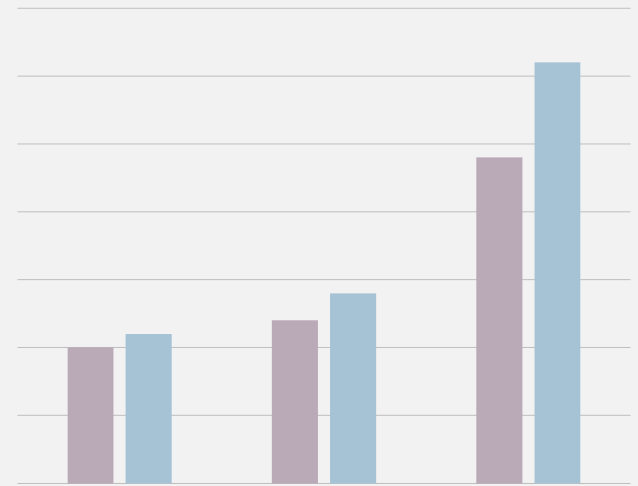


2016 PAC Match Survey



Survey Overview and Methodology

The Public Affairs Council conducts this survey annually to identify common trends and practices of PACs conducting charitable match programs. Survey questionnaires were completed only by PAC administrators who operate a PAC match program. Surveys were distributed at the 2016 National PAC Conference in March 2016, as well as via social media channels to the Council's PAC community. In all, 39 organizations participated in the survey. This report provides a statistical summary of answers to survey questions.

The mean is an arithmetical average calculated by adding the figures in a set, then dividing the sum by the number of items in the set. For some questions, the data is presented in percentiles. Ordering the data from smallest to largest, those numbers falling below 25 percent of all the data analyzed are allocated in the 25th percentile, and so on for each quartile of data. The number reported in each percentile is the upper limit of that data set. The number noted for the 50th percentile is also the median.

The Case for PAC Match

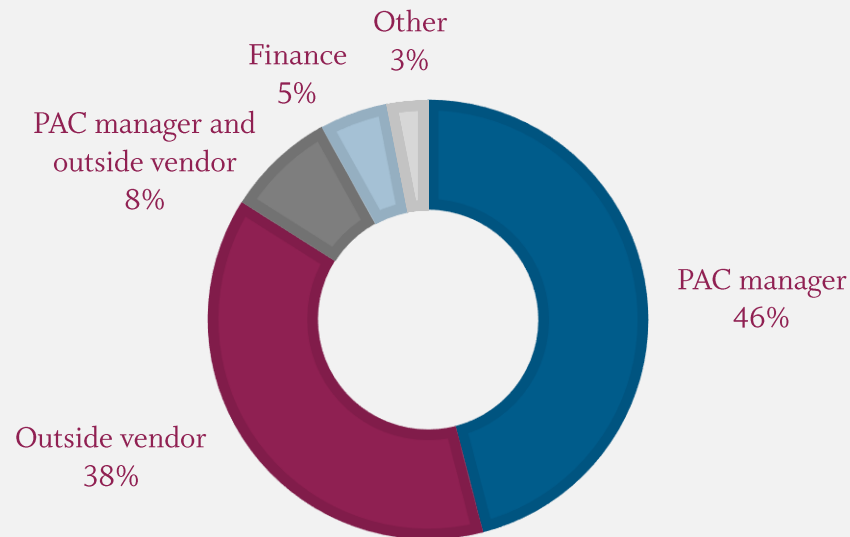
PAC charitable match allows a PAC's connected organization to match all or a portion of an individual's PAC contribution to a charitable entity. Organizations have the discretion to make a 1:1 match for all contributions, match only certain contributions or require a giving threshold before the match kicks in. As this survey's results show, different PACs choose different structures that meet their internal culture, resources and needs. Regardless of the structure, neither the organization nor the individual receive a tax deduction for the charitable contribution.

The Public Affairs Council's *2015 Corporate PAC Benchmarking Report* found that PAC match was the single most effective PAC benefit offered by PACs to incentivize PAC contributions. Now, in this survey, 94 percent of respondents indicate that PAC match is an effective tool for raising PAC funds. The remaining 6 percent responded that their match structure is not optimized for full effectiveness.

