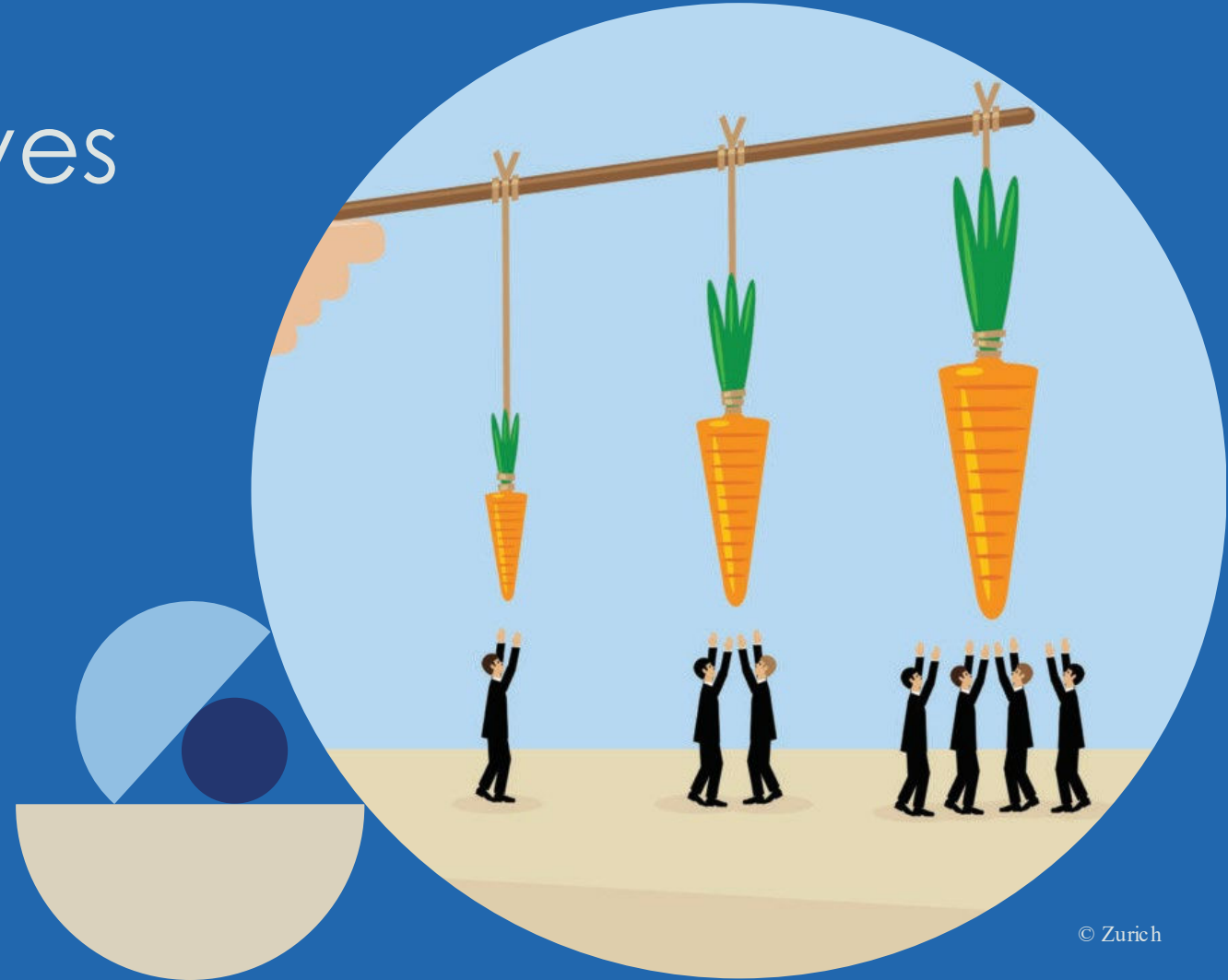


# Impactful PAC Incentives

Desta Wallace  
PAC Director  
Zurich North America

Public Affairs Council  
August 13, 2024



# Annual Incentives



	2020	2021	2022	2023	2024
<b>Incentive</b>	100% PAC Match	100% PAC Match	Plant a Tree	Plant a Tree	Charity Donation
<b>New Donors</b>	109	89	95	91	38
<b>Total Dollars Raised</b>	\$234,414	\$241,807	\$289,473	\$309,228	\$309,542 (YE projection)
<b>Donor Count</b>	406	442	468	499	464
<b>Participation</b>	7.3%	7.9%	8.4%	9%	8.6%

