

# The Components of an Integrated PAC Fundraising Campaign

### **Matt Meehan**

Director, Pfizer PAC

**U.S. Government Relations & Public Affairs** 

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US GOVERNMENT RELATIONS



Eligible class: 21,156 (5,340 Members)

Participation rate: 25.24% (12% in 2010)

Average donation: \$546

Surpassed \$2.9 Million in Receipts (2015-2016)

Solicit year-round



## **Critical Components...**

3 Key components to every campaign

### Survey says...

# The 4 Cs: Competition, creativity, customized messaging and closing...

### PITMOV



# **Competition...**





## Raise \$2.7 Million for 2015-2016 Cycle

# 2016 Goals



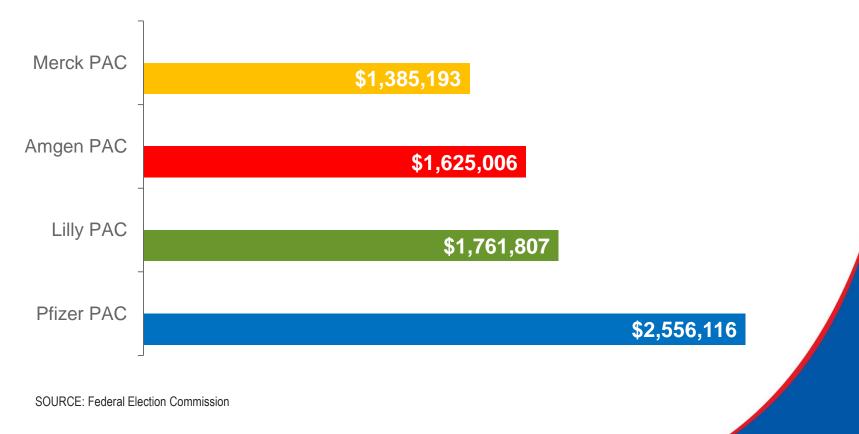
Recruit 750 New PAC Members by December 31, 2016 (+1,118 New Members & 838 bump ups)

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# **Industry PAC Comparison**

**2015–2016 Cycle Receipts** (January 2015 – October 19, 2016)





### 2016 PAC Participation Goals by Division

Corporate Affairs 74% PAC Participation 200 PAC Eligibles 149 PAC Members (+14)	AC Participation 24.45% PAC Participation 165 PAC Eligibles		
Goal+11 PAC Members80% PAC Participation	Goal +28 PAC Members 40% PAC Participation	Goal +186 PAC Members 35% PAC Participation	
Pfizer Innovative Health 55% PAC Participation 5,044 PAC Eligibles 2,772 PAC Members (+243)	PAC Participation <b>23.14%</b> PAC Participation <b>5,044</b> PAC Eligibles <b>389</b> PAC Eligibles		
Goal +53 PAC Members 56% PAC Participation	Goal +10 PAC Members 25% PAC Participation	Goal GOAL ACHIEVED 25% PAC Participation	
Legal 41.88% PAC Participation 277 PAC Eligibles 116 PAC Members (+12)	Finance & Business Dev. 23% PAC Participation 1,257 PAC Eligibles 237 PAC Members (+42)	Pfizer Global Supply 8.93% PAC Participation 3,182 PAC Eligibles 284 PAC Members (+40)	
Goal+62PAC Members65%PAC Participation	Goal +77 PAC Members 25% PAC Participation	Goal +135 PAC Members 13% PAC Participation	
Human Resources 24.46% PAC Participation 323 PAC Eligibles 79 PAC Members (+8)	Business Technology 26.2% PAC Participation 1,439 PAC Eligibles 377 PAC Members (+53)	Worldwide Research & Dev. 8.80% PAC Participation 4,898 PAC Eligibles 431 PAC Members (+44)	



# **Top Campaigns of 2016... 1,118 New PAC Members / 838 Member 'Bump Ups'** *Achieved 25.59% participation prior to HSP integration*

