

2023 Association Benchmarking Report Survey Draft

Welcome! (Page 1)

Thank you for participating in the Public Affairs Council's *2023 PAC Benchmarking Survey*. For many years, The Council has conducted this rigorous study following each election cycle. The survey and resulting report cover the structure, staffing and management, leadership engagement, fundraising activities and disbursement strategy of corporate and association PACs.

This version of the survey is for trade and membership associations only.

If you do not represent a trade or membership association, **please exit this survey** and contact Tori Ellington at vellington@pac.org for instructions on how to access the corporate version of this survey.

(Page 2)

If you complete this survey in full, you will receive the following as a thank you for your time and participation:

- A **complimentary copy** of the final PAC Benchmarking Report
- Exclusive access to a **webinar** discussing the findings and their implications for the profession
- An entry into a **drawing to receive complimentary registration** to your choice of the 2024 or 2025 National PAC Conference for those who complete the survey by 5 p.m. EST on **April 28th**.

Before you begin, a few notes on filling out the survey:

- Your responses are **confidential**. Individual associations will not be revealed as all data will be reported in the aggregate
- If you do not have exact numbers, **estimates** may be used throughout the survey
- Your responses should relate to your organization's **federal PAC** activities only
- Should you want to adjust or review your answers, **use the "Prev" button**, not your browser's back button
- This survey should take **approximately 20 minutes** to complete

This survey will close on **Friday, April 28**. Should you have any questions, please contact Tori Ellington, manager, PAC & grassroots practices at vellington@pac.org.

Thank you for taking part in this important research effort.

(New Page)

1. To ensure you receive your free copy of the study, please provide the following contact information. Please complete all items requested.

Note: All responses are confidential. All data will be reported in the aggregate and will not be associated with any individual organization. Your contact information will only be used to deliver your free report, and will not be used for any other purpose.

- Name:
- Organization:
- Job title:
- Email address:
- Phone number:

Association Profile

2. Please indicate your association type:
 - Trade association with corporate members only
 - Trade association with both corporate and individual membership categories
 - Individual membership association or professional society
 - Other type of association (please specify)
3. Please indicate which of the following structures describes your association:
 - State chapters in all 50 states
 - State chapters in states with high membership concentration
 - Separate state associations affiliated with one national association
 - Non-federated structure (no state chapters or associations)
4. What are your association's annual revenues for the most recent fiscal year? (If you are not sure of the exact number, please make your best estimate.)
 - <\$1 million
 - \$1 million – \$3 million
 - \$3.1 million – \$5 million
 - \$5.1 million – \$10 million
 - \$10.1 million – \$20 million
 - \$20.1 million – \$50 million
 - \$50.1 million – \$100 million
 - >\$100 million
5. What is the approximate number of U.S. employees in your association?
(If you are not sure of the exact number, please make your best estimate.)
 - < 30
 - 30 – 50
 - 51 – 100
 - 101 – 150
 - 151 – 200
 - 201 – 300
 - 301 – 500
 - >500

PAC Management and Structure

6. What is the name of your association's federal PAC?

(The Public Affairs Council asks for this information to collect current FEC data on your PAC to track historical trends among all responding PACs. Your PAC's name will not be associated with the data displayed in this report in any way.)

- Federal PAC Name: _____

7. How many professional and administrative staff in your association spend at least 50 percent of their time on federal PAC-related responsibilities?

For the purposes of this question:

- Professional staff are those WITH decision-making capacities and/or supervisory responsibilities
- Administrative staff are those WITHOUT direct decision-making authority

Please count part-time staff as 0.5 staff (e.g., 1 FT and 1 PT staff = 1.5 total staff).

- Number of professional staff = _____
- Number of administrative staff = _____

8. Please indicate which of the following activities are primarily conducted by your association's federal PAC staff or volunteers, and which are primarily conducted by external consultants or other vendors:

(Check all that apply for each column.)

	PAC staff or volunteers	External consultants or vendors
Maintaining contributor database		
Solicitation planning or development		
Conducting solicitation meetings		
Selecting candidates or disbursement strategy		
Check writing		
FEC reporting		
Writing or editing communications materials (newsletters, annual reports, etc.)		
Administering donor benefits or incentives		
PAC ambassador recruitment and/or training		

Other activities:

(Please specify activity and if it is conducted by staff or consultants/ vendors)

9. Please indicate the approximate annual operating budget of your federal PAC:
- This may include such items as the use of vendors, administrative/operating expenses, incentives for PAC donors, fundraising events, website services, etc.
 - EXCLUDE salaries and PAC receipts
 - < \$10,000
 - \$10,001– \$20,000
 - \$20,001 – \$30,000
 - \$30,001 – \$40,000
 - \$40,001 – \$60,000

