

PAC Charitable Match: Structure, Strategy and Promotion PAC Conference 2019

Jane Crumpler

Director, Government Relations

Cobham Advanced Electronic Solutions

Focus: Starting a PAC Charity Match Program from scratch

- **Experience:** Molina Healthcare Employee PAC
- Director, Political Advocacy from June 2015- June 2018
- 2015 PAC Receipts: \$224K
- 2018 PAC Receipts: \$403K
- Started PAC Charity Match in Jan. 2017 for 2016 donors
- Charity Match Program grew between 2017 and 2018, despite shrinking PAC membership numbers between 2016-2017 (846 vs 496)

Year One: Start Small

- Tiered our matching program at the following levels:
 - Annual PAC contribution of **\$500-\$999**: **flat \$100** charity match
 - Annual PAC contribution of **\$1,000-\$2,499**: **.25%** charity match
 - Annual PAC contribution of **\$2,500-\$4,999**: **.50%** charity match
- These three levels had a *set list* of nationally-based charities from which to choose.
 - We surveyed this group of PAC members to get their input.
 - Goal was to offer a range of charities covering different types of philanthropy.
- Max donors had a **1:1** charity match ratio
 - Max donors could also choose *any* charity for their match.
 - No restrictions outside of being a 501c3 organization.

2016 PAC Charity Match Overview

In our first year of offering
PAC Charity Match to donors...

TOP 3

charities supported

- ✓ Boys and Girls Club
- ✓ Prevent Child Abuse America
- ✓ Feeding America

10

charities
matched

\$9,500

average donation
size of the top
three charities

160

PAC donors participated

305 employees
were eligible
to participate

\$55,946

total
amount
matched

\$5,850

average
donation
size

PAC CHARITY MATCH: WHO QUALIFIES?

Anyone giving \$500 or more annually to the PAC is automatically enrolled into the PAC Charity Match Program. Matches are tiered from a flat \$100 up to a full dollar-to-dollar match based on your giving level to the PAC.

Year Two: A few small changes

- **Kept the same tier match structure.** This worked really well for us and kept our total donation amount in check- <\$65K (Corporate was very happy!)
- Feedback from the previous year indicated employees wanted to have a **state-based charity** from which to choose, so we sought input from Health Plan Presidents on what state-based organization resonated with employees or one in which we had a relationship.
 - Increased matched charities from 10 to 17, 11 of which were state-based charity organizations
 - State-based charities were by far preferred

2017 PAC Charity Match Overview

In our second year of offering
PAC Charity Match to donors...

TOP 3 charities supported

- ✓ National Alliance to End Homelessness
- ✓ Matrix Human Services of Michigan
- ✓ Salvation Army of Wisconsin

107

PAC donors participated

203 employees were eligible
to participate in PAC Match

\$5,820

average donation
size of the top three
charities

17

charities matched
(increase of 7
from 2016)

\$60,709

total
amount
matched



PAC CHARITY MATCH: WHO QUALIFIES?

Anyone giving \$500 or more annually to the PAC is automatically enrolled into the PAC Charity Match Program. Matches are tiered from a flat \$100 up to a full dollar-to-dollar match based on your giving level to the PAC.

Lessons Learned

- Know the **culture** of your organization
 - How do employees like to give back?
- START **small**- this can be done in a variety of ways:
 - Set a topline budget of charity match dollars **OR**
 - Set a limited number of charities to choose from; this helps keep administration easy if you're doing it in house **OR**
 - Tier the ratio of giving levels instead of 1:1 across the board
 - Discuss "unmatched" dollars in advance- use or not?
- Be willing to **adapt** and **change** your program to fit your members needs/wishes from year to year.
 - This is their benefit, so listen to them!
- Be prepared to spend **a LOT of time** on the administration
 - Or else budget for outside help from a good charity match vendor- it is worth it!