Pfizer PIH	PIH PAC Challenge Drive to 75!	<b>306 New PAC Members</b> 457 Increased Contributions
Pfizer Global Women's Council	One Bold Move Campaign	<b>257 New PAC Members</b> 113 Increased Contributions
Pfizer PEH	NA Year Beginning Meeting & John Young Drive to 35	<b>175 New PAC Members</b> 40 Increased Contributions
Finance & Business Development	Frank D'Amelio Video	<b>73 New PAC Members</b> 1 Increased Contribution (C. Circle)
Pfizer VOC	Dinner with Albert Day on the Job with Leaders	<b>42 New PAC Members</b> 61 Increased Contributions
Pfizer GIP GEP VOC	Puerto Rico Pride to 75!	<b>32 New Members</b> 2 Increased Contributions
Pfizer Legal	'Ante Up' & Drive to 65!	<b>22 New Members</b> 33 Increased Contributions
Pfizer Oncology	POAs I & II	<b>22 New PAC Members</b> 54 Increased Contribs. (2 C. Circle)
Chairman's Circle / President's Cabinet	Luncheon	<b>20 New PAC Members</b> 1 New President's Cabinet / 19 New Chairman's Circle
Pfizer PGS	Drive to add 5%!	<b>19 New PAC Members</b> 6 Increased Contributions