- \$60,001 – \$80,000
- \$80,001 – \$100,000
- \$100,001 – \$150,000
- \$150,001 – \$200,000
- \$200,001 – \$300,000
- \$300,001 – \$400,000
- \$400,001 – \$500,000
- \$500,001 – \$600,000
- \$600,001 – \$700,000
- > \$700,000

10. Please indicate how your annual operating budget is allocated (as a percentage of the total amount) across the following categories:

- Please enter whole numbers only (no decimal points or % signs)
 - If you do not have the exact number, please estimate as best as possible
 - The total must sum to 100%
- A. Outsourcing (*professional services/consultants*) _____
- B. Administration/PAC management/database management (*including operating expenses such as travel, communications, printing, postage, etc.*) _____
- C. Fundraising/event management _____
- D. Gifts and member benefits _____
- E. PAC website services _____
- F. All others (describe below) _____

11. If applicable, please describe what is included in the “all others” category above: _____

PAC Oversight and Leadership Involvement

12. Please indicate how your association's staff executive (the CEO, for instance) and its member leader (such as the board chair or president) are involved in your association's federal PAC:

(Check all that apply for each column.)

	Staff executive	Member leader
N/A – no involvement		
Makes presentation at or opens solicitation meetings		
Signs or sends solicitation letters and emails		
Appears in a PAC video		
Signs or sends thank you letters		
Contributes the maximum amount allowed to the PAC		
Contributes below the maximum amount allowed to the PAC		
Formally endorses the PAC		
Serves on the PAC board		
Chairs the PAC board		
Sends communications on behalf of the PAC (e.g., PAC newsletter)		
Attends PAC events		
Hosts PAC donor appreciation events		
Solicits association's board of directors		

Solicits prior approval (trade associations only)		
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Please describe any other involvement areas:

(Please indicate area and whether it is for the staff executive or the member leader.)

13. Please indicate which categories of individuals serve as federal PAC board members:

(Check all that apply.)

- Member company CEOs
- Members of the association's board of directors
- Member company representatives
- State chapter representatives
- General association members
- Government affairs staff
- Finance staff
- Legal staff
- Office of the CEO staff
- Governance staff (i.e., board relations)
- Other (please specify) _____

14. Does your association's federal PAC have a PAC board of directors?

(This may also be called the PAC steering or executive committee.)

- Yes
- No

15. How many people are on the federal PAC's board of directors?

- Number of people on the PAC board = _____

16. Does the PAC have term limits for its board of director positions?

- Yes
- No

17. If you answered yes to the previous question, what are the term lengths?

- 2 years
- 4 years
- 6 years
- Other: _____

18. Please indicate the activities conducted by the federal PAC board members:

(Check all that apply.)

- Approve contributions to candidates
- Manage communications activities
- Manage transparency activities
- Plan solicitations
- Manage strategic planning/goal setting
- Conduct in-person fundraising or give PAC presentations
- Select candidates or manage disbursement strategy
- Approve changes to bylaws
- Provide internal budget planning/oversight

- Solicit prior approval (trade associations only)
- Recruit PAC ambassadors/champions
- Host PAC donor appreciation events
- Sign/send solicitation letters
- Provide general PAC oversight/input
- Attend PAC events
- Attend candidate fundraisers
- Other (please specify)_____

19. Please indicate which of the following federal PAC-related activities your association conducts to manage compliance:

(Check all that apply.)

- Employs external legal counsel
- Conducts compliance audit at least once per cycle (using in-house or contracted counsel)
- Conducts compliance audit at least once per cycle (using external firm other than legal counsel)
- Conducts intermittent compliance audit(s)
- Monthly reconciliation of bank statements
- Other (please specify) _____

PAC Receipts and Fundraising

This section of the survey requests information on solicitations and contributions received. Please limit your answers to the 2021 – 2022 election cycle.

If you do not have exact numbers for any of the following, please estimate as best as possible.

20. What was the total dollar amount of all PAC contributions from ALL of your donors for the 2021-2022 election cycle?

- Total 21/22 cycle contributions (in dollars) =

21. What was the average or "typical" individual contribution dollar amount to your PAC for the 2021-2022 election cycle?

- < \$250
- \$250 – \$500
- \$501 – \$1000
- \$1,001 – \$1,500
- \$1,501 – \$2,000
- \$2,501 – \$3,000
- \$3,001 – \$3,500
- \$3,501 – \$4,000
- \$4,001 – \$4,500
- \$4,501 – \$5,000

22.

