

Measuring and Communicating the Value of PACs

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What We'll Cover



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Today's Agenda

- Demonstrating both *quantity and quality*
- Measurement tools important to internal stakeholders
- Benchmarking your program to gain support
- Connecting your PAC's activities to organizational priorities

The Hurdles

- Lack of institutional or cultural buy-in
- Fear of putting “too much out there”
- Unable to control external factors
- Changing opinions of government, PACs, etc.
- People “too busy” to care



What's the Point?

- Greater understanding of the PAC and PAC activities
- Leadership and stakeholder buy-in
- Knowing what the data is telling you
- Insight into where to put your time and resources
- Packaging your story for more involvement in the PAC
- **TRANSPARENCY:** Gaining donor trust...and contributions

Getting Started: Know Where You Stand (or Sit)

Who's your audience? Who do you need to report back to?



Getting Started: Know Where You Stand (or Sit)

Who's your audience? Who do you need to report back to?

- Leadership
- Board
- Donors
- Government Affairs colleagues
- PAC Board



Getting Feedback

What are your organization's priorities?

- How does the PAC help?

Define your value proposition: How do others see the PAC?

- What information helps your stakeholders?
- How often do they need it?
- How do they want it?



Definitions of Success

What does success look like?

- Candidates supported?
- Dollars raised?
- Eligibles engaged?
- Events hosted?
- Events attended?



WHAT are you trying to accomplish?

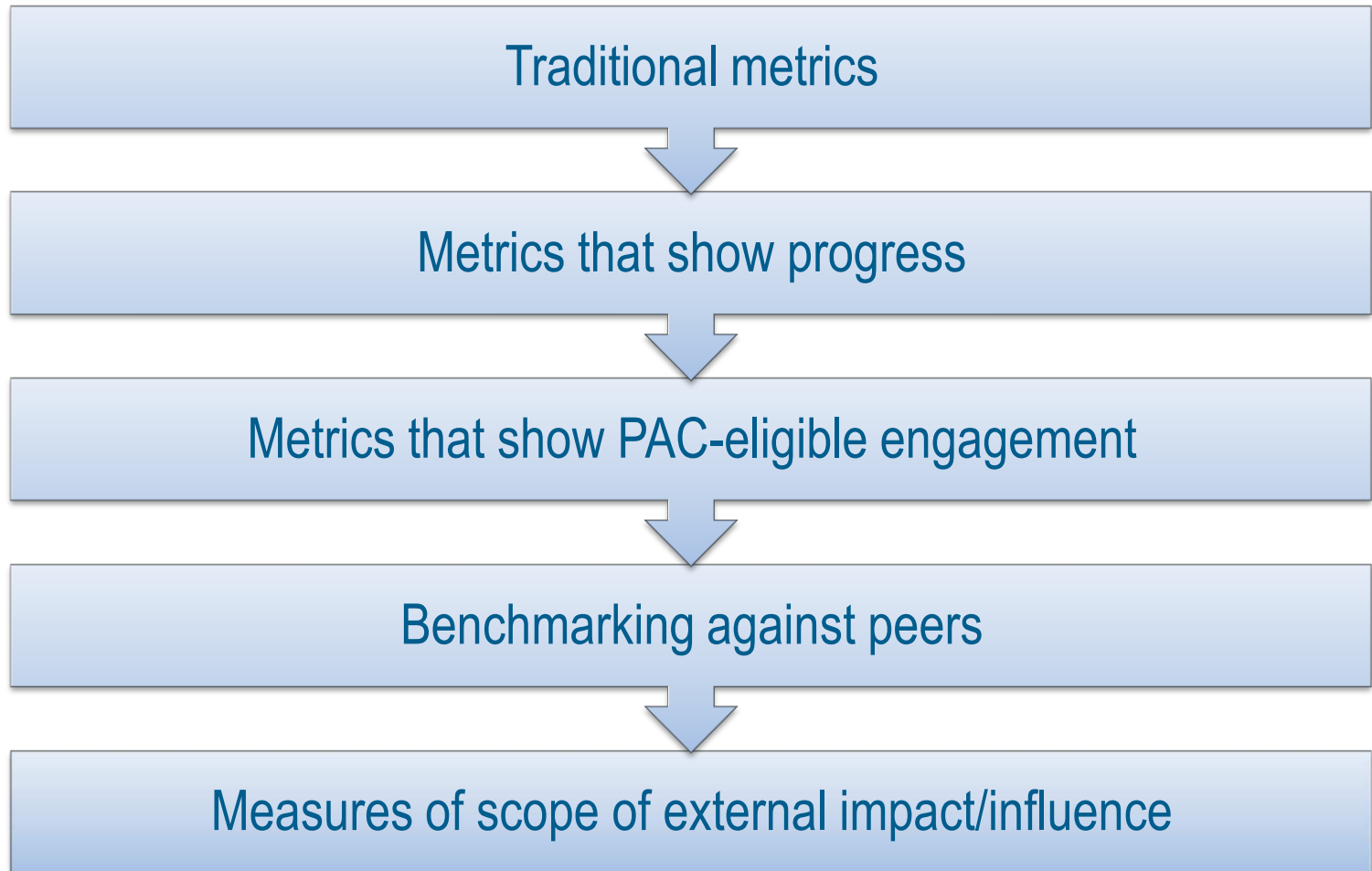
Mission Statement?