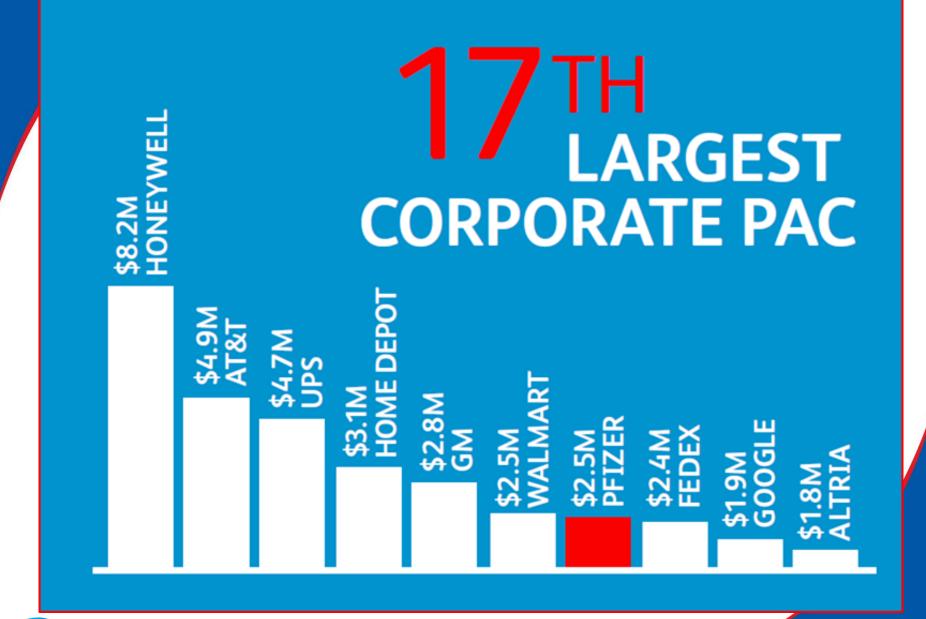


**S** tate of the PAC: Division Participation

Division	Jan 18, 17
PIH IM	65%
PIH Vaccines	60%
PIH Oncology	56%
РЕН	21%

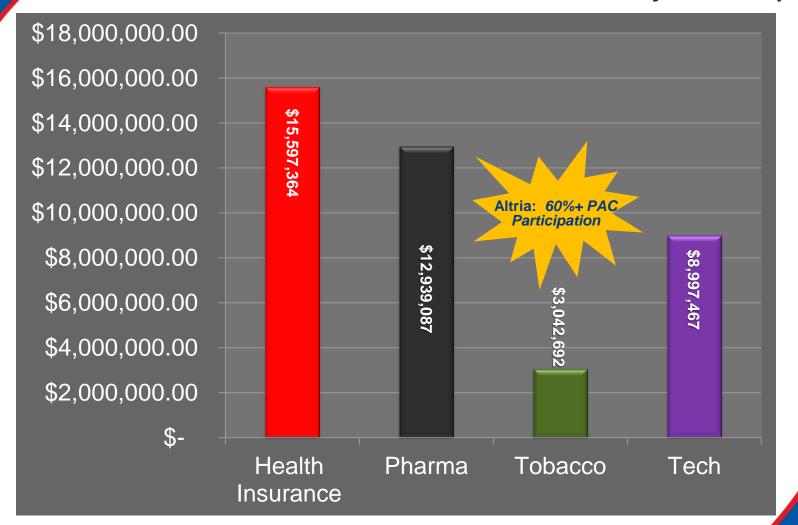


\*PAC Participation as of 1/18/2017



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### Political Spending by Industry 2015-2016 Cycle PAC Spend



\*Data from Open Secrets through September 2016



# North Region PAC Participation By State

1	State	Eligible	Member	Percent	27	MD	142	70	49.30%
2	AK	2	2 2		28	TX	433	206	47.58%
3	MT	10	3 (	80.00%	29	AR	60	28	48.67%
4	SC	82			30	CO	109	49	44 5%
5	HI	g			31	MN	65		
6	WA	88	65		32	NM MS	17	31	
7	ID	15			34	VA	386		484 of 900 new PAC
8	KY	85			35	WY	5		members nationwide
9	OR	40			36	DE	26		are from
10	WV	31	20		37	ME	29		the North region
	ND	11			38	TN	394	123	
	AL	87	7 55 55		39	WI	178	50	
	IA	38	3 24		40	NC	718	190	26 /6
	OK	53			41	KS	149	38	25. 27.
		68	39		42	PA	2,040	510	25.00%
	GA	178	99		43	NY	2,445	606	24.79%
	AZ	97			44	Total	21,031	5,099	24.25%
	NE	33			45	CA	1,337	302	22.59%
	OH	246			46	MO	737	156	21.17%
	DC	17			47	NJ	2,579	514	19.93%
	NV	34			48	MI	1,013	181	17.87%
	FL	322			49	IL or	897	157	17.50%
23		21			50 51	СТ	2,579	393	15.24%
	IN	127			52	BI	209	24	11.48%
	UT	37			53	NH PR	282 738	28 66	9.93% 8.94%
	SD	6			54	MA	1,635	140	8.56%
			-		55		1,000	140	0.307

\*PAC Participation as of 9/27/16



### 2016 Federal / Governor PAC Engagement Win/Loss Ratios...

		# of PAC-supported candidates	Won	% of candidates supported who won	Lost	Retired
*Senate						
	Democrats	9	6	67%	1	2
	Republicans	23	19	82%	3	1
	Independents	0	0		0	0
	Total Federal Senate	32				
*House						
	Democrats	96	88	91.60%	6	2
	Republicans	109	97	89%	8	4
	Independents (PR)	1	1	100%	0	0
	Total Federal House	206				
**Governor						
	Democrats	8	5	62.50%	1	1
	Republicans	9	4	44.40%	2	2
	Independents (PR)	1	1	100%	0	0
	Total GV	18				
TOTAL		256	221		21	12
% of Total		100%	86.33%	86.30%	8.20%	4.69%



67 New Pledges! 33 New Members ✓ 34 Members Increased

Contributions

### **GIP Cluster 2 Northeast District PAC Leaders**

4-Way Tie: Rochester, Detroit, Grand Rapids, Manchester & (100%)

Highest PAC % Participation Growth: Long Island (+56%)

Buth Districts above will be recognized at a team dinner at a restaurant of their choice and a \$50 debit card!

- <u>Rochester</u>: 100% (+8%) Wins Tiebreaker with +\$above Grand Rapids (\$3,720 in total team \$; +\$1,082 above Detroit)
- Detroit: 100% (+28%)
- Grand Rapids: 100% (+40%)
- Manchester: 100% (+11%)
- Newark: 92% (+39%)
- Poughkeepsie: 91% (+28%)
- Hartford: 90% (+40%)
- Manhattan: 89% (+45%)
- Boston: 82% (+28%)
- Long Island: 78% (+56%)

The PAC % rates above are as of 6/16/16. There will be a winning District in <u>both</u> overall PAC participation and overall growth from baseline in PAC participation. Ties will be broken based on the overall value of a Districts' collective PAC contributions.

