

Measuring and Communicating the Value of Your PAC



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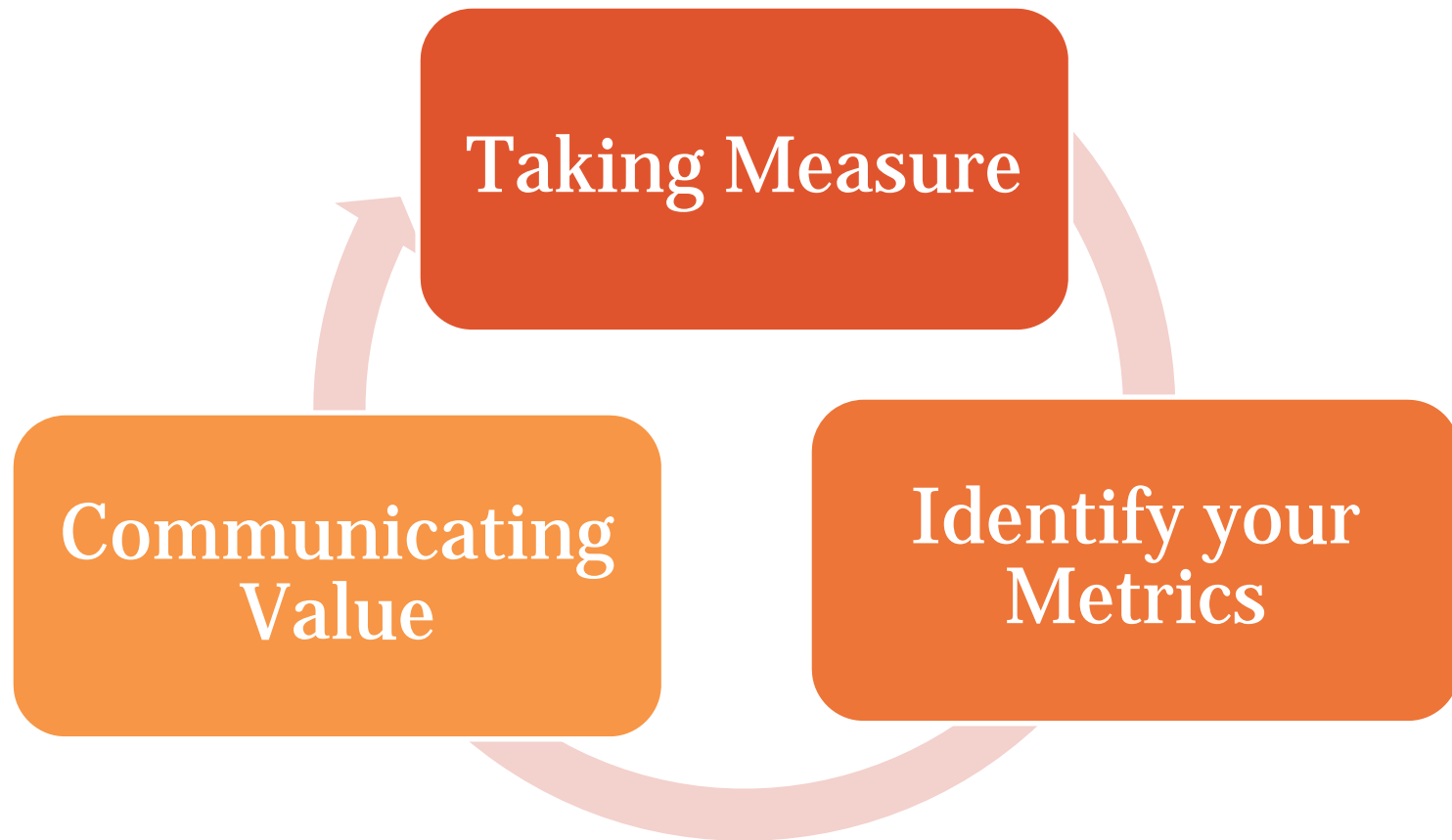
Manager, PAC and Advocacy Practice

Expertise:

- Campaign Finance
- Grassroots
- Political Action Committees
- Political Involvement



Today's Agenda



Measurement

Doing More With Less

PACs Are Lean Operations

Of the 197 responding PACs in the survey, the median PAC receipts (\$442,004) increased by 7 percent since the 2013-2014 election cycle (\$412,913). However, staffing and resources went largely unchanged during that same period.