# Incentives with a Purpose

- **Incentives should always be personal.**
  - If you cannot make this connection, the value of the incentive decreases!
- **Look Inward**
  - Survey your eligible class to see what they are interested in
  - Most Z-PAC donors are long-time Zurich employees
  - Employees are committed to Zurich's mission and vision for the future
  - Tie Your PAC to your Organization's Mission and/or Goals
- **Zurich's purpose is to 'create a brighter future together'**
  - We aspire to be one of the most responsible and impactful businesses in the world.
- **What the motivation of this incentive? And is it worth it?**

# Purposeful Incentive FOUND

The **Zurich Forest** project launched in 2020 to support reforestation and biodiversity restoration in Brazil.

- Zurich is committed to planting over 1,000,000 tree seedlings within 8 years
- Regrowing trees is the first step to re-establish habitat that benefits both people in the area, by restoring water supplies, and plants and animals.
- Restore a fully self-sustaining and biodiverse forest, comprised of over 120 species of trees native to the region.




# Z-PAC Is More Than Politics

## Make the Connection – We Are Family!

- Focused on our partnership and support of the Zurich Forest project
  - Week 1: [Campaign Video](#)
  - Week 2: Image to the left
  - Week 3: Town Hall with the Forest Project & Public Policy Team
  - Week 4 – 6: Reminded them of the **Plant a Tree In Your Name** incentive and working together, being a family for change
- New Suggested Giving Levels
  - Continued or New Donors = 1 Tree
  - Giving Level Donors = 10 Trees

Z-PAC offers us a way to join together to support the election of candidates, regardless of political affiliation, who share our views and will advocate for a public policy environment that values our work.

Z-PAC | ZURICH



**Key issues at stake for Zurich**

- Meaningful progress on tort reform and social inflation
- Private sector delivery of crop insurance
- Cyber incident & ransomware payment reporting
- Decisions made by policymakers today will shape the future marketplace for us and our customers.

**Who does Z-PAC support?**


Federal and state candidates must meet one or more of the following:

- Supports business priorities and values
- Holds a position of geographic relevance to Zurich
- Supports positive policies for our industry, company, employees and customers
- Understand the importance of our industry
- Holds a leadership position or is poised to assume one

**Why are you being asked?**

Corporations are prohibited from making direct contributions to federal and many state candidates, but we may join together, individually, to help elect candidates who know and understand our unique perspective.

**Z-PAC's budget is bi-partisan**



**Z-PAC is transparent with the funds entrusted to it**

Candidate contribution lists and giving criteria can be found on the Z-PAC website.

**Who decides which candidates receive support?**

12 members who represent all areas of the company serve on the Z-PAC Board of Directors and approve our slate of candidates.



# Z-PAC Plant A Tree Campaign Results



## 2022

- 117 New Donors
- 42 Upgraded Contributions
- \$47,666 increase over previous year

## 2023

- 91 New Donors
- 36 Upgraded Contributions
- \$19,746 increase over previous year

## Two-Year Results

- **208 New Donors**
- **78 Upgraded Contributions**
- **\$67,412 increase in two years**

**We planted 5,211 trees in two years!**

# The Zurich Forest

Restoring native forest and biodiversity

**3,007** trees will be planted by the Government & Regulatory Relations team in honor of our 2022 Z-PAC members.  
**We thank you for your support!**

Planting trees is one of the biggest and simplest ways of tackling climate change. But it must be done in a targeted and responsible way to ensure it builds biodiversity, supporting a variety of wildlife and local communities.