Important: DBMs cannot ask (solicit) direct reports to contribute to the PAC. DBMs may only educate colleagues on the role and purpose of the PAC. This is because decisions to give to the PAC must be completely voluntary and colleagues must not feel coerced or forced into contributing to the PAC.



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# **State of the PAC:** GIP SAM Regional PAC Participation

### Update as of 6/16/16: THE GO-TO PAC REGION -- #1 in GIP!

Baseline as of 5/31/16	
------------------------	--

GIP Region	PAC Participation %
Gil Floyd Cluster 1 Fl/GA	92.73%
Eliza Cha Cluster 1 Pacific Northwest	88.00%
LaSonja Chapple - IS NE/Central	85.58%
Gregg Northcutt - Cluster 1 Atlantic Coast	77.12%
Ally Jones - Cluster 1 West	76.00%
Annette Montandon IS South	72.22%
Jim Besse IS West	70.59%
Lori Greene Cluster 1 Great Plains	69.90%
Scott Shelton Cluster 2 Midwest	67.54%
Bob Williams Cluster 1 OH-MI	66.67%
Tom Degennaro - Cluster 2 West	65.81%
Floyd Whitten Cluster 1 Gulf Coast	63.06%
Hank Allen Cluster 2 Northeast	63.00%
Jeff Harshfield Cluster 2 South	59.50%
Todd Liddell - Cluster 1 TX/NM	55.68%
Chris Peterson Cluster 1 TN-KY-IN	54.55%
Ken Smith Cluster 2 Southeast	53.39%
Ed Kowalewski, Inflammation, East Region	46.91%
Todd Willis Cluster 3	45.37%
Rich Lombardo Cluster 2 Mid-Atlantic	44.00%
Nelson Morales Mejias Puerto Rico GIP	42.00%
Todd Foster, RM, GIP Rare Diseases	41.51%
Fran Barnette Cluster 1 Mid Atlantic	41.30%
Tim Duffy Cluster 1 Northeast	36.84%
Dave Norris, NSD, Neuroscience, GIP Rare Diseases	34.52%
Chris Thompson, Inflammation, West Region	29.41%

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\*PAC Participation as of 6/16/2016

# Creativity...



# Bump Up Strategy...

### ~40 total bump ups to \$1000/annually

+\$40,000 in Pfizer PAC revenue over 12 months...