Why Are Metrics So Important?



Gain resources (& allocate them)



Increase buy-in & monitor reputation



Goal setting & strategic planning



Demonstrate value & increase efficiency

What Does a Good Measurement System Tell You?



Are you meeting your PAC and organization's goals?



What do your stakeholders think?



What efficiencies can you find?



Do you have the resources you need to do your job?

Get Buy-in On Your Measurement Process

Talk to:

- Senior management
- Government affairs colleagues
- Business units/state chapters

Find consensus:

- What you are measuring?
- How you are measuring it?
- Who's accountable?



Fit your measurement (and reporting!) system to your organization's culture

Metrics

Tried and True Metrics

- Total dollars raised
- Total disbursements
- Disbursement success rates
- Participation rates
- Split in partisan giving



Track percentage **growth**, not just the numbers

Metrics

Receipts

- Total receipts
- Growth in receipts over time
- Growth in average contribution amount over time
- Total receipts compared to competitors' PACs
- Receipts compared to administrative budget
- Amount/Average contributed
 - Amount contributed by senior management / title / board
 - Amount contributed by segment (divisions, departments)

Metrics

Donors

- Total number of donors (and growth over time)
- \$5,000 “maxed-out” donors
- Donors at each club / incentive level
- New donors (first-time or lapsed)
- Number of lapsed donors
- Donor retention rate
- Donors that increased their contribution
- Donors that moved to a higher incentive club / joined a club level
- Donors by career level (students, residents, future leaders)
- Total \$200+ (itemized) donors compared to competitors’ PACs

Metrics

Participation Rates

- Overall participation rate and its changes over time
- Participation rate by segment (division, chapter, department)
- Participation rate by senior management or board of directors

Financial

- Number of contributors who paid via payroll deduction vs. check
- Donors who gave through PAC Match = total charitable giving

Peer Champions

- Number of PAC peer-to-peer champions or ambassadors
 - Number of **new** champions and ambassadors

Metrics

Disbursements and Political Involvement

- Number of candidates supported who won (percentage success rate)
- Total dollars spent that went to winning candidates
- Total dollars spent compared to competitors' PACs
- Bipartisanship
- Outreach
 - Number of fundraisers attended
 - Number of checks delivered in district/by members
 - Number of site visits
- Number of pro-organization/pro-industry candidates in office
 - Number of **new** candidates elected to office/highlight early support
 - Candidates supported who won in **toss up** races

Metrics for Engagement

Donor Engagement

- PAC communications sent
- Peer-to-Peer or PAC champions program growth
 - New recruits
 - Number of peer solicitor presentations/solicitations
- Number of donor recognition opportunities offered
- Average time for a thank you to go out
- Number of eligibles that participate in PAC events, briefings, teleconferences
- Number of PAC presentations given
- New campaigns or programs launched

Taking Stock



Scan of industry trends / Best-in-class PACs



Benchmarking with peers, within industry

Industry Trends

Leadership Involvement

- *Association PACs*
 - Member Leaders:
 - 69% makes presentations at or opens solicitation meetings
 - 69% signs or sends solicitations
 - 66% solicits association board
- *Corporate PACs*
 - CEO's:
 - 74% max out
 - 67% formally endorse the PAC
 - 63% sign or send solicitations

Benchmarking

- Formal/informal benchmarking options
 - 2017 Corporate and Association PAC Benchmarking Reports
 - FEC.gov
 - Center for Responsive Politics (Open Secrets)



PAC Contributions to Federal Candidates

Election cycle:

Total Amount:	\$9,222,033	
Total to Democrats:	\$3,521,500	(38%)
Total to Republicans:	\$5,695,533	(62%)