Example:

We, the members of our PAC, in order to encourage involvement in the political process and to help the organization achieve its strategic goals:

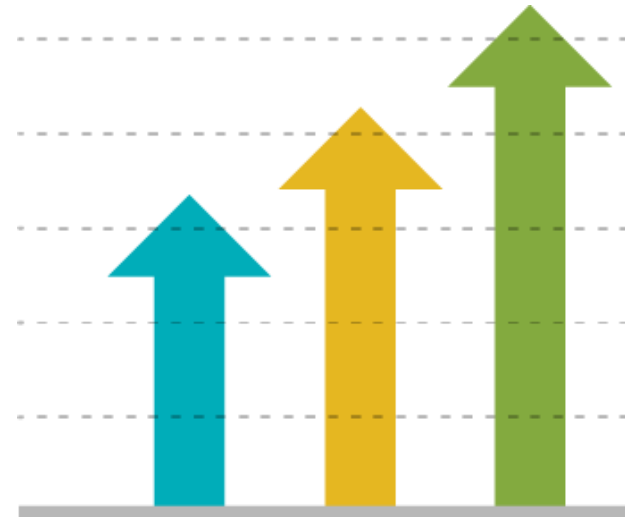
- Support the election of the best candidates, irrespective of party,
- Embrace the value of civic and ethical responsibility,
- Encourage voting as the fundamental right of citizenship, and
- Educate ourselves on public policy issues that affect the association, our industry and our community.

What Metrics Should You Use?



Traditional Metrics

- Total dollars raised (by segment)
- Participation rates (by segment)
- Number of new PAC members (by segment)
- Donor retention rate
- Disbursement success rate
- Bipartisanship



Metrics That Show Progress

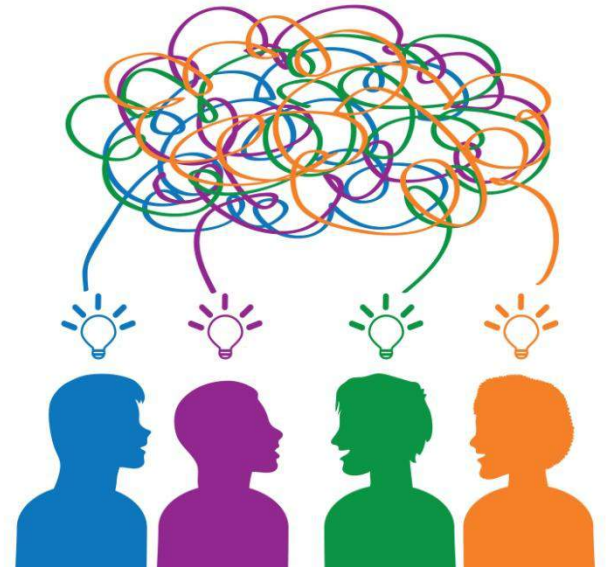
- # of PAC members who are new vs. returning
- # of PAC members who increased contribution level
- # of PAC members who jumped to a higher incentive club
- Cost to fundraise: \$ spent vs. \$ raised
- Average contribution/PAC member (trends over time)
- C-suite/leadership engaged in PAC events/solicitations
- Open rates/change in open rates over time
- Change in bipartisanship over time

PAC Eligible/ Donor Engagement Metrics

- PAC communications sent (newsletters, issue updates)
- # of candidates recommended by PAC board/PAC donors
- # of PAC peer-to-peer champions or ambassadors
 - New recruits
 - # of peer solicitor presentations/solicitations
- # of donor recognition opportunities offered
- Average time for contribution thank you to go out
- # of eligibles who participate in teleconference/briefing

PAC-Eligible Engagement: Quantitative vs. Qualitative

- Who are your stakeholders?
- What do they know?
 - Surveys
 - Focus groups
- Are you increasing PAC chatter?
- What are you doing to educate eligibles?