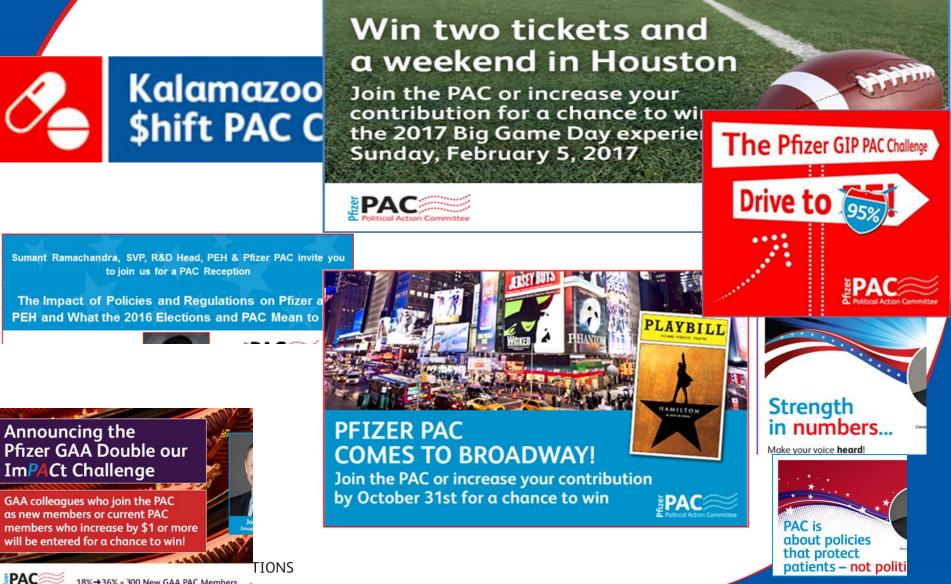
Dinner with Ian in NYC

**86 New PAC Members** 43 Increased Contributions

33 New Capital Club Members (\$1,000/year)
11 New Leadership Council Members (\$500/year)



### **Creative PAC Campaigns**



18%→36% = 300 New GAA PAC Members

## Global Women's Council One Bold Move PAC Drawing



Click Here to Enter

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# **Customized Messaging...**



From: Scarduffa, Marc Sent: Monday, December 5, 2016 4:23 PM To: Meehan, Matthew B Subject: FW: US Government Relations Update

#### [#FirstName#],

The question 1 get asked most about our Pfizer Political Action Committee is, "What value does it bring to me?" To best answer this question, I hope you will ake a few minutes to read our most recent Government Relations update. As you digest the information I think you will discover that the value of the PAC comes from the opportunities it provides our state and federal Government Relations colleagues to educate lawmakers at all levels of government about the work that Pfizer does generally and, more specifically, the work that each and federal Government Relations update. As you digest the information I think sea and every one of us does each day to discover new medicines and ensure access to those medicines for patients. With your support of the PAC, we are able to responsibly align Pfizer's voice with the policymakers and elected officials who value the work you do here at Pfizer. Whether you're motivated by serving patients by discovering, developing or distributing new treatments or another personal motivation – the PAC impacts all of us because the policies impact all of us. You have a choice to make and I hope you'll choose to support Pfizer.



# U.S. GOVERNMENT RELATIONS LIDDATE

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#### Virginia – Surviving and Thriving with Metastatic Breast Cancer

#### Silbermann Leads on Vaccine Policy in D.C.



Pfizer Vaccines President and General Manager Susan Silbermann held multiple post-election meetings with key leaders and staff on Capitol Hill as well as with the National Vaccine Program Office within the U.S. Health and Human Services Department, Silbermann also participated in a panel discussion with Shot@Life to help increase awareness of pneumococcal vaccines. Rounding out a busy visit to the nation's capital, adult vaccination was the topic of discussion at a Women's Leadership Roundtable where Silbermann led a discussion highlighting the critical role women play in making sure their family members are inoculated against disease.

Pfizer

To read more about the event, click here

An event bringing together metastatic breast cancer experts, law makers and advocates to discuss the latest in treatment and research was held on November 3 in Richmond The collaborative event between Pfizer and CACV, the Cancer Action Coalition of Virginia, also highlighted the importance of screening and the need for additional funding for research, the importance of diversity in clinical trials, the disparity in outcomes as well as the social aspects of living with MBC. Virginia Delegate Dolores McQuinn presented a resolution by the General Assembly proclaiming every November as "Metastatic Breast Cancer Awareness Month" in the Commonwealth.

#### Illinois – Chicago Approves Sales Representative Licensure

The Chicago City Council approved Mayor Rahm Emanuel's proposal to require all pharmaceutical sales representatives working in the city to be licensed and adhere to multiple new reporting requirements, as part of the mayor's opioid abuse deterrence strategy. Pfizer's Government Relations Director testified before Chicago's Committee on Budget and Government Operations about Pfizer's partnership with the city on opioid abuse. We were successful in postponing the effective date of the ordinance and are pursuing a strategy to modify the new requirements.

#### Tax Reform Gains Momentum

In the wake of the election, President-elect



Several other events were held around the country to raise awareness about MBC. Also, the unique online 'It's About Time' campaign, sponsored by Gilda's Club, hosted a 13-hour Facebook event recognizing Metastatic Breast Cancer Awareness Day, featuring a different advocacy partner or patient tackling a different topic every hour. Each event began at 13 minutes past the hour, recognizing that someone dies from Metastatic Breast Cancer every 13 minutes.