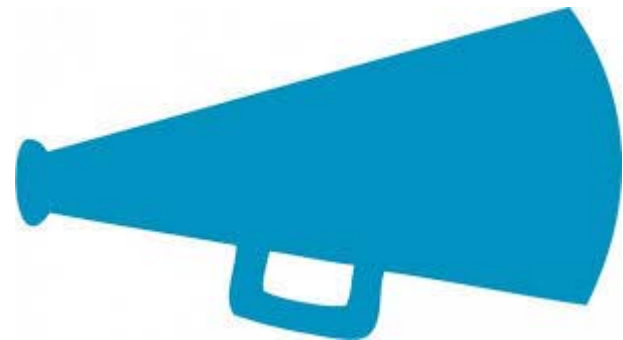
PAC Name	Affiliate	Total	Dems	Repubs
Lockheed Martin		\$2,534,750	\$966,500	\$1,566,250
Boeing Co		\$2,154,000	\$932,000	\$1,222,000
Northrop Grumman		\$2,135,500	\$841,500	\$1,292,000
United Technologies		\$1,192,125	\$427,500	\$764,625
BAE Systems		\$610,500	\$237,500	\$372,000
Triumph Group		\$177,000	\$36,000	\$141,000
Rockwell Collins Inc		\$132,000	\$26,000	\$106,000
Aerojet Rocketdyne		\$124,625	\$36,500	\$88,125

Communicating Value

Have a Communications Plan

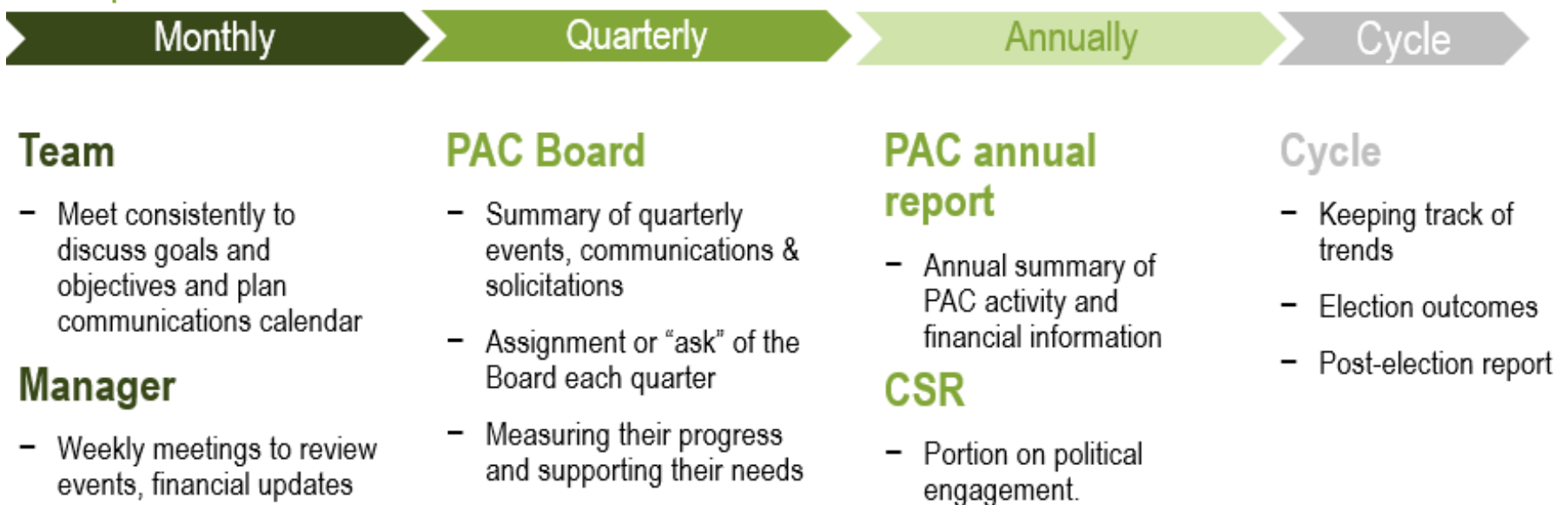
Have a plan and stick to it!

- Dedicated reporting to key stakeholders
- Mimic other functions' reporting mechanisms
- Status reports on major campaigns/initiatives
- Talking points for leadership



Have a Communications Plan

Example:



Reporting Out

2013 - 2014 Political Disbursements / Election Review

American Association of Orthopaedic Surgeons

Thanks to the generous support of PAC donors, the Orthopaedic PAC enjoyed tremendous success on election night. The PAC was involved in over 230 congressional races this election by supporting pro-physician incumbents, challengers and candidates in open seats.