23. How many members and association employees were ELIGIBLE for your federal PAC for the 2021-2022 election cycle?

- Include employees of member companies that have given prior approval, where applicable
 - Include ALL eligible individuals, regardless of whether they were solicited
 - Total number of ELIGIBLE individuals for 21/22 cycle = _____
24. Of the eligible individuals listed above, how many were SOLICITED for a contribution in the 2021-2022 election cycle?
- Provide the number who were solicited, even if they did not make a contribution. A solicitation includes any requests for contributions, sharing benefits of membership or encouraging support of the PAC.
 - Total number of eligible class individuals SOLICITED in 21/22 cycle = _____
25. Of the solicited individuals listed above, how many CONTRIBUTED to your federal PAC in the 2021- 2022 election cycle?
- Total number of eligible class individuals CONTRIBUTED in 21/22 cycle = _____
26. Please indicate the percentage of total PAC contributions for the 2021-2022 election cycle that are attributable to the following four groups:
- Please enter whole numbers only (no decimal points or % signs)
 - If you do not have the exact number, please estimate as best as possible
 - The total must sum to 100%
 - A. Percentage from **association senior management**: *(Executive-level personnel with substantial oversight/reporting responsibilities)* _____
 - B. Percentage from **association staff**: *(Non-senior management)* _____
 - C. Percentage from **association board of directors members**: _____
 - D. Percentage from **all other association members**: _____
27. Did you gain PAC members in 2021 – 2022 and if so, approximately how many?
Please only respond if you gained PAC members.
- Number of new PAC members: _____
28. Did you lose PAC members in 2021 – 2022 and if so, approximately how many?
Please only respond if you lost PAC members (to retirements, lack of interest/ support, financial concerns, etc.)
- Number of lost PAC members: _____
29. Does your association have corporate members?
- Yes
 - No
30. What percentage of corporate member companies give your PAC prior approval to solicit some or all of their PAC-eligible employees?
- None
 - 1% – 10%
 - 11% – 25%
 - 26% – 50%
 - 51% – 75%

- 76% – 90%
- 91% – 100%

31. Please indicate the percentage of total contributions made to your association's federal PAC for the 2021-2022 cycle via the following methods:

- Please enter whole numbers only (no decimal points or % signs)
- If you do not have the exact number, please estimate as best as possible
- The total must sum to 100%

A. Payroll deduction: _____

B. Credit card (*one-time or recurring*): _____

C. Check: _____

D. Cash: _____

E. All other methods (*electronic/mobile payment platforms, etc.*): _____

Strategies for Motivating PAC Participation

32. Which of the following people conduct solicitations for your association's federal PAC?

(*Check all that apply.*)

- CEO/staff executive
- Association senior management (not the CEO)
- Association member leader (e.g., board chair)
- Consultants
- Head of government relations department
- Government relations staff
- PAC board members
- PAC manager
- Association board of directors
- Member company executives (for trade associations only)
- Peer solicitors (not on the PAC board)
- Other (please specify)

33. Which three categories of solicitors have been the most effective?

(*Check up to THREE options.*)

- CEO/staff executive
- Association senior management (not the CEO)
- Association member leader (e.g., board chair)
- Consultants
- Head of government relations department
- Government relations staff
- PAC board members
- PAC manager
- Association board of directors
- Member company executives (for trade associations only)
- Peer solicitors (not on the PAC board)

- Other as specified above

34. Which of the following solicitation approaches are used for your association's federal PAC?

(Check all that apply)

- Online solicitations (e.g., email)
- Peer-to-peer solicitations
- Association's annual meeting or trade show
- Events (e.g., fly-in)
- Fundraising events (e.g., dinner, reception, auction)
- Association staff fundraising event
- Virtual events
- New hire communication or orientation
- Large group meetings
- Small group meetings
- Regular staff meetings
- Association dues invoice
- Interoffice mail
- Phone calls
- Direct mail
- PAC video
- Mobile solicitations via text or app
- Other (please specify)

35. Which three solicitation approaches have been the most effective?

(Check up to THREE options.)

