

# Tips for Successful PAC Management

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# AUDITING & STRATEGIC PLANNING

The more you know, the more you'll grow.

- Analyze data
- Identify strengths
- Understand your challenges
- Map out important strategies
- Secure resources and support



# AUDITING YOUR PAC

	Compliance Audit	Financial Audit	Operational Audit
Ensure compliance with federal/state laws	X		
Make sure reports reflect accurate amounts	X	X	
Review internal controls and safe harbor adherence	X	X	X
Assess why fundraising has stalled			X
Determine if you are “keeping up with the Joneses”			X
Validate the need for new programs and/or resources			X

# AUDITING AND ASSESSING YOUR ACTIVITIES

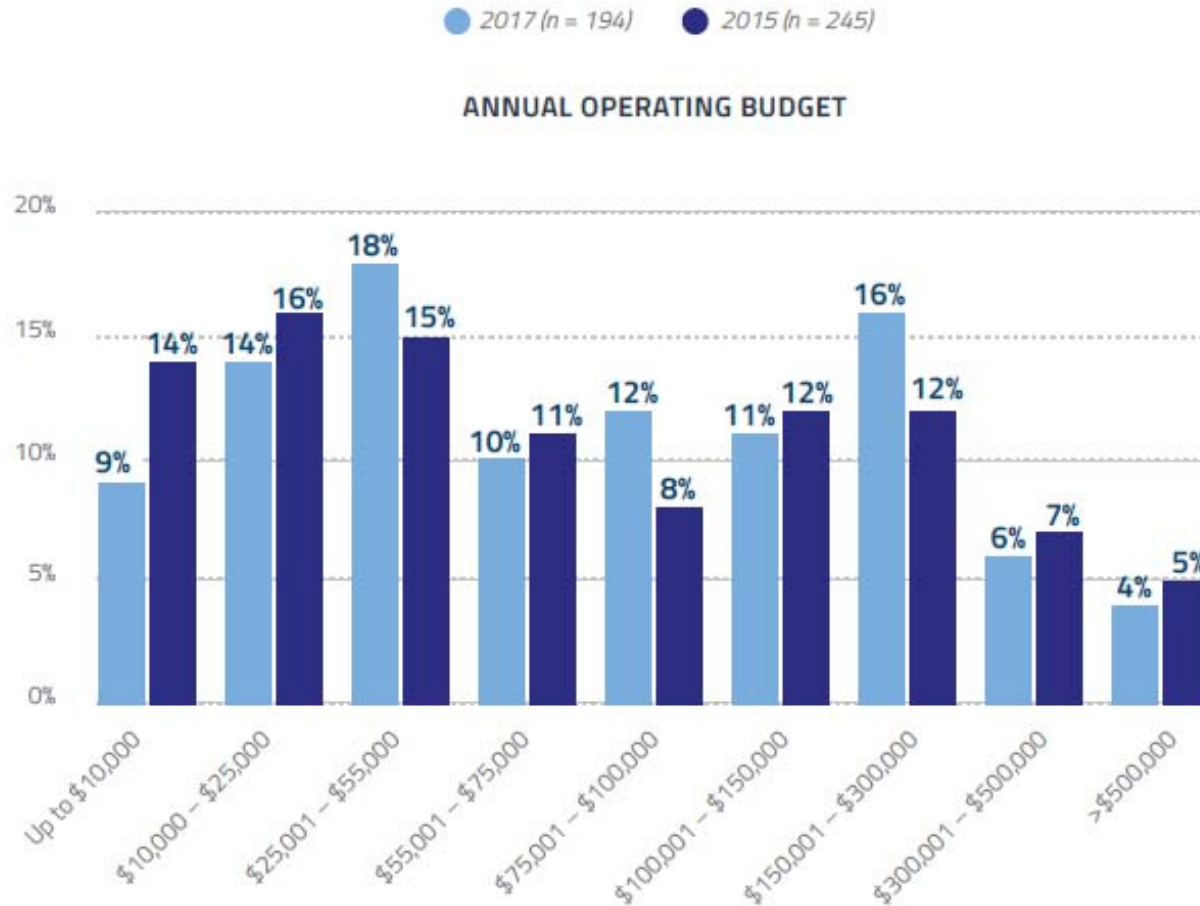
## Things to review:

- PAC board structure, roles
- Bylaws
- Candidate contribution criteria
- Mission statement
- Education efforts
- Messaging
- Recruitment
- Recognition

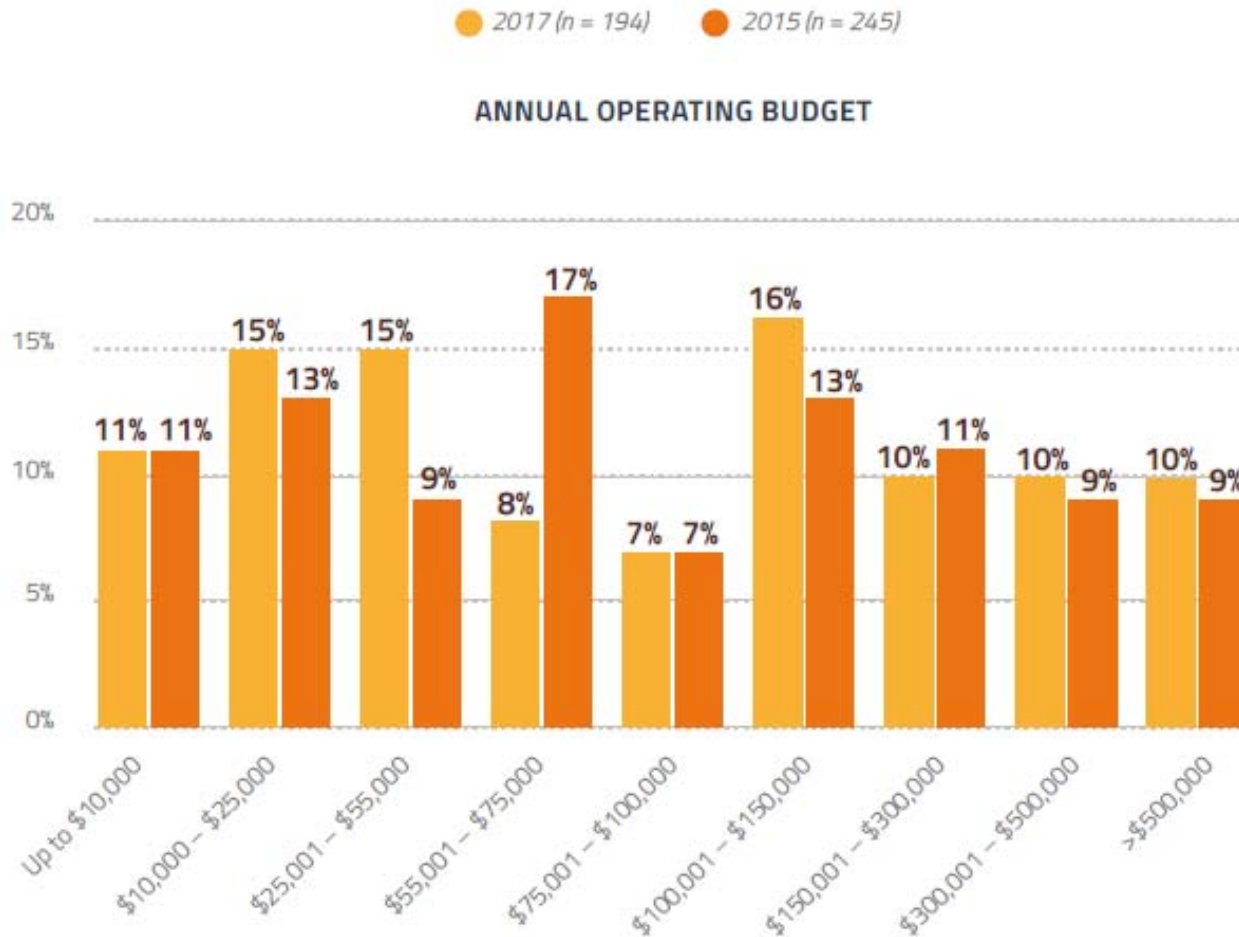
## How to conduct a review:

- Getting feedback from peers
- Benchmark your PAC
- Using other departments
- Strategic discussions with board
- Annual review period

# BUDGETING AND RESOURCE ALLOCATION: CORPORATE PACS

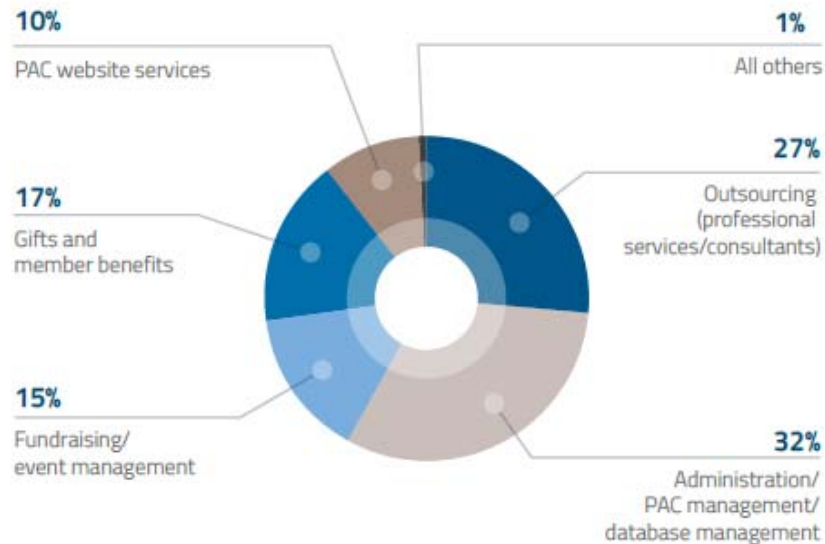


# BUDGETING AND RESOURCE ALLOCATION: ASSOCIATION PACS

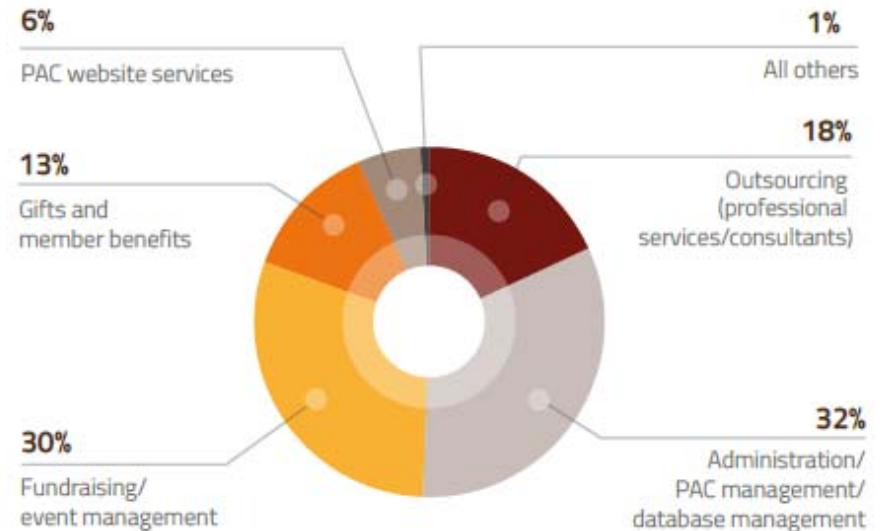


# BUDGETING AND RESOURCE ALLOCATION

## Corporate PACs:



## Association PACs:



# BUILDING A RECRUITMENT PLAN:

## Who may be solicited by a **corporate PAC**:

Corporation's executive and administrative staff (managerial, professional, supervisory responsibilities)