In House races, the PAC enjoyed an 88 percent success rate in 213 races. Similarly, in the upper chamber, out of 22 races, 20 of those were won by incumbent members or candidates supported by the Orthopaedic PAC. In total, the PAC disbursed just over \$2.2 million across 22 Senate races and 213 House races.

Senate Totals:

Races:	22*
Open seats:	5
Challengers:	5
Democrats:	6
Republicans:	20
Primary Losses:	3
General Losses:	2
Total Losses in 2014 Cycle:	5
Losses in Races Rated Tossup (on November 4):	1
Wins in Races Rated Tossup (on November 4):	7
Total Senate Wins:	20

*Multiple candidates were supported in some races

House Totals:

Races:	213
Open seats:	22
Challengers:	7
Democrats:	80
Republicans:	133
Primary Losses:	10
General Losses:	13
Total Losses in 2014 Cycle:	21
Losses in Races Rated Tossup (on November 4):	7
Wins in Races Rated Tossup (on November 4):	4
Total House Wins:	189

U.S. House of Representatives:

STATE/DISTRICT	MEMBER/CANDIDATE SUPPORTED BY PAC	ELECTION OUTCOME
ALABAMA		
AL-02	Martha Roby-R	Elected
AL-03	Mike Rogers-R	Elected
AL-06	Chad Mathis, MD-R (Candidate)	Defeated in Primary
ARIZONA		
AZ-02	Ron Barber-D	Defeated via recount
AZ-04	Paul Gosar-R	Elected

2016 Annual Report



**Our Company. Our Voice.
Our Future.**

A message from Tracy Bridge, Chair, CenterPoint Energy Political Council

I am pleased to share our 2016 CenterPoint Energy Political Action Committee (CNPPAC) annual report, which includes summaries of our state and federal activities and a list of candidates we supported. CNPPAC is bipartisan; we contribute to candidates of both political parties. CNPPAC supports candidates

who share our business objectives so that we can operate, serve and grow. In 2016 we contributed to 218 candidates at all levels of government. I hope you will take the time to review our report to see which candidates we supported in your state and community.

We continue to face significant legislative and regulatory challenges in our industry, and each election cycle is critical. Our elected representatives are making difficult choices that could fundamentally affect the pursuit of our vision to lead the nation in delivering energy, service and value.

As chair of our political council, and through my interactions with elected officials, I see firsthand how decisions are made that impact our ability to grow and to serve.

Thank you for your support!

Tracy Bridge

Inside

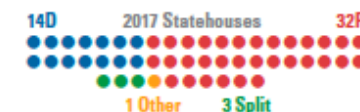
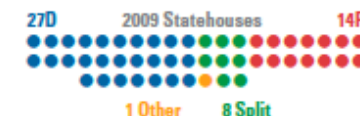
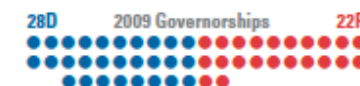
PAC membership	2
Federal affairs	3
State highlights: Arkansas, Louisiana	4
Minnesota, Mississippi	5
Oklahoma, Texas	6
Local government relations	7
Political Council members	11

Campaign count by party



To view last year's CNPPAC disbursements, [click here](#).

Shift in party control since 2008 election:



Reporting Out

Cobham PAC 2016 Recap

COBHAM

PAC MEMBERS



PAC MATCH

Giving **\$109,632.65** to over **100** unique charities

2016 Top Charities

- Wounded Warriors
- Make a Wish Foundation
- St. Jude Children's Research Hospital
- Special Olympics

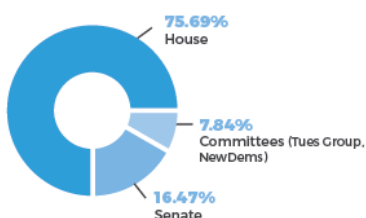
PAC BOARD



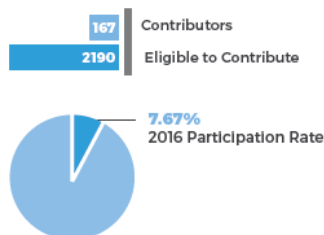
Mike Barbero - Sr. VP, Washington Operations and Government Relations
Julie Sutton - Senior Director, Government Relations
Jim Barber - Sr. VP IES Business Unit, CAES
Robert Dunaway - American Director - Sales, CCC