## Pfizer's Get Out the Vote & USGR Initiatives



#### FLORIDA VOTER REGISTRATION DEADLINE EXTENDED TO OCT. 18<sup>™</sup>



Voter Registration Deadline: October 18, 2016

Early Voting: October 29, 2016 – November 5, 2016

Vote-by-mail Information: <u>Click here</u> for detailed information/ deadlines

General Election: November 8, 2016

#### Your vote can make a difference!

#### www.PfizerElectionCenter.com

A one stop resource for recent news, information on elected officials/candidates and voting registration, including polling locations, deadlines, and absentee voting.

Participation in any Pfizer Grassroots mobilization is completely voluntary and is not a requirement of your employment at Pfizer.

51,775	35,107	70.43%
GOTV communications sent to colleagues	GOTV communications opened by colleagues	Open rate for GOTV communications





# Closing...



# **Common Objections and Myths**

- "I don't agree with "X" legislator and the PAC gave to him/her..."
- "I am not political..."
- "I don't agree with lobbying (don't like, don't believe in, etc...) our political system and don't think this money should have to come from me...."
- "The PAC and politics don't really impact me and my job..."
- "The PAC only gives to the \_\_\_\_\_ party..."
- "I don't know where my money goes..."

### Key steps to work through colleague objections: Listen, Empathize, Clarify, Verify and Close...



### Fundraising Guidelines: The Do's and Don'ts of Recruitment

### What you should do...

- Listen...be empathetic -- put yourself in their shoes and consider the policy issues that they may relate to
- Find ways to engage colleagues (1:1; formal meetings, conference calls, CRGs, POAs, etc.)
- Ask if they are a member...trust their response
- Show a visual when you can
- Ask the colleague if they would be willing to contribute...most have never been asked
- Do coordinate with other Ambassadors
- Ask the PAC Team if you are unsure...
- Refer state specific questions to state GRD/ADM and Matt Meehan
- Send 'Thank You' notes
- Send inquiries to Matt Meehan:
  - <u>matthew.b.meehan@pfizer.com</u>



### What you should <u>not</u> do...

- Do not get into a political debate or battle
- Do not call / email colleagues who don't appear on your list
- Do not tell the colleague that you know that they are a non-member
- Do not tell the colleague about the PAC Ambassador incentive

### What you <u>MUST</u> do...

• Use PAC disclaimers anytime you are asking colleagues to consider contributing

# PITMOV...



# **Preparation is the Mother of all Victory!**

- Video (intro), snail mail and written testimonials from leaders
- <u>Ambassadors</u> (PAC profiles; peer and leader testimonials; SALES Training & Objection Handling...)
- <u>Pre-Post Meeting/Event/Campaign Communication</u> (subject lines <6 words)</li>
- Live panel / conf. call(s) policy focus ("Policy" Action Committee)
- Drawings with customized policy messaging that is business unit specific
- <u>Closing</u>: Multiple "asks" from leaders, Ambassadors and peers
- Website highlighting winners, colleague faces, event recap, etc.



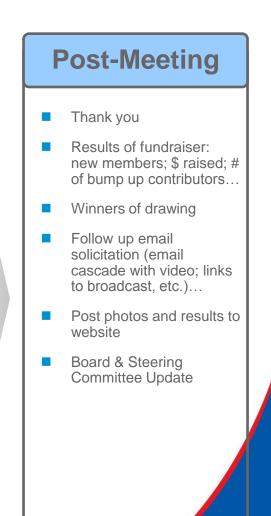
## Successful Campaigns: Preparation and Execution

### Pre-Meeting/Campaign

- Eligible audience targeted & baseline PAC participation
- PAC ribbons? PAC-members only?
- Leader host pre-meeting email message (% PAC participation goal, raffle, reception, call-to-action)
- Reception invitation via Outlook

### Meeting

- Ambassadors (in person and profiles...) – including 'Why I support the PAC...' from the leader host...
- PAC booth
- Drawing/raffle presence
- Host live event/reception with speakers
- Video to kick-off @ live event
- Testimonial from the stage
- Q&A with leadership
- Marketing/collateral