- Online solicitations (e.g., email)
- Peer-to-peer solicitations
- Association's annual meeting or trade show
- Events (e.g., fly-in)
- Fundraising events (e.g., dinner, reception, auction)
- Association staff fundraising event
- Virtual events
- New hire communication or orientation
- Large group meetings
- Small group meetings
- Regular staff meetings
- Association dues invoice
- Interoffice mail
- Phone calls
- Direct mail
- PAC video
- Mobile solicitations via text or app
- Other as specified above

36. Do you have a PAC charitable match program?

- Yes
- No

37. How frequently did your association's federal PAC solicit its eligible class during the 2021 - 2022 election cycle?

- Short campaign once per cycle
- Short campaign once per year
- Semi-annually
- Quarterly
- Periodically, but on a schedule other than listed above
- Continuously or on no set schedule
- Other (please specify)

38. Does your association's federal PAC have incentive clubs?

- Yes
- No

39. How many incentive club levels are in your association's federal PAC?

- One
- Two
- Three
- Four
- Five or more

40. What are the minimum contributions required for membership at the following levels?

- Minimum annual contribution required for lowest incentive club = _____
- Minimum annual contribution required for highest incentive club = _____

41. Please indicate the benefits that are offered ONLY to incentive club members:

- Do not indicate benefits that are also available to general members – you will be able to specify those in the next question.
 - Special communications (e.g., issue updates or newsletters)
 - Special name recognition
 - Annual gift
 - Live events with politician, celebrity or guest speaker
 - Virtual events with politician, celebrity or guest speaker
 - PAC match
 - Event with staff executive and/or board leadership
 - Incentive-club-only events
 - Raffles
 - Upgraded services or special events at association annual meeting/other events
 - Lapel pin
 - Ability to deliver PAC checks to candidates
 - Opportunity to attend candidate fundraiser
 - Exclusive election or policy updates
 - Other (please specify):

42. What benefits are offered to general donors of your association's federal PAC, regardless of contribution amount?

(Check all that apply.)

- Special communications (e.g., issue updates or newsletters)

- Special name recognition
- Annual gift
- Live events with politician, celebrity or guest speaker
- Virtual events with politician, celebrity or guest speaker
- PAC match
- Event with staff executive and/or board leadership
- Incentive-club-only events
- Raffles
- Upgraded services or special events at association annual meeting/other events
- Lapel pin
- Ability to deliver PAC checks to candidates
- Opportunity to attend candidate fundraiser
- Exclusive election or policy updates
- Other (please specify)

43. What ONE benefit is the most effective in your fundraising efforts?

- Special communications (e.g., issue updates or newsletters)
- Special name recognition
- Annual gift
- Live events with politician, celebrity or guest speaker
- Virtual events with politician, celebrity or guest speaker
- PAC match
- Event with staff executive and/or board leadership
- Incentive-club-only events
- Raffles
- Upgraded services or special events at association annual meeting/other events
- Lapel pin
- Ability to deliver PAC checks to candidates
- Opportunity to attend candidate fundraiser
- Exclusive election or policy updates
- Other as specified above

44. Please indicate which of the following communications tools your federal PAC uses to communicate with PAC donors only, and which are used for all PAC eligibles:

(Check all that apply for each column.)

	Used for PAC Donors ONLY	Used for all PAC eligibles
PAC annual report		
PAC newsletter		
Issues updates via email and/or web		
Virtual events, webinars or teleconferences on issues or featuring guest speakers		
Get-out-the-vote education		
PAC-specific social media activities		
Live events (e.g., PAC education, issue overviews and meet-and-greets)		
PAC advertising/ awareness campaign		
Non-political communications (I.e. fun holiday reminders, recipes, work from home tips, etc.)		

Podcasts		
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- Other communications tools used:
(Please specify tool and whether it is directed to only donors or to all eligibles.)

45. Does your association use social media for any PAC purposes?

- Yes
- No

46. Approximately what percentage of your annual or 2022 election cycle fundraising goal did you achieve?

- <20%
- 21 - 30%
- 31 - 40%
- 41 – 50%
- 51 – 60%
- 61 – 70 %
- 71 – 80%
- 81 – 90%
- 91 – 100%
- >100%

PAC Disbursements

47. Which of the following are included in your formal candidate contribution criteria governing PAC disbursements to federal candidates?

(Check all that apply.)

- N/A – my association does not have formal candidate contribution criteria
- Candidate’s political alignment with association membership
- Voting record consistent with your organization’s goals
- Party affiliation
- Financial need
- Leadership position
- Likelihood of being reelected
- Organization has member company facilities or high concentration of membership in the candidate’s district
- Recommendation of a PAC member
- Recommendation of a member company or association chapter
- Industry peers are supporting candidate/event
- Membership on key legislative committees
- Incumbent status
- President, chair, CEO or Board preference for candidate
- Candidate’s position on social issues (e.g., racial equity, environmental sustainability, etc.)
- Character, ethics, reputation
- Support for democratic institutions and/or voting rights
- Alignment with key values
- Other (please specify)

48. Which of the following criteria are the THREE most important factors in making decisions regarding PAC contributions to federal candidates?