Andy Graven - Sr. VP, MES, CAES
Ken Kota - Sr. VP Business Development and Technology, CMS
Bill Martin - VP Worldwide Sales, CCC

DISBURSEMENTS: \$128,500



2016 YEARLY TOTAL: \$113,468.73



Building Trust in Politics to Protect Our Future

I understand that 1) Contributions to Cobham PAC are strictly voluntary; 2) I may refuse to contribute without reprisal; and 3) all contributions to Cobham PAC are for political purposes. I am free to give more or less than the suggested guideline, or not at all, without reprisal. I am U.S. citizen or foreign citizen admitted for permanent U.S. residence. I understand that federal law requires Cobham PAC to make its best effort to report to the Federal Election Commission the name, address, occupation and name of employer, date and amount for each individual whose contribution exceeds \$200 per calendar year. Contributions to Cobham PAC are not deductible for federal income tax purposes.



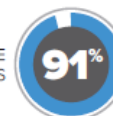
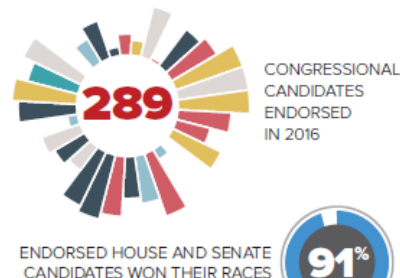
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NFIB
The Voice of Small Business.

2016 ELECTION BY THE NUMBERS

NFIB PAC ENDORSEMENTS



NFIB MEMBERS NEWLY ELECTED TO CONGRESS



NFIB MEMBERS RE-ELECTED TO CONGRESS

MEMBER COMMUNICATIONS



NFIB sent nearly **325,000** voter guides to all members in 50 states.



205,500 recorded get out the vote calls were delivered to members across the nation.



National GOTV email was sent to nearly **175,000** members the day before Election Day.



NFIB hosted **8** Senate candidate and **5** Presidential candidate TeleForums for members.



204 #SmallBizVoter tweets garnered **29.6** million impressions for the @NFIB Twitter handle

NFIB PAC CONTRIBUTIONS

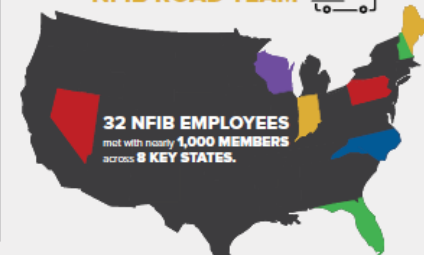


NFIB's PAC contributed nearly **\$800,000** directly to federal candidates.



NFIB's PAC spent **\$650,000** on radio ads for Senate candidates in IN, PA, NV.

NFIB ROAD TEAM



Reporting Out



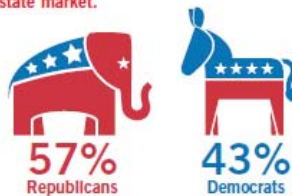
2016 ELECTION CYCLE

RPAC The #1 trade association political action committee in the nation

NAR advocates for public policy initiatives that result in continuing a fundamentally sound and dynamic U.S. real estate market.



100%
President's Circle targets won their races



Federal PAC disbursements
RPAC disbursed \$5.2 million in federal races. We won 97% of our races and RPAC is the most bi-partisan major PAC in the country

\$4,395,500
in President's Circle dollars.

1,125
President's Circle Members

Average trade association PAC participation is 13%
RPAC has more than DOUBLE that!
Participation in RPAC rose to an outstanding 33%

RPAC raised
\$60,055,390

*Total includes RPAC and PAF monies received at local, state and national levels, President's Circle, Corporate Ally Program, and REALTOR® Champion events.

RPAC had
8,244
Major Investors

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Common RPAC Myths

Investing in RPAC doesn't have to be complicated, but there are doubters among us. It is not that they don't care. They just need enlightenment. They may have bought into some of the myths that surround RPAC as a reason not to invest.

