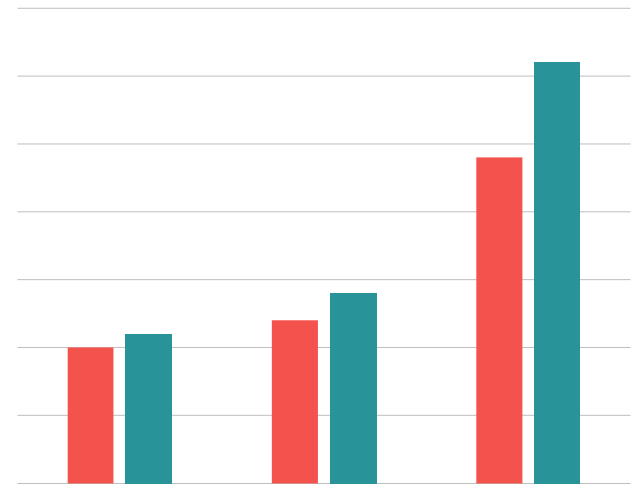


2018 PAC Match Survey



Survey Overview and Methodology

The Public Affairs Council conducts this survey annually to identify common trends and practices of PACs administering charitable match programs. Survey questionnaires were completed only by PAC professionals who operate a PAC match program. Surveys were distributed at the National PAC Conference in March 2018, as well as via social media channels to the Council's PAC community. In all, 24 organizations participated in the survey. This report provides a summary of answers to survey questions.

The Case for PAC Match

PAC charitable match allows a PAC's connected organization to match all or a portion of an individual's PAC contribution to a charitable entity. Organizations have the discretion to make a 1:1 match for all contributions, match only certain contributions or require a giving threshold before the match kicks in. As this survey's results show, different PACs choose different structures that meet their internal culture, resources and needs. Regardless of the structure, neither the organization nor the individual receive a tax deduction for the charitable contribution.

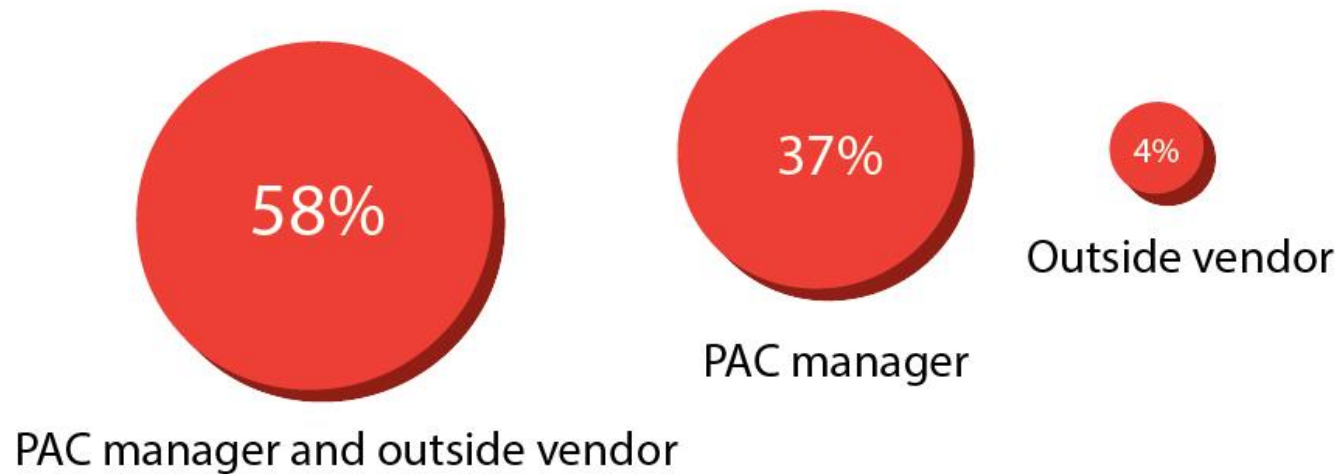
The Public Affairs Council's *2017 Corporate PAC Benchmarking Report* found that PAC match was the single most effective PAC benefit offered by PACs to incentivize PAC contributions. This report examines the administration, restrictions and disbursement procedures of PAC match programs. The report also shares the limitations and requirements for donors and charities to be eligible for this program.

