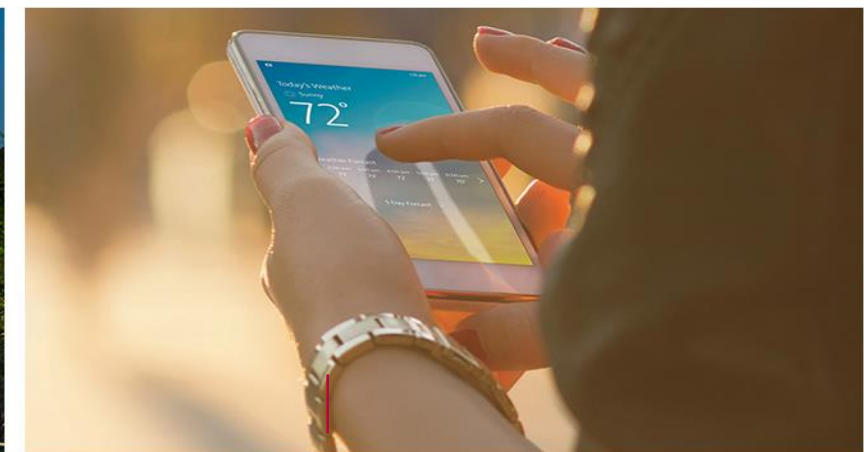


# Building a Solicitation Campaign that Works

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# Table of Contents

- ❖ Develop Solicitation Structure & Obtain Approvals
- ❖ Develop Steps for Solicitation Implementation
- ❖ Tools for Solicitation
- ❖ PAC Benefits and Incentives

# Develop Solicitation Structure & Obtain Approvals

# Develop Solicitation Structure & Obtain Approvals

## What steps should you take when implementing your solicitation campaign?

- Here are five steps to use as a guide when developing the structure of your campaign

Step 1

Research the company culture, morale, and past fundraising activities

Step 2

Meet with the head of your Government Affairs to get his/her support with doing a solicitation

Step 3

Meet with your PAC Board and/or Contributions Committee to get approval and buy-in for a solicitation

Step 4

Determine who will be the executive lead/face of the solicitation campaign

Step 5

Determine who will serve as the captains for your solicitation campaign

# Develop Solicitation Structure & Obtain Approvals *(cont'd)*

## Step 1: Research the company culture, morale, and past fundraising activities

- What is the company's internal culture and attitude towards PAC solicitations?
- Is the company experiencing negative or positive growth that affects job security?
- What were the PACs past fundraising successes and failures?
- Can you build upon past fundraising plans and/or add new strategies?

## Step 2: Meet with the head of your Government Affairs to get his/her support with doing a solicitation

- Important to (1) provide an in depth analysis of past receipts/membership and (2) projected receipts/membership if solicitation is conducted/not conducted
  - Have annual receipts increased, decreased, or stayed the same last election cycle compared to the previous election cycle? What is the reason for those results?
  - What is the projected increase if there is a solicitation conducted?
  - What is the projected decrease if no solicitation is conducted?
- Provide an analysis of disbursements to candidates from previous election cycles to determine how much funding is needed annually without completely depleting all of your funds
  - A PAC's bank account should include a cushion just in case the company experiences turbulent times (e.g., downsizing, restructuring, etc.), as these circumstances could unexpectedly affect the amount of receipts received from solicitable employees and deter your ability to conduct a solicitation due to low morale



# Develop Solicitation Structure & Obtain Approvals *(cont'd)*

## Step 3: Meet with your PAC Board and/or Contributions Committee to get approval and buy-in for a solicitation

- Present the same data from steps 1 and 2 to your PAC Board and/or Contributions Committee to build the case for a solicitation
- In most cases, your PAC will decrease, or at minimum, stay stagnant if you do not conduct a solicitation at least every two years – always take into account your company's attrition rate

## Step 4: Determine who will be the executive lead/face of the solicitation campaign

- Head of Government Affairs or PAC Manager to recruit top executive to be the lead/face for the solicitation campaign
  - Examples: CEO, Vice Chair, Chief Administrative Officer, etc.