This report examines the administration, restrictions and disbursement procedures of PAC match programs. The report also shares the limitations and requirements for donors and charities to be eligible for this program. The Public Affairs Council has many resources and information on PAC match. If you have questions or want additional resources, contact the Council at 202.787.5950.

Part I. Administration

Who administers your PAC match program?



Of the responses for outside vendors, the following firms were identified:

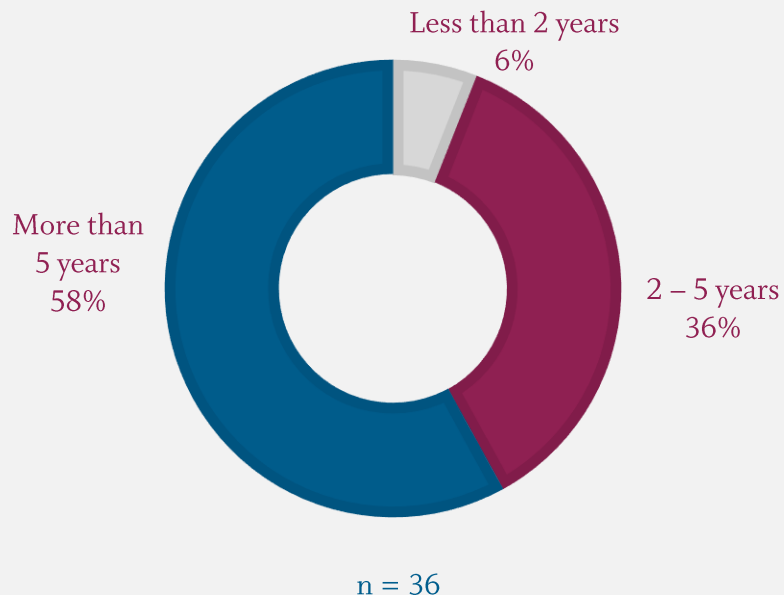
- Public Affairs Support Services (7 respondents)
- Your Cause (2 respondents)
- Cybergrants (2 respondents)
- Aristotle (1 respondent)
- JK Group (1 respondent)

Five respondents did not indicate which vendor they use.

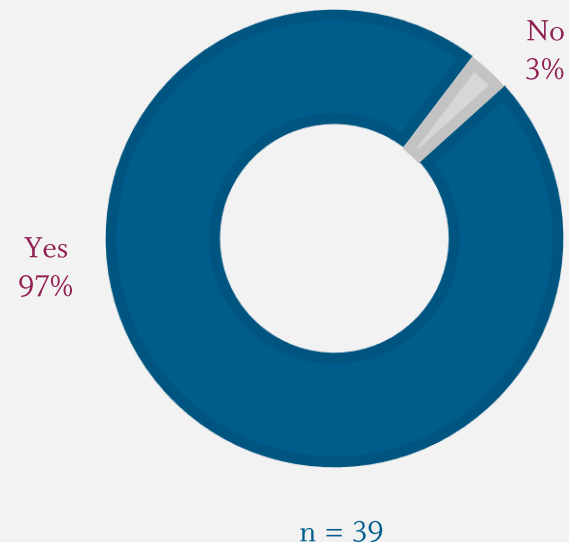
n = 39

Part I. Administration

How long has your PAC match program been in place?



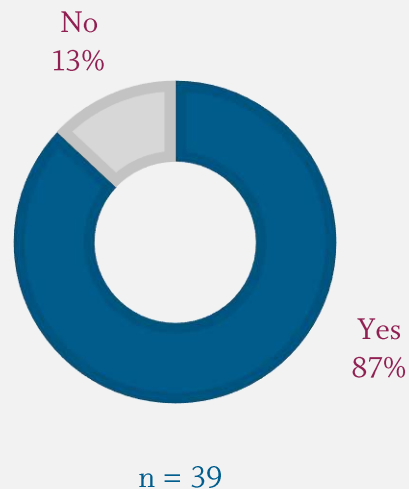
Is your PAC match program administered separately from your organization's other charitable giving programs?



Part II. Eligibility

Is your PAC match program offered to all eligibles?