## **Example 1: PAC Events -- Preparation** for the Communication Cascade

### Pre-Campaign/Launch

#### fizer Oncology Colleagues

We are just one week away and I wanted to inform you that our U.S. Government Relations/Pfizer PAC tea with 143 active PAC members. Thank you! The PAC team will run a new campaign to grow participation even the aisle" dialog of shaping oncology Democrats and The Pfizer Oncology PAC Challenge To engage our t AC will again hold a contribution by or higher (members reflects the high Drive to 65! Pfizer Oncology **PAC** 

> Maya Martinez-Davis and Pfizer PAC invite you to join us for a PAC Reception Pfizer State & Federal Government Relations:

Our Work on Policies that Impact the Current Oncology Landscape and Insights into the 2016 Elections

### Campaign



Gruber, Joseph Meehan, Matthew B

Subject: Following up.

#### [#FirstName#],

From

To: Cc:

> I hope you had an opportunity to see Frank's message about the critical importance of supporting the PA contribution (click here to join). As a longtime member of the PAC Board and Pfizer PAC Treasurer, I hav we support. For instance, I learned that 65% of colleagues' contributions go to federal policymakers and PAC will never support a policymaker for his or her position on a social, religious or political issue. That th elected official is solely dependent on their position on issues that impact patient access to medicines, y issues that impact our ability to operate, like protecting our patents and intellectual property and creatin

> I am proud to sit on Pfizer's PAC Board because I believe in our system of ethical and responsible suppor believe in those same ideals, then please consider a small contribution to the PAC.

> Remember: The amount is not important - \$1 or \$2 a pay period is just fine. What is important is that mo our support for those who support us. Click here to join.

> > POLITICS IMPACTS EACH OF US

Thanks for your consideration!



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Oncology Colleagues,			
Thank you for your supp	ort and engagement v	vith the Pfizeplitical Act	ion Co
made to the PAC over th		pin us in c ulating the	
		particip Pincology N	
contributions is t	f vour co	SUDD SUDD	
tremendous suppor			
PAC DISCLAIMED	+132 PAC	Pledges:	
Contribut			
contribute mon	97 New PA	C Members	
citizen or carry a gr	35 Increas	ed Pledges	
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		DAC Performe	re
850 New PA		PAC Performel	
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**Post-Meeting** 

## **Example 2...Pfizer Grassroots Event** and/or USGR Newsletter

**Post-Meeting** 

### **Meeting/Fly-In/Event**





-			
	To:	Meehan, Matthew B	
	Cc: Subject:	Following up	
	Californi	a Colleagues,	
		ou for joining us at the recent town hall. I wanted to follow up w ollow this link and I thank you for your support: <u>Pfizer PAC</u>	
	defendii is the leg	AC participation in California GIP-SAM stands at 44%, the rest of ng patient access to our innovative medicines. Quite frankly, lob glator who understands the value of medicines versus price co e the people we support with the PAC. When it comes time to r	
	It is also	paramount that we continue to grow the PAC so that we can gr	
	•	Yes, please sign me up for the PAC for <u>\$15 a year</u> can do a bit more, so please put me down for <u>\$5 per pay perior</u> would like to join one of the PAC Clubs at the following <u>PAC Le</u> o <u>Leadership Council (\$20.84 per pay period)</u> o <u>Capital Club</u> (\$41.67 per pay period) o <u>Chairman's Circle</u> (\$104.17 per pay period)	4
	effort. P	nt:Please also be on the lookout for an intext week from Pl lease note that participation in this or any inter Grassroo or your consideration and have a great weekend	
	Dennis		
		+52	New PAC Members <
Please conside	r supporti	ing the Pfizer PAC	
Connell, Keith			$1 \land I \land V$
You forwarded this	message on	12/5/2014 7:47 AM.	
Sent: Wed 12/3/2014 To: Meehan, Matt			
Pfizer			Keith Connell Regional Business Director Southeast Region
			Global Innovative Pharma Business
South Carolina Co	olleagues,		

Thank you for joining the South Carolina Grassroots Tele-Town Hall to learn more about how Government Relations colleagues like

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# **Example 3...PAC Event**