The Public Affairs Council has many resources and information on PAC match. For questions or additional resources, contact the Council at 202.787.5969.

Survey Responses

Part I. Administration

Who administers your PAC match program?



Of the responses for outside vendors, the following firms were identified:

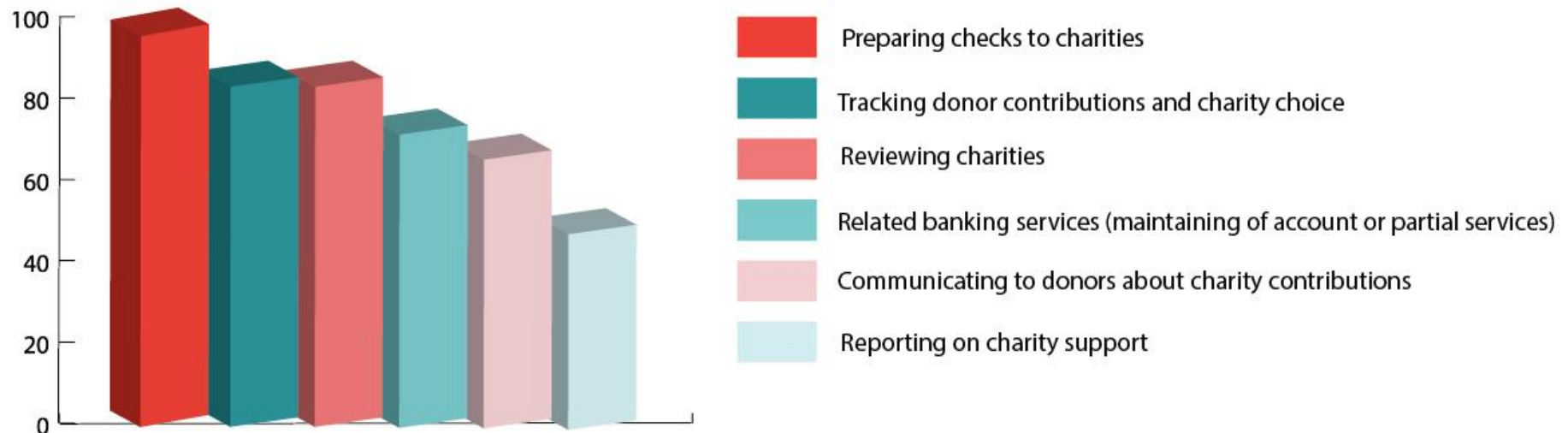
- Public Affairs Support Services (11 respondents)
- Benevity (1 respondent)
- Comerica (1 respondent)
- YourCause (1 respondent)

n = 24

Survey Responses

Part I. Administration

If applicable, what services does your vendor provide?



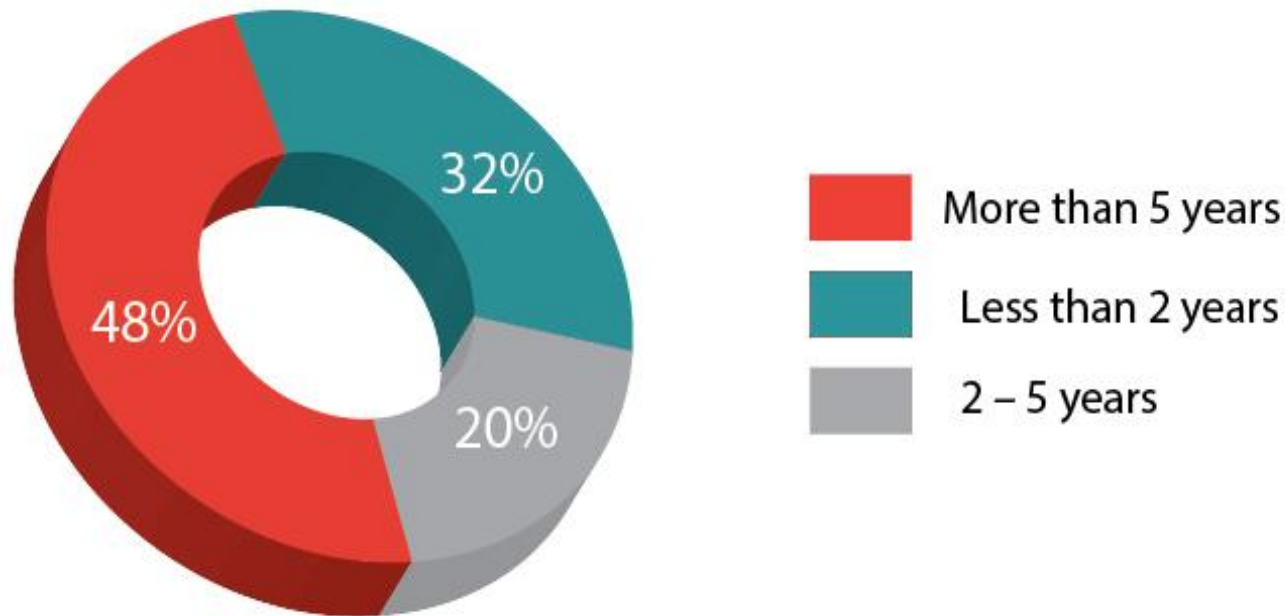
Other responses:

- Hosts a web-portal for PAC related information

Survey Responses

Part I. Administration

How long has your PAC match program been in place?



Survey Responses

Part II. Eligibility

All but one of the survey's responding PACs offer PAC match to all eligibles.

- One responding PAC reported offering the PAC match to only those that contribute by credit/debit card.
- In some cases, even if eligible, they may be required to reach a giving threshold to receive the match.

83% of PAC match programs place restrictions on the amount required or level obtained to be eligible for charitable match.

- Of these restrictions, **84%** are based on annual contribution amounts, while **16%** are based on amount given per pay period.

17% match every contribution to the PAC, regardless of the amount or manner in which it was contributed.

n = 23

Survey Responses

Part II. Eligibility

Of the **83%** of PAC match programs that place restrictions on which contributions are eligible for the charitable match, **84%** required a minimum annual contribution. These contribution minimum responses included:

Annual Contribution Amount:

- \$1,000
- \$520
- \$500 – 3 responses
- \$300
- \$260
- \$250 – 2 responses
- \$100
- \$50
- \$25
- .25% of annual base salary

Survey Responses

Part II. Eligibility

Of the **83%** of PAC match programs that place restrictions on which contributions are eligible for the charitable match, **16%** required a minimum contribution per pay period. These contribution minimum responses included:

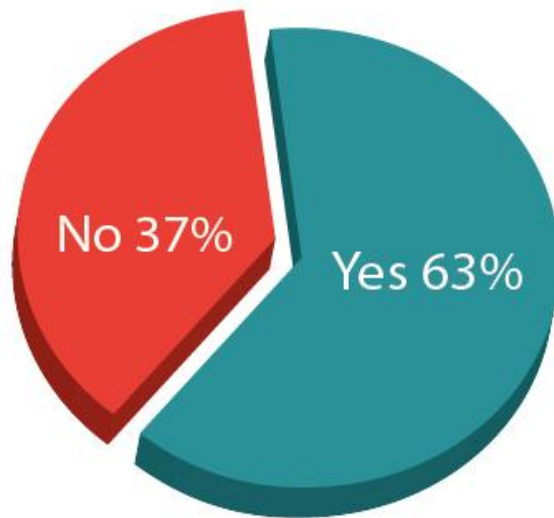
Pay-Period Contribution Amount:

- \$38.46
- \$25 monthly or \$12.50 bi-monthly
- \$20 – 2 responses
- \$19.25
- \$10 – 2 responses
- \$8.33
- Half percent of salary

Survey Responses

Part III. Amount of Match

Is every contribution eligible for PAC match matched on a 1:1 basis?



n = 24

Of those that aren't eligible on a 1:1 basis, the following match amounts were shared:

- Tiered match based on contribution level
- .50:1 for all donors – 2 responses
- 1:1 for leadership club donors and .50:1 for all other donors
- 1:1 for \$5,000 donors, 1:1 for first-time donors, tiered for all others
- 2:1 for Gold level donors, 1.50:1 for Silver level, 1:1 for Bronze level
- Minimum donation of \$300/year to receive \$100 charitable contribution
- Donations of \$20/pay period receive a \$250 match, \$30/pay period receive a \$500 match, \$55/pay period receive a \$1,000 match and can select up to two charities to split the donation.
- Donations of \$1,000-\$2,499 receive a \$500 match, \$2,500-\$3,499 receive a \$1,500 match, \$3,500-\$4,999 receive a \$2,500 match, \$5,000 receive a \$5,000 match