(In some cases, even if eligible, they may be required to reach a giving threshold to be eligible.)



77% of PAC match programs place restrictions on the amount required or level obtained to be eligible for charitable match.

Of these restrictions, **77%** are based on annual contribution amounts, while **23%** are based on the amount given per pay period.

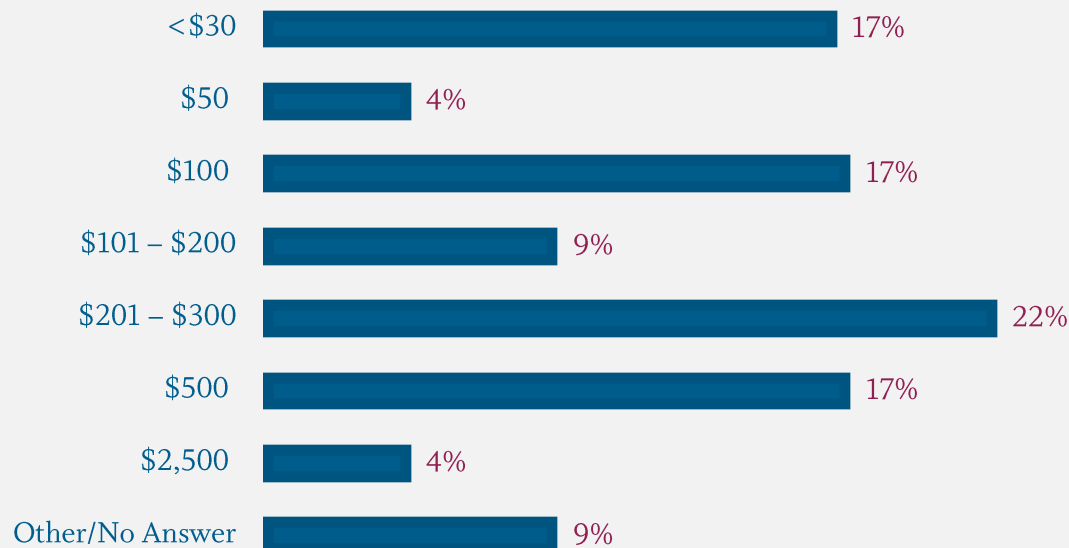
23% of PAC match programs match every contribution to the PAC, regardless of the amount or manner in which it was given.

n = 39

Part II. Eligibility

Of the **77%** of PAC match programs that place restrictions on which contributions are eligible for the charitable match, **three-quarters** required a minimum annual contribution. The responses for contribution minimum amounts included:

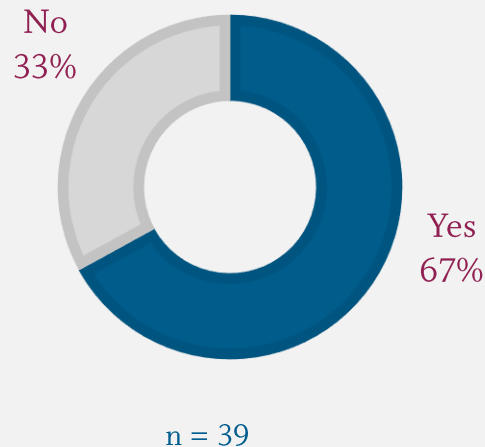
Annual Contribution Minimum



n = 23

Part III. Amount of Match

Is every contribution eligible for PAC match matched on a 1:1 basis?

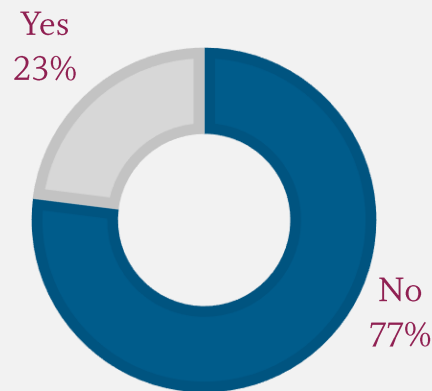


Of those that aren't eligible, the following match amounts were shared:

- \$0.40: \$1 match
- \$0.50: \$1 match (6 responses)
- \$50 maximum match
- \$100 maximum match
- \$2: \$1 match
- Tiered match based on contribution level (3 responses)

Part III. Amount of Match

Is there a maximum amount per donor, per year, that your organization will match?



n = 39

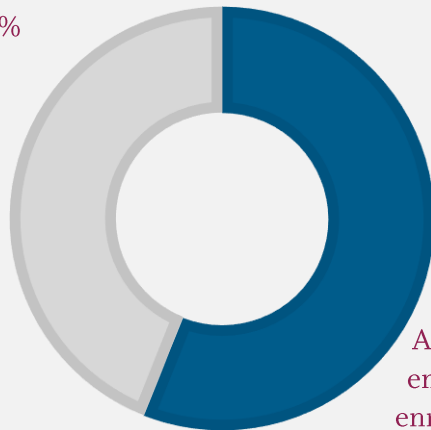
Of those that have a maximum match amount below the legal contribution limit, responses included:

- \$50
- \$250 for general donors or \$500 for incentive club members
- \$500
- \$1,000 (3 responses)
- \$2,500
- \$2,500 for general donors or \$5,000 for incentive club donors
- \$3,000

Part IV. Charity Eligibility and Selection

When are contributors asked to name their charity?

Prior to the distribution of
charitable contributions
44%



n = 39

Only **24%** of respondents **preselect or limit** the number of charities donors may choose from. **76%** do not limit the charity options. Of these organizations, the number of charity options range from 1 to 20 charities.

n = 38

76% of respondents allow donors to specify **United Way** as a recipient of PAC match funds.

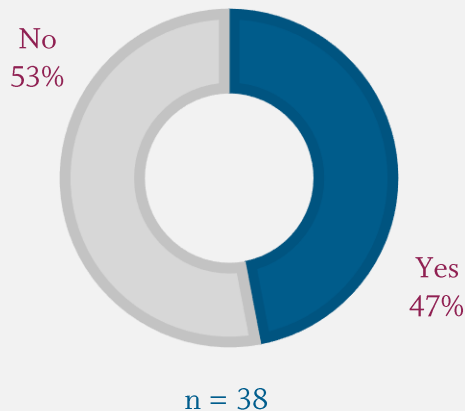
n = 37

63% of respondents also allow donors to select **multiple charities** to receive matching funds in one calendar year.

n = 38

Part IV. Charity Eligibility and Selection

Other than it must be a 501(c)(3), does your PAC have restrictions on the types of charities eligible to receive PAC match funds?



Only **one** respondent indicated that they allow additional organizations to receive the match:

Donor may designate up to \$600 for an EIN-number-only charity, such as a church food bank. However, they cannot give to the church itself. The organization must provide services available to the community.

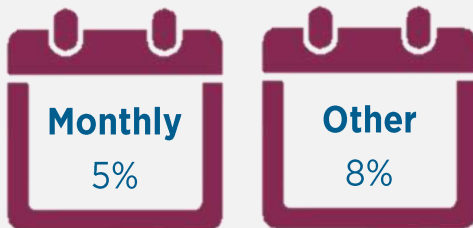
Part IV. Charity Eligibility and Selection

Of the **47%** of PAC match programs that place restrictions on the types of charities eligible to receive PAC match funds, the following restrictions were shared:

- No religious, affiliated groups, no sororities or fraternities. Must follow corporate charitable rules.
- No religious organization and must be tied to community service.
- No organizations that are primarily religious, discriminate or violate national equal opportunity policies. No political organizations, booster clubs, alumni associations or organizations not in alignment with the company's values. PAC board makes final determination.
- Charities are preselected by community relations department.
- Employees can choose one of three national partners.
- No churches or schools.
- No (strictly) religious organizations (3 responses).
- No individuals endowments; religious groups for religious purposes; national ceremonies, memorials, conferences, testimonials or other similar events; sponsorships for marketing benefit; employee recruitment efforts.
- Cannot give to organizations that discriminate against a person or group on the basis of race, religion, color, national origin, age, sex, gender identity, disability, status as a disabled veteran, political preference, sexual orientation, membership or non-membership in any lawful organization, or other basis prohibited by local laws or regulations. Also prohibited: Any religious service organizations or religiously affiliated school that is not open/available to the community at large; political, veterans, fraternal or service organizations; alumni dues or athletic associations; honor societies; professional associations; dues, subscriptions, fees, loan repayments, bequests, insurance premiums, tuition or tickets; or a contribution that provides a benefit to the employee making the contribution.
- The charities are preselected and are in the areas of environment, health and wellness, and community.
- No school, kindergarten or college.