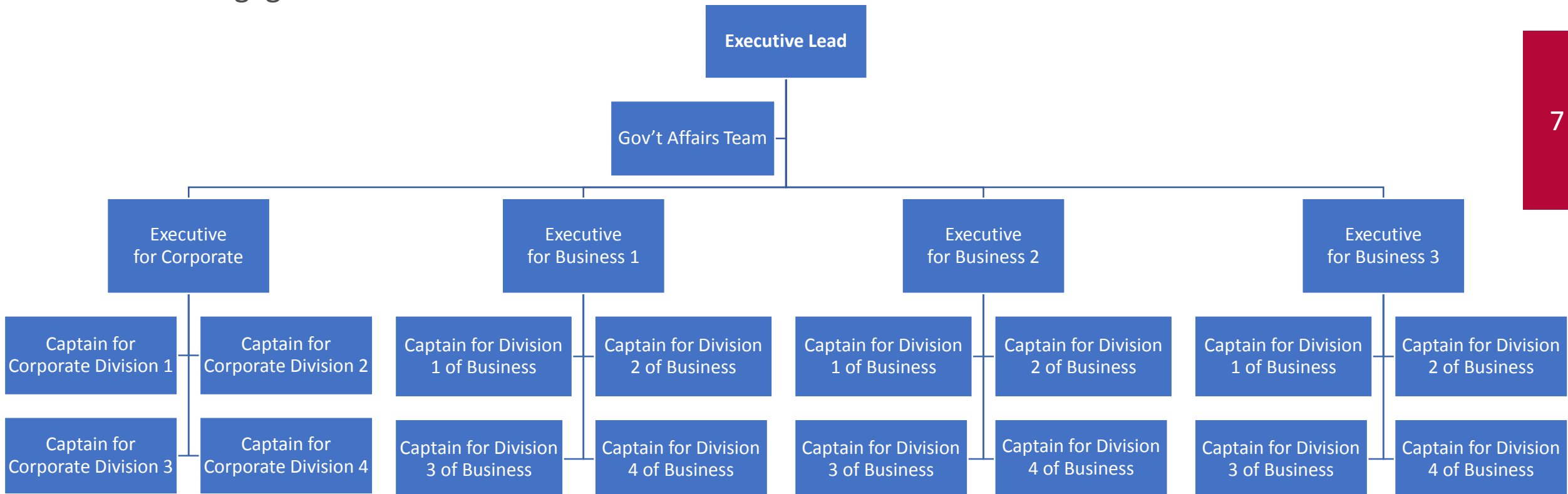
## Step 5: Determine who will serve as the captains for your solicitation campaign

- Have the senior executive for each business ask their division general managers/functional officers to volunteer to serve as captains for the solicitation or delegate the responsibility to another employee(s) who is willing to be a captain(s)
- Captains are very important – employees are more likely to respond positively to colleagues they know and have interaction with on a regular basis in their business area

# Develop Solicitation Structure & Obtain Approvals *(cont'd)*

## Sample Solicitation Campaign Structure

- Developing a structure for your company's PAC solicitation is critical; one size does not fit all
- All companies are different, need to make sure you know the approval process, and who you need to engage to conduct a successful solicitation



# Develop Steps for Solicitation Implementation



# Develop Steps for Solicitation Implementation

## How many touches does it take to get a contribution? What do we do?

- We communicate/touch our solicitable employees several times to educate and entice them to contribute to the PAC

### Step 1

Week 1: Email from top executive (e.g., CEO, Vice Chair, CAO, etc.) to all solicitable employees with solicitation video

### Step 2

Week 2: Email from each Business Executive/Executive for Corporate to their solicitable employees

### Step 3

Week 3: Email from each Business Division Captain/Corporate Division Captain to their solicitable employees

### Step 4

Weeks 4-8: In-person or WebEx Presentations from each Business Division Captain/Corporate Division Captain to their solicitable employees

### Note:

*Note: Government Affairs team to travel to HQ and business facilities to do presentations, as well as assist captains with presentations as requested/needed*

# Develop Steps for Solicitation Implementation (*cont'd*)

## Step 1 (*Week 1*): Email from Top Executive (e.g., CEO, Vice Chair, CAO, etc.)

- Audience – all solicitable employees
- Content of Email – prepared by PAC Manager/ Approved by Head of Government Affairs
  - (1) COREPAC overview, (2) Contribution importance and guidelines, (3) General issues that impact the company, (4) Educational solicitation video