Survey Responses

Part III. Amount of Match

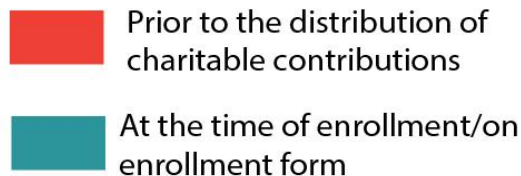
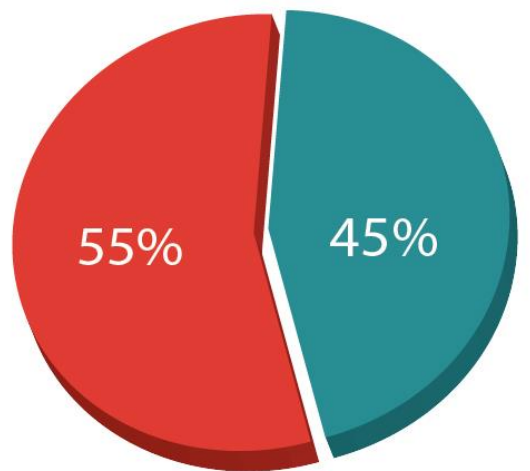
46% of total respondents indicated there is a maximum amount below the legal contribution amount they will match annually. The following responses were shared:

- \$2,500 – 2 responses
- \$2,000
- \$1,000 – 5 responses
- \$250
- \$100
- \$500,000 annual cap for overall PAC Match budget

Survey Responses

Part IV. Charity Eligibility and Selection

When are contributors asked to name their charity?



n = 22

29% of respondents pre-select or **limit** the number of charities donors may choose from. 71% do not limit the charity options.

75% of respondents allow donors to specify **United Way** as a recipient of PAC match funds.

50% of respondents also allow donors to select **multiple charities** to receive matching funds in one calendar year.

Survey Responses

Part IV. Charity Eligibility and Selection

Of the **29%** of respondents that pre-select or **limit** the number of charities donors may choose from, they provide the following options:

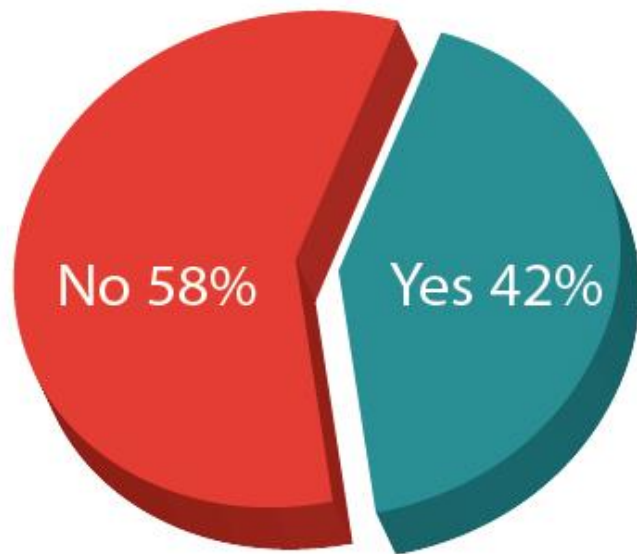
- This year we offered state-specific charities—one for every state we operate in, in addition to 7 that are nationally based.
- We offer 3 pre-selected charities.
- We provide a list of 14 charities plus a “non-profit school of choice” option.
- We match to just one charity.
- We offer 7 pre-selected charities, one in each state we operate in.

Survey Responses

Part IV. Charity Eligibility and Selection

Does your PAC have restrictions on the types of charities eligible to receive PAC match funds?