So, let's take a few steps toward enlightenment by correcting some of the myths about RPAC.

Myth #1: RPAC is partisan.

Reality: RPAC selects candidates who share our philosophy and who will listen to the REALTOR® viewpoint. Political affiliation is not considered. In election cycle after election cycle, RPAC contributions are nearly evenly split between Republican and Democratic candidates.

Myth #2: I don't need to contribute because my dues dollars already pay to lobby our issues.

Reality: Federal election law requires that direct contributions to federal candidates be made with "hard" dollars, or personal contributions. NAR cannot use dues dollars for these direct contributions. And candidates who become office holders are the ones who decide issues.

10

Myth #3: My RPAC investment is only important in election years.

Reality: Candidates need to begin fundraising in the off year leading up to the election so they are properly prepared when their election year comes around. Your RPAC investments are especially critical as we work to prevent burdensome tax hikes on real estate as state and local governments search for ways to shore up their overly stressed budgets.

Myth #4: I don't have any say in where my RPAC investment goes.

Reality: RPAC is a bottom up organization. State and local associations work closely with the national RPAC Disbursements Trustees Committee to determine which candidates will be supported.

Support is based on these recommendations and the candidate's voting records and other measurements of support for REALTOR® issues.

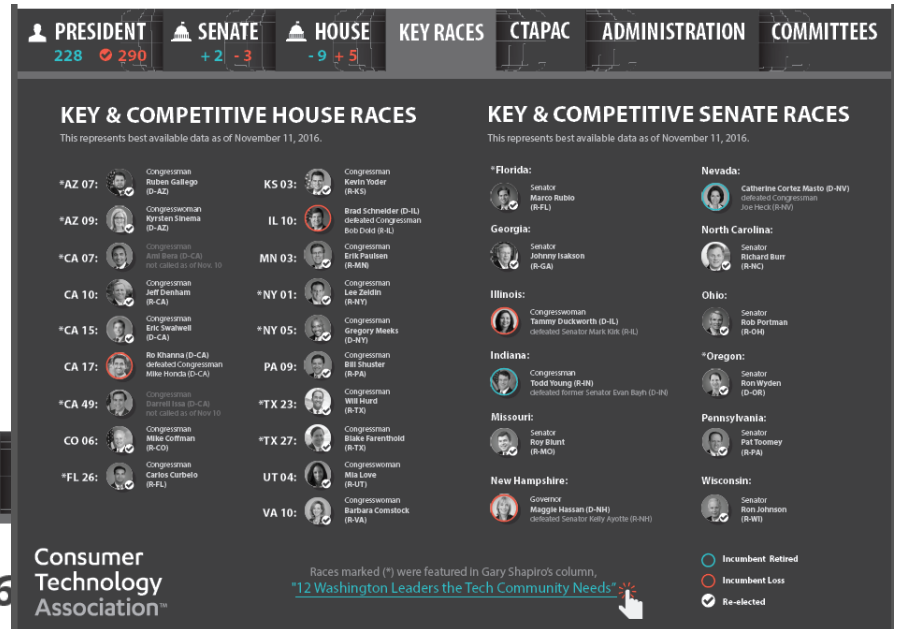
Myth #5: RPAC buys votes, adding to my distrust of politics.

Reality: RPAC does not buy votes. PERIOD.

We want to be sure our elected officials fully understand the importance of REALTOR® issues. RPAC gives us a foot in the door by allowing REALTORS® and NAR staff to attend fundraisers where they can establish relationships in a casual environment. Establishing those relationships allows us a chance to present our issues to lawmakers. However, there is no guarantee they will agree, and in fact no elected official will always agree with us every time.