## Step 2 (*Week 2*): Email from the Executive of Each Business/Executive for Corporate

- Audience – solicitable employees for each business/Corporate
- Content of Email – prepared by PAC Manager/ Approved by Head of Government Affairs
  - (1) COREPAC overview, (2) Contribution importance and guidelines, (3) Business/Corporate specific issues that impact the company

# Develop Steps for Solicitation Implementation (*cont'd*)

## Step 3 (*Week 3*): Email from Captains for each Business Division/Corporate Division

- Audience – solicitable employees for each business division/Corporate division
- Content of Email – prepared by PAC Manager/ Approved by Head of Government Affairs
  - (1) COREPAC overview, (2) Contribution importance, (3) Business division/corporate division specific issues that impact the company
  - Captains: Most beneficial step because their employees are likely to have more interaction with them on a daily/weekly basis – easier to connect/relate to people you see more and who are in your specific business area

## Step 4 (*Weeks 4-8*): In-Person / WebEx Presentations by Captains of each Business Division / Corporate Division (*Government Affairs team would prepare materials and help facilitate this*)

- Audience – solicitable employees for each business division/Corporate division
- Content of Presentations – prepared by PAC Manager/ Approved by Head of Government Affairs
  - (1) Educational solicitation video, (2) COREPAC overview, (3) contribution importance and guidelines, (4) General issues and division specific issues that impact the company (*note: more details in Tools for Solicitations slides*)

## Note: Government Affairs team to travel to HQ and business facilities to do presentations and assist with presentations as requested/needed by Captains

- At least 2 in-person presentations at Corporate Headquarters; at least 1 at each business HQ
- Facilities to be visited on an as needed basis

# Tools for Solicitation

# Tools for Solicitation

**Motion Graphics Video – Benefits and Challenges/Pitfalls**

**PowerPoint Presentation for In-Person Meetings/WebExes**

**FAQs**

**Do's and Don't for Discussion with Employee**

# Tools for Solicitation

## Motion Graphics Video Benefits

- A motion graphics video's shelf life is usually longer than a live video
  - After a featured employee retires or featured politician leaves office, the video's shelf typically expires
- Elevates the mission of the PAC versus the perception of elevating a particular candidate
  - Less likely to deter someone that is not a fan of that specific politician or political party
- Educates employees about a company's story and how the PAC relates to it in an interesting and engaging way; data suggests that it drives action and higher engagement from emerging leaders – 30s and 40s
  - Some peer companies have had a ~7-8% increase in participation with this demographic of contributors by using the motion graphics video as a tool to solicit contributions (*please note that internal and external factors can majorly impact the outcome*)
  - Key to COREPAC's fundraising success in 2018 will be its ability to successfully engage emerging leaders in the expanded solicitable class to become first time PAC contributors/members
- Note: start early in finding a good consultant to produce the motion graphics video, so you can get the cost in the PAC budget the year before when the budget process happens



# Tools for Solicitation

## Video Production Challenges / Pitfalls

- Planning ahead and anticipating obstacles during video production is the key to success
- Important to get necessary approvals for each step – Examples: Government Affairs Head, His/Her Boss, Corporate Communications, Legal, etc.
- For smooth motion graphics video production, it will take at least 3 months
- Each step needs finalized in the order listed below to stay on schedule and on budget
  - Should include fourth month for unexpected delays/internal roadblocks.
  - Production Steps:
    - Phase 1 – Brainstorming to develop script
    - Phase 2 – Draft/review/edit/finalize script
    - Phase 3 – Style frames/Story Board
    - Phase 4 – Review/edit/finalize motion graphics/animation video