Shareholders

Families of both groups

## Who may be solicited by a **individual membership association PAC**:

Executive and administrative staff (same definition as above)

Non-corporate members

Families of both groups

## Who may be solicited by a **trade association PAC**:

Executive and administrative staff (same definition as above)

Non-corporate members

With prior approval—corporate members' executive and administrative personnel

Stockholders

Families of both





# WHAT CONSTITUTES A SOLICITATION:

## What is **NOT** a solicitation:

- Historical
- Factual
- Statistical

## What **IS** a solicitation:

- Asking for money
- Sharing of member benefits
- Identifying the goals of the PAC
- Adjectives and adverbs



*All solicitations must include required disclaimers*

# AVOIDING COERCION:

## Beware, coercion may include:

Suggestions that an employee's supervisor will know whether the employee contributes to the PAC

Use of words that indicate contribution is a condition of employment (e.g., "must" or "expected to" contribute)

Suggestions that contributing will affect opportunity to advance within the company (i.e., don't discuss promotions or compensation)

Public or private communication about the need for a specific person to contribute to win a competition or fundraising challenge

Suggestions that PAC fundraising efforts are similar to charitable drives

# AVOIDING COERCION:

## Other things to avoid:

Suggest PAC helps get specific legislative action (quid quo pro)

Soliciting those who you have directly authority over

Answering questions you don't have the answer to



# BUILDING A RECRUITMENT PLAN:

Corporate PAC Contributors	Median Participation Rate	Median Annual Contribution Amount
Overall	16%	\$556
Senior management	78%	\$1,684
Restricted class/salaried employees	12%	\$384
Corporate board	89%	\$3,292

Association PAC Contributors	Median Participation Rate	Median Annual Contribution Amount
Overall	18%	\$400
Association staff senior mgmt.	95%	\$1,053
Association staff (non-senior management)	60%	\$317
Association board	90%	\$1,320
All other members	15%	\$337

# WHO DO YOU NEED ON YOUR TEAM:

## Executive Champions

Leverage strengths, schedule

Find the right connection point

Develop reporting mechanisms

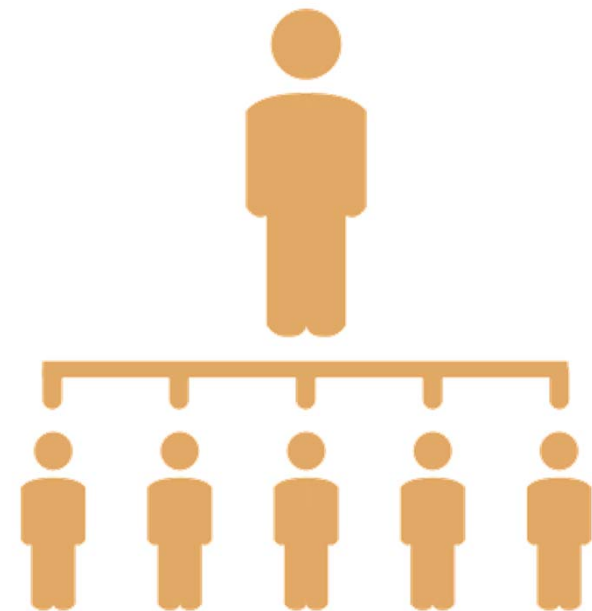
**Associations:** Elected leaders are critical

**Corporations:** CEO/sr. management involvement corresponds with PAC size

## Peer Champions

Effective educators as well as messengers

Create a sense of community



# QUESTIONS AND DISCUSSION

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