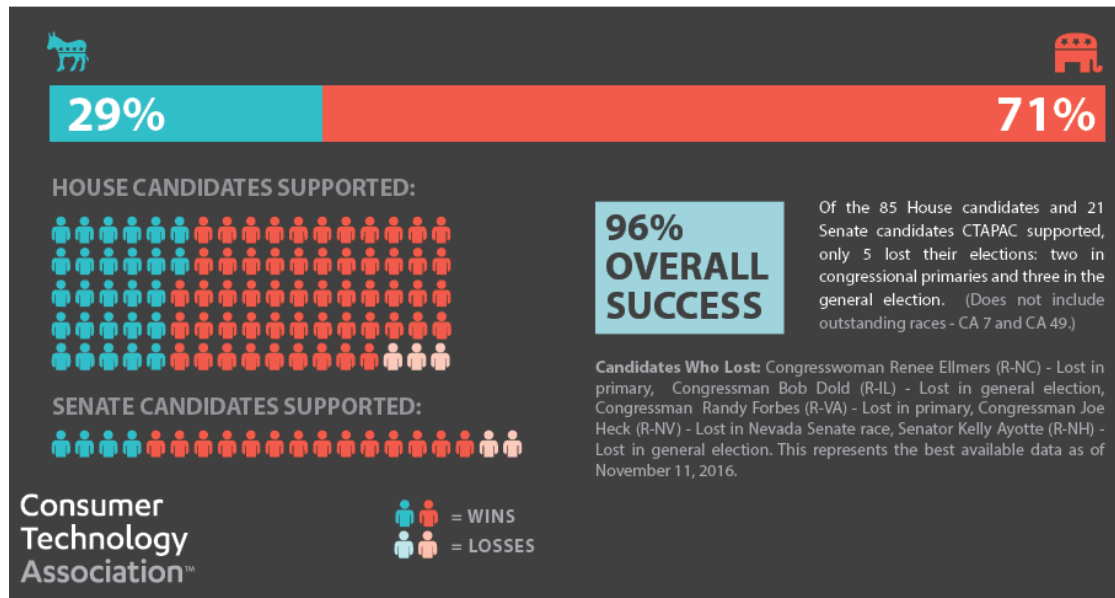
Remember REALTORS® are not only representing ourselves, we are representing

Reporting Out



CTAPAC

Total disbursements: \$577,6



DIVISION BOARDS & COUNCILS

CONGRATULATIONS to the winners of our three awards in 2016:

Small Business Council
 First board to reach 100 percent participation in 2016.

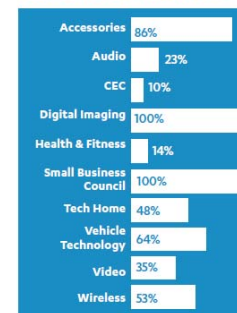
Accessories
 Board with the highest dollar amount contributed in 2016.

Digital Imaging
 First new board to reach 100 percent participation in 2016.

DIVISION BOARD & COUNCIL CONTEST

Each year, the Division Board and Council CTAPAC contest measures the money raised and participation of each division board. The support provided by this contest has been a critical factor in CTAPAC's growth over the years and continues to introduce prospective donors to the important work of the PAC.

2016 PARTICIPATION



2016 CONTRIBUTIONS



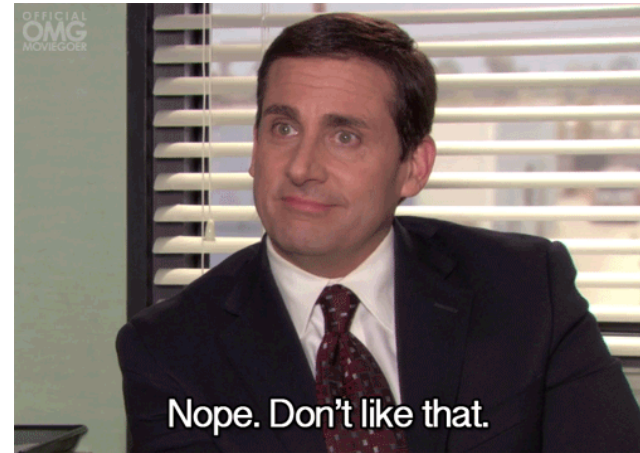
Consumer Technology Association™

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Communicating Value in a Skeptical Environment

- Have a presentation ready
- Address the misconceptions
- Create an education campaign
- Create a strong “PAC identity”
- Competitor/industry performance = motivational
- Get a senior management champion (or a few)
- Serve as business function, “partner” & “solution center”
 - We’re either maintaining, creating or defending a market



Questions?

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