# Tools for Solicitation

## PowerPoint Presentation for In-Person Meetings/WebExes

- Topics to Include
  - Special Notice
    - Specify the presentation is intended only to solicitable employees and that no employees are obligated to contribute
    - Insert language provided by your company's legal counsel
  - What is the PAC?
    - Motion Graphics Video
    - Background and purpose
    - Emphasize illegal for corporations to contribute to federal candidates, and importance of solicitable employees contributing to the PAC
  - What has the PAC done for the company?
    - Focus on the PAC helping promote and protect the interests of the company and its employees by supporting candidates that agree with them on issues critical to the company's success
    - List federal issues important to the company; show table of issues under each business segment (sample on next slide)
  - Why should I contribute to the PAC?
    - Talk about the PAC giving employees a collective voice; show a visual comparison on how your company's PAC compares to other company's in your industry to show the need to raise more money to play a larger role in who gets elected
    - Provide a brief analysis/visual of your PAC receipts/membership – can be very effective at showing the importance of contributing
  - How much should I contribute to the PAC?
    - Provide an average contribution for each pay grade/band level
    - Suggest a specific percentage or dollar amount

# Tools for Solicitation

## Sample Slide: Importance of Contributing

### Actions made by Congress have a huge impact on our company

- Need elected officials that share our values and agree with us on legislation, policies, and government regulations that impact the company
- Need elected officials who understand the importance of [insert statement specific to your company industry and the role it plays in the economy and everyday lives]

Here are some issues that greatly impact [Insert Company name]’s businesses and our industry:

Taxes	Telecom	Trade	Trade Secrets	Environment	National Institutes of Health Funding	Investment Initiatives
Insert Issue 1	Insert Issue 1	Insert Issue 1	Insert Issue 1	Insert Issue 1	Insert Issue 1	Insert Issue 1
Insert Issue 2	Insert Issue 2	Insert Issue 2	Insert Issue 2	Insert Issue 2	Insert Issue 2	Insert Issue 2
Insert Issue 3	Insert Issue 3	Insert Issue 3	Insert Issue 3	Insert Issue 3	Insert Issue 3	Insert Issue 3

# Tools for Solicitation

## FAQs should include the following:

- What is a corporate PAC?
- Why should I support the company's PAC?
- How can I contribute?
- I want to contribute; How much should I give?
- How does the PAC select candidates to support?
- Why should I contribute through the PAC rather than directly supporting a specific candidate?
- Who is eligible to contribute to the PAC?
- How do I contact the PAC?

# Tools for Solicitation

## Do's and Don'ts for Discussion with Employees:

- Do's
  - Emphasize goal to increase PAC participation and that no contribution is too small
  - Always include disclaimer – contribution voluntary, promotion or bonus not affected, right to refuse to contribute without reprisal, and not tax deductible
  - Will keep contribution confidential, but it is reportable to the FEC if total exceeds \$200 in calendar year
  - Specify eligibility requirements – eligible pay bands / U.S. Citizen or Permanent Resident (green card holder)
  - Use presentation materials to urge PAC participation (PowerPoint, video, website, FAQs, etc.)
  - Provide website log in directions and direct technical issues to PAC Manager
  - Direct any questions that you don't know the answers to the PAC Manager
- Don'ts
  - Coercive or threatening language to pressure contribution
  - Soliciting non-solicitable employees
  - Soliciting unionized employees (*some company's do this, but strict requirements; check with your legal counsel*)
  - Accepting contributions on behalf of the PAC (should always direct employees to website or PAC Manager)

# PAC Benefits & Incentives



# PAC Benefits and Incentives

## What PAC benefits and incentives does your PAC offer to donors/members?

- Information Updates
- Gifts/Incentives
- PAC events

### Informational Updates

- Annual Reports, Periodic newsletters and email updates keep employees engaged with the PAC

### Gifts/Incentives

- Signed Books, mugs, badge reels, paper weights, backpacks, branded plaques, coasters, customized gift cards, flags flown over the Capitol Building, lanyards, mouse pads, parking spot closer to building, pen with stylus, scarfs, stress balls, ties, travel mugs, umbrellas, water bottles, White House ornaments, etc.
- PAC Match – many PACs have reported this benefit to be very effective at obtaining new donors
- Subscriptions: National journal, Cook Report

### Invitations to Events:

- PAC members will be incentivized to contribute if they are invited to attend special events with public officials/candidates
- Networking Opportunities, lunch with CEO/Senior Executive

# Questions/Comments

## Contact information

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**Thank you!**