# The Goals of an Incentive

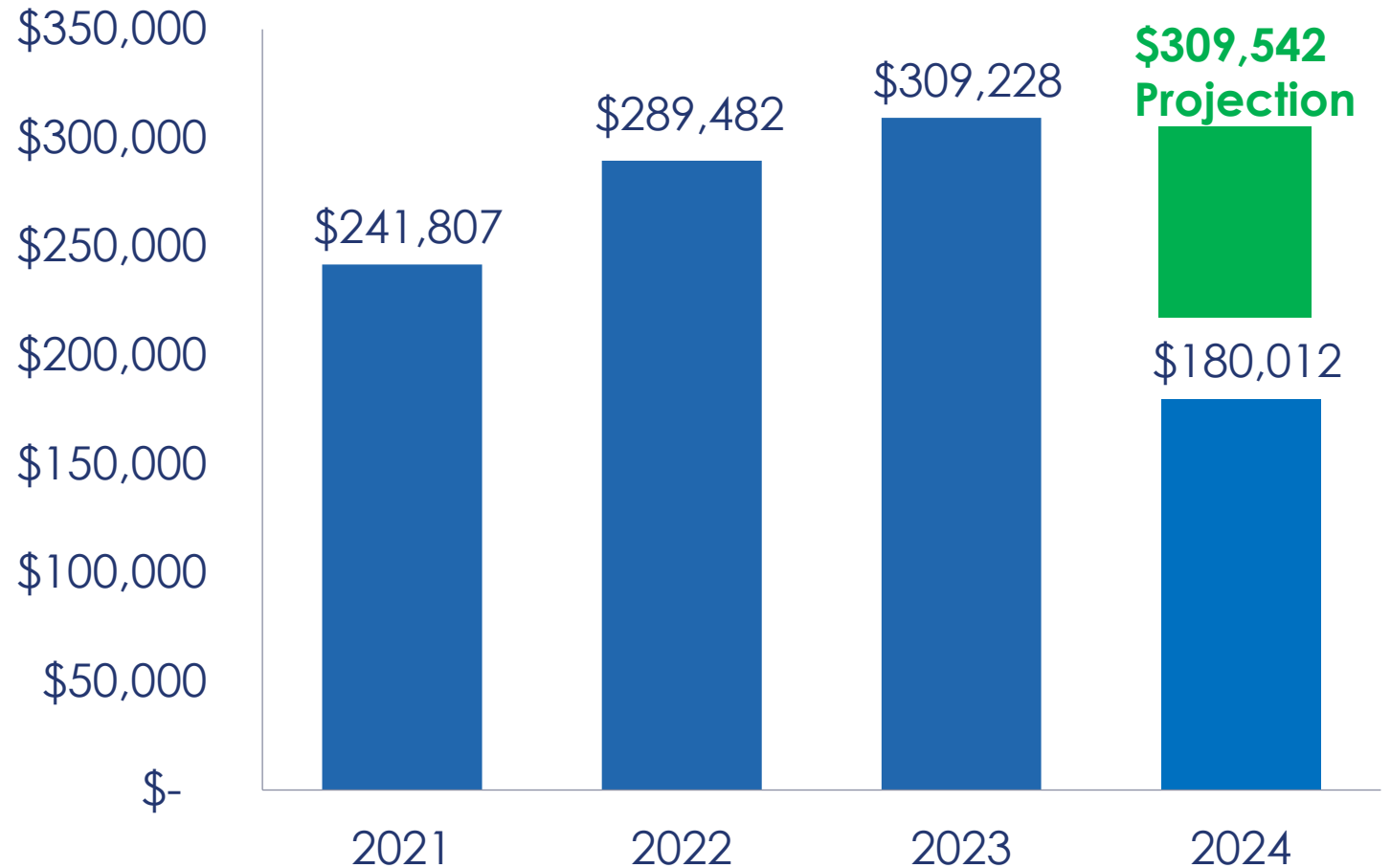
## Cycle Fundraising Goals

✗ **2020:** \$450,000 – **Missed Goal** by \$20,000

✓ **2022:** \$500,000 – **Exceeded Goal** by More than \$31,000

✓ **2024:** \$600,000 – **Projected to exceed goal** by \$18,000

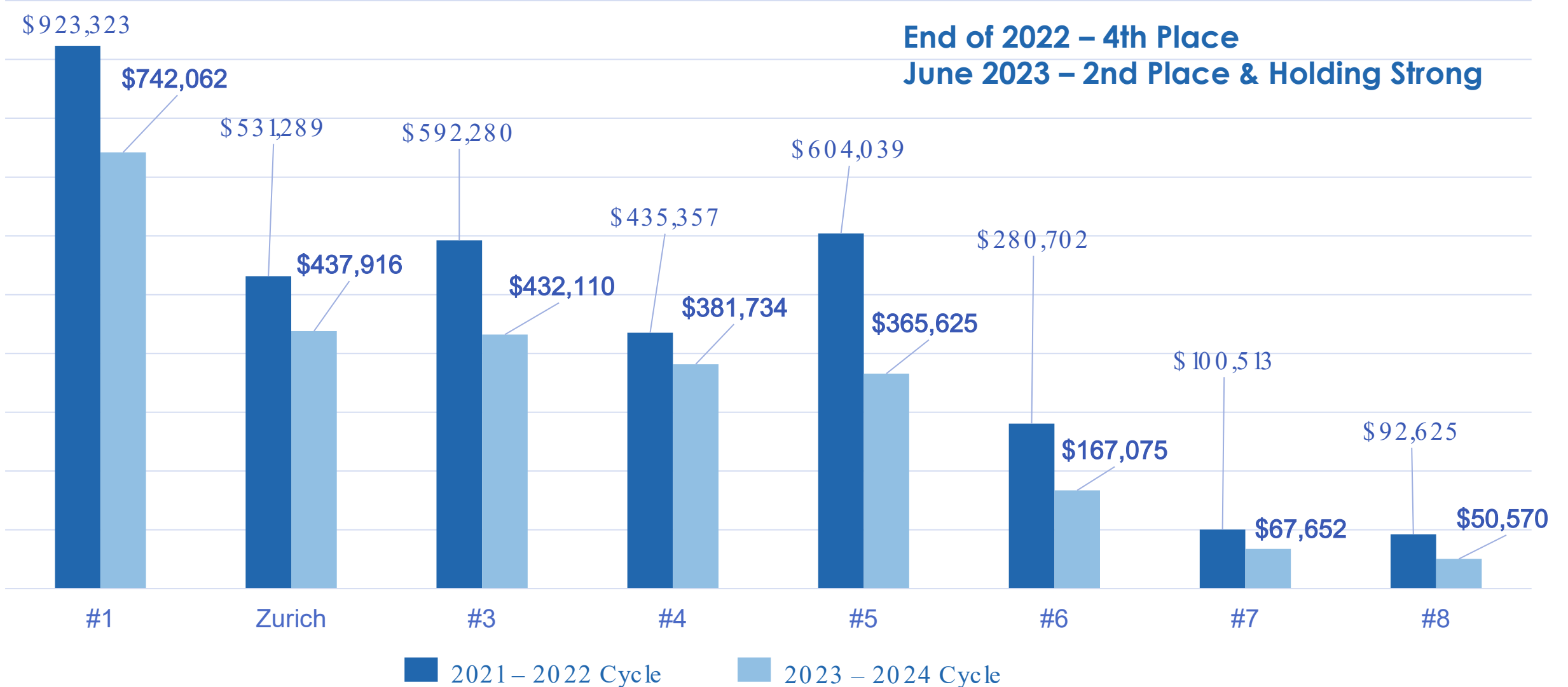
## Fundraising Results By Year





# Incentive Results

## June 2024 Industry PAC Comparison



# 2024 Donor Giveaways By Level

Giveaways per Level



Z-PAC Donor Giveaways By Level	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Levels Based on Annual Contribution Total</b>		<b>Pick 1</b>	<b>Pick 2 small</b>	<b>Pick 2 small or 1 large</b>	<b>Pick 3 small or 1 Large</b>
Z-PAC Personalized Notebook, Pen, Candy and Thank You Card	☆	☆	☆	☆	☆
Flat Wireless Mobile Charger	<b>New Donors Only</b>	☆	☆	<b>Automatic Giveaway</b>	☆
Magnetic Phone Charger with Kickstand		☆	☆	☆	☆
Skullcandy Wireless Earbuds		☆	☆	☆	☆
Portable Speaker			☆	☆	<b>Automatic Giveaway</b>
Noise Canceling Headphones				☆	☆
Top rated July Carry on Luggage, with Mobile Charger					☆

# 2024 Charity Donation

## Two Test Phases: Leadership Club & Renewals



Please choose a charity by May 15, 2024



Thank you for your charity selection:

WOMEN GIVING BACK INC  
20 EXPORT DR  
STERLING, VA 20164-4421

Thank you!

Welcome, Desta!

### Happy Birthday PASS!

In celebration of PASS' 40th year as the Nation's most experienced campaign finance compliance firm, and in recognition of your partnership throughout our 40 years in business, we would like to thank you for your continued partnership. Our PASS team voted on their favorite charities. Help us give back by selecting one of the charities listed. Click on the charity icon and submit and PASS will donate \$10 to the charity you select. Our Charity Match team will process your selection.

**40 YEARS** **PASS**  
A trusted partner since 1984



# Open Discussion

Email me at [Desta.Wallace@ZurichNA.com](mailto:Desta.Wallace@ZurichNA.com)