(Other than it must be a 501(c)3.)



n = 24

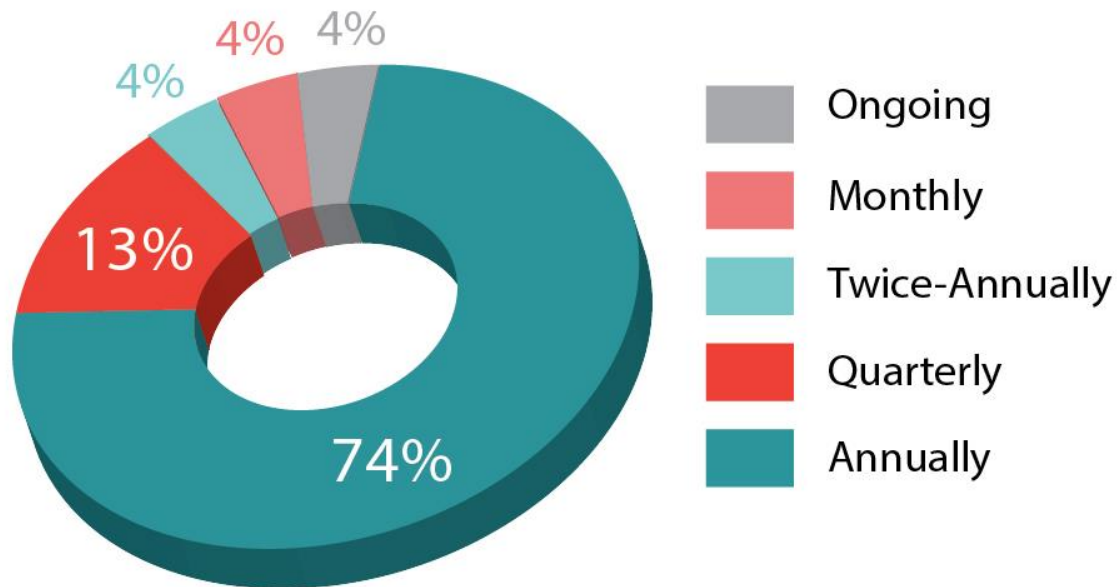
Of those respondents that indicated they place additional restrictions on eligible charities (other than it must be a 501(c)3) these responses were shared:

- No political organizations
- No fraternal organizations
- No private schools
- No religious institutions – (5 responses)
- No animal shelters or Planned Parenthood given the personal nature of these causes
- Our criteria focuses on excluding discriminatory organizations
- We do not support organizations not deemed in alignment with our corporate culture and values – (3 responses)

Survey Responses

Part V. Disbursement of Funds

When are PAC match contributions distributed to charities?



n = 23

Other frequencies:

- Approximately every 6 weeks
- Annually for payroll deductions, quarterly for one-time donations by personal check
- Annually for payroll deductions, quarterly for contributions made by personal check or credit cards
- Annually for payroll deductions and quarterly for one-time donations