(Check up to THREE options.)

- N/A - my association does not have formal candidate contribution criteria
- Candidate's political alignment with association membership
- Voting record consistent with your organization's goals
- Party affiliation
- Financial need
- Leadership position
- Likelihood of being reelected
- Organization has member company facilities or high concentration of membership in the candidate's district
- Recommendation of a PAC member
- Recommendation of a member company or association chapter
- Industry peers are supporting candidate/event
- Membership on key legislative committees
- Incumbent status
- President, chair, CEO or Board preference for candidate
- Candidate's position on social issues (e.g., racial equity, environmental sustainability etc.)
- Character, ethics, reputation
- Support for democratic institutions and/or voting rights
- Alignment with key values
- Other, as listed in previous question

49. Is there a formal process in place for reevaluating and potentially updating your giving criteria?

- Yes
- No

50. If you answered yes to the previous question, how frequently do you reevaluate your PAC giving criteria?

- Quarterly
- Annually
- Each election cycle
- Every 2 years
- Less frequently than every 2 years

51. Please indicate the percentage of your association's total federal PAC dollars contributed to each of the following entities during the 2021 - 2022 election cycle:

- Please enter whole numbers only (no decimal points or % signs)
- If you do not have the exact number, please estimate as best as possible
- The total must sum to 100%

- A. Congressional candidates: _____
- B. Presidential candidates: _____
- C. State and local candidates: _____
- D. Party committees (e.g., NRCC, DCCC): _____

- E. Leadership PACs: _____
- F. Super PACs: _____
- G. Independent expenditures: _____
- H. Other: _____

52. Please indicate the total dollar amount that your association's federal PAC held in reserve (carried over to the next cycle) at the end of the 2021 - 2022 election cycle:

- Dollar amount held in reserve: _____

53. Please indicate the percentage of your association's total federal PAC contributions given to candidates from major parties during the 2021 - 2022 election cycle:

- Please enter whole numbers only (no decimal points or % signs)
- If you do not have the exact number, please estimate as best as possible
- The total must sum to 100%

- A. Democrat: _____
- B. Republican: _____
- C. Independent/Unaffiliated: _____

54. Which ONE of the following individuals/groups is the most influential in directing PAC contributions at the federal level?

- Federal/state lobbyists
- Head of Washington, DC office or head of Public Affairs/Government Relations function
- PAC board – all members
- PAC board chair
- Senior PAC professional
- CEO/staff executive
- Association member leader
- Other (please specify)

55. Please indicate how your association manages contributions at the state level:

(Check all that apply.)

- N/A – my association does not make contributions at the state level
- My association has separate state-level PAC(s) managed by the national association
- My association has separate state-level PAC(s) managed by state chapters
- My association makes contributions at the state level from the same account as the federal PAC, where legal and feasible
- Other (please specify)

56. Does your PAC allow contributors to designate their contribution by party?

- Yes
- No

57. If you answered yes to the previous question, what percentage of contributors choose to designate their contribution by party?

- Percentage of contributors that designate a party: _____

58. How does your federal PAC provide checks to recipients?

(Check all that apply.)

- Check presented in-person at an event hosted by your association
- Check presented in-person at an event hosted by a member company
- Check presented in-person at a large group event hosted by another organization
- Check mailed to campaign office
- Check brought to fundraising event
- Check presented during a small group meeting with the candidate in Washington, D.C.
- Check delivered by PAC donor(s) in district
- ACH or electronic payment transfers
- Other (please specify)

59. What best describes your association's level of involvement with super PACs?

- My association contributed to a super PAC in the 2021-22 cycle
- My association has contributed to a super PAC in the past but not in the 2021-22 cycle
- My association has a policy prohibiting contributions to super PACs
- My association doesn't prohibit contributions to super PACs, but we have never made a contribution
- My association has started its own super PAC (independent expenditure-only committee)
- Other (please specify)

Survey is complete!

Thank you for participating in the 2023 PAC Benchmarking Survey and contributing to the compilation of a comprehensive report on PAC best practices and trends. Your responses have been recorded.

If you have completed this survey in full, you will receive the following as a thank you for your participation:

- A complimentary copy of the final PAC Benchmarking Report
- Exclusive access to an invitation-only webinar to discuss the findings and their implications for the profession
- An entry into a drawing to receive complimentary registration to your choice of the 2024 or 2025 National PAC Conference for those who complete the survey by 5 p.m. EST on April 28th.

In the meantime, if you have any questions regarding this survey, please don't hesitate to contact us.

We appreciate your time and participation!