Part V. Disbursement of Funds

When are PAC match contributions distributed to charities?



n = 39

95% of PACs **notify charities** of the name or the name and address of each PAC member that designated that charity to receive the matching funds. Of this number, **55%** provide the charity with the donor's name only.

n = 38

Of the total dollars raised for the PAC, a **median of 75%** is matched annually.

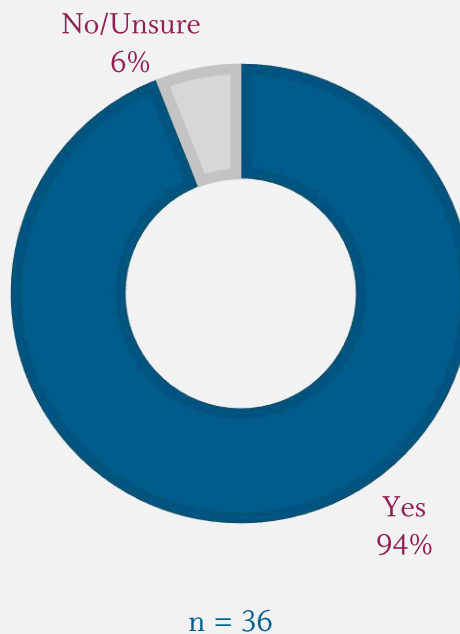
The average responding PAC matches **64%** of all PAC funds raised.

Mean	64%
25 th Percentile	40%
Median	75%
75 th Percentile	88%

n = 33

Part VI. Effectiveness

Do you think PAC match is an effective tool for raising money for the PAC?



The respondents who answered “no” indicated that the amount of their match was not of particular benefit.

Part VI. Effectiveness

Supporting comments for those respondents who answered “Yes” to the previous question include:

- Increased millennial participation by 13%.
- We use it as a major donor benefit. It helps raise higher amounts from VPs who might otherwise give less. It would help at lower dollars also but people are needy and the program already requires a lot of time administering it.
- It resonates with high-dollar senior leadership donors.
- Many employees use the PAC match to fulfill their United Way annual pledge.
- When first implemented, many team members increased contribution to recommended level. It can also be the deciding factor in giving.
- Employees love the program. We sent an email to members below minimum required amount and non-members prior to check processing. Lots of new members joined with that email.
- We have continued to successfully grow this program year after year with our PAC eligibles.
- It helped increase contribution levels to the minimum needed. It is seen as an incentive to give.
- As a messaging point for solicitations, contributions do double-duty – helping the PAC and the member’s favorite cause.
- It is absolutely one of the reasons why we raise as much money as we do. We promote this program throughout the year as a key benefit for membership in the PAC program.
- It’s effective because we do not have another avenue for charitable contributions.
- Fifty-two percent of our PAC members give at the \$500+ level in order to be eligible for the match.
- PAC match enables me an opportunity to solicit donors during other philanthropic drives, which helps to recruit donors who may otherwise be agnostic toward politics.
- Many people only give if they can have a charitable match for a cause such as their church or school.
- Participation doubled when we implemented 1:1 match, and it doubled again when we increased the match further.
- Because we administer the PAC match in-house, we have several opportunities to interact with our members, which helps our engagement and fundraising efforts. The members also seem to really like the benefit.
- It certainly encourages new donors by giving them another benefit of contributing to the PAC. It also rewards some of our longtime donors and encourages them to continue to give.
- Our number of \$5,000 contributors increased dramatically once we offered PAC match and has increased every year for the three years that we’ve had the program. Our PAC members love the PAC match feature of being a PAC member.
- More people give at goal so they can get the match.

**Thank you to the PAC administrators
who participated in this survey.**

Have questions?

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