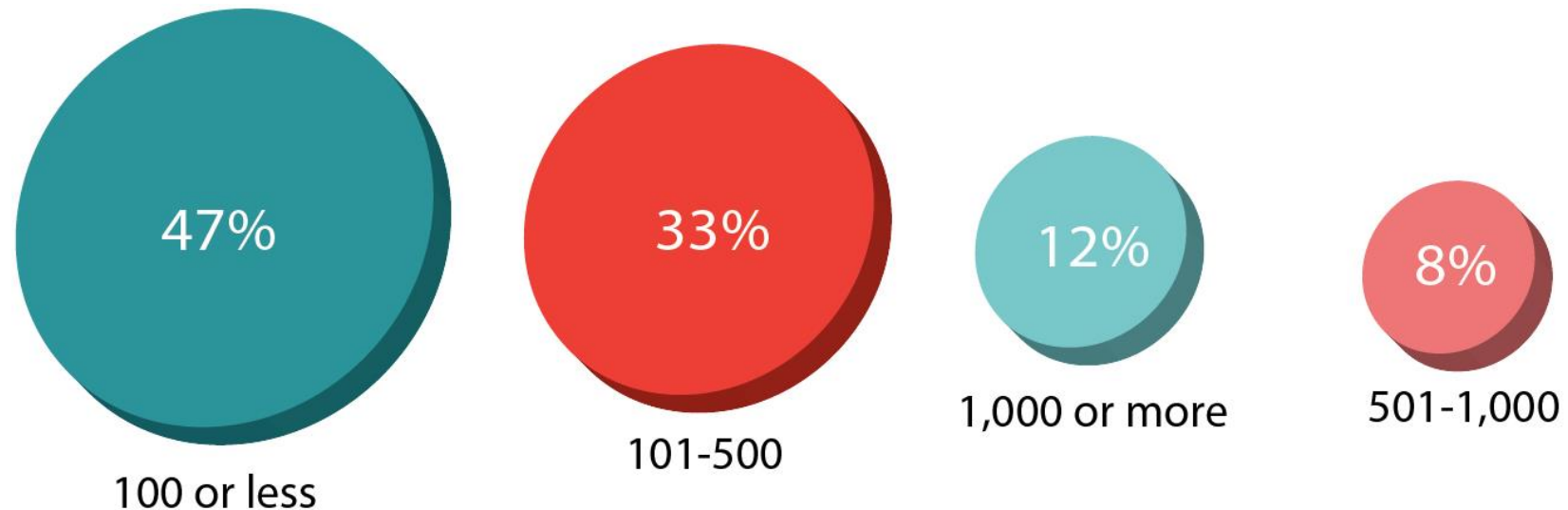
Survey Responses

Part V. Disbursement of Funds

82% of PACs **notify charities** of the name or name and address of each PAC member that designated that charity to receive the matching funds. Of this number, **43%** notify the charity of the name of the donor only.

n = 23

Approximately how many charities received contributions through your PAC match program in 2017?



n = 24

Survey Responses

Part V. Effectiveness

Do you think PAC Match is an effective tool for raising money for the PAC?

Yes:

- Absolutely—it's our #1 incentive.
- Yes, particularly in this current political climate. We have heard directly from our PAC members and peer recruiters.
- Yes. Matching gift required amounts provide good suggested giving amounts and encourage increased giving.
- It is the #1 reason people join the PAC.
- Yes, it encourages folks to think bigger about their contribution, and provides another added benefit for giving, especially for younger donors and first time donors.
- Yes, in recent surveys PAC match is the most likely reason listed for PAC membership.
- Yes, win-win
- Yes, we based a peer to peer campaign around the launch of our PAC match program and had a lot of success.
- Absolutely, 54% of my PAC members give \$500+ and this is the best way to sell people on the PAC.
- Yes, our suggested minimum contribution also helps encourage people to give a bit more than they typically would.
- Yes, we saw a 100% increase in the first year of our PAC Match program.
- Our participation has increased in number of donors and receipts since we launched our PAC Match program.
- Absolutely. Employees love the program, but it can be difficult to explain to prospective donors in short form (email).

Survey Responses

Part V. Effectiveness

Do you think PAC Match is an effective tool for raising money for the PAC?

Unsure/Other:

- We have had PAC Match for so long it is difficult to measure the monetary value.
- I don't think it really drives fundraising. It is a nice thing to see when you contribute, but we don't advertise it. If we had a bigger PAC Match program it might be more impactful.
- I am not 100% convinced—we haven't seen growth, but I do think it provides a general sense of relieving the “pain” of the PAC contribution.

If your PAC Match program is less than 5 years old, please explain the impact that adding this benefit has had on your PAC fundraising efforts.

- Our Leadership Club membership is at its highest level (35%) and PAC Match is a big reason for that. Members bumped up to get the full 1:1 match.
- PAC Match began in 2013 and the PAC raised \$600K a year. By 2015 the PAC raised \$1 million+ a year.
- Our PAC grew by 100% the first year of PAC Match.
- Our program launched in 2016 with 77% of employees enrolling in the program. In 2017, that percentage increased to 90% participation.
- Since launching our program within the past year, we've gained approx. 200 new members and our receipts grew by over \$180,000.

The Significance of PAC Match

As illustrated in this survey, PAC charitable match can be an effective tool for increasing overall contributions and participation in the PAC. In fact, PAC match has been reported as the most effective benefit for incentivizing PAC support in the Council's 2017, 2015 and 2013 *Corporate PAC Benchmarking Reports*. It is important to note that PAC match is not always capable of vastly improving a PAC that conducts ineffective solicitations. PAC match is most successful when it complements an already successful program. When done in this manner and structured effectively, PAC match has the potential to increase participation significantly.

The Public Affairs Council has many resources and information on PAC match. For questions or additional resources, contact the Council at 202.787.5969.

Thank you to all of the PAC administrators
who participated in this survey!

Have questions?

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