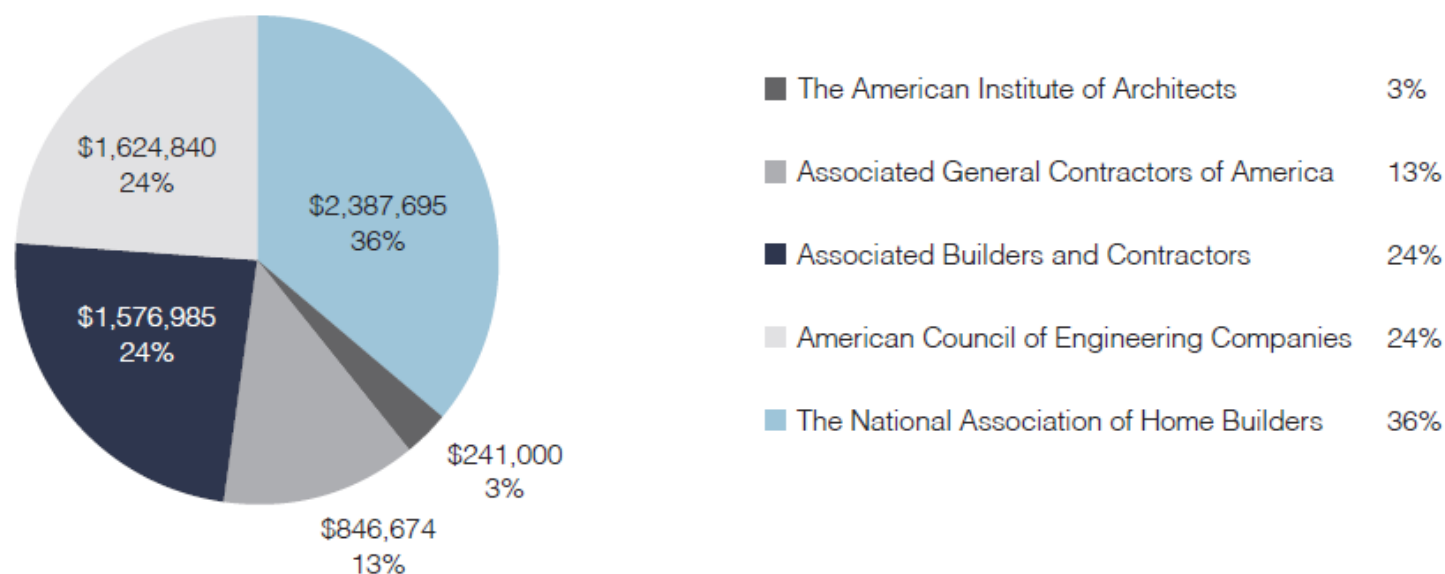


Benchmarking

- Total receipts compared to competitors' PACs
 - FEC
 - Opensecrets.org
- Your activities compared to peers
 - PAC Benchmarking Report
 - Ask!
- Total dollars spent compared to competitors' PACs



Share of Design & Construction PAC Contributions to Candidates in the 2014 Election



Disbursements include donations made to national political party committees.

External Influence

- Number pro-organization or pro-industry candidates in office
- Outreach (e.g. number of fundraisers attended)
- Total dollars matched via PAC match
 - Total charities supported
- Fundraisers hosted
- # candidates given party credit for party contributions



INCUMBENTS*(All incumbents start with 0 points)*

Members of the Leadership (Speaker, Party Leaders, Party Whips, Party Campaign Committee Chairs, Conference/Caucus Chairs) + 4 Points

Chairs of Full Committee + 2 Points

Ranking Member of Full Committee +1 Point

Key Committee Members (Key Committees [for example]: House Transportation & Infrastructure; House Ways & Means; House Small Business; House Science; House Rules; House Energy & Commerce; House Appropriations; House Financial Services; Senate Business & Entrepreneurship; Senate Environment and Public Works; Senate Finance; Senate Energy & Natural Resources; Senate Commerce, Science & Transportation; Senate Appropriations)

+ 2 Points

Champions (designated by VP/Government Affairs in conjunction with staff)
+1 to +4 Points

PAC Member Requests (nominated by Fundraising Champions, based on PAC member input level set by achievement of fundraising goals)

+ 4 to +8 Points

National Party Targeted Candidates
2 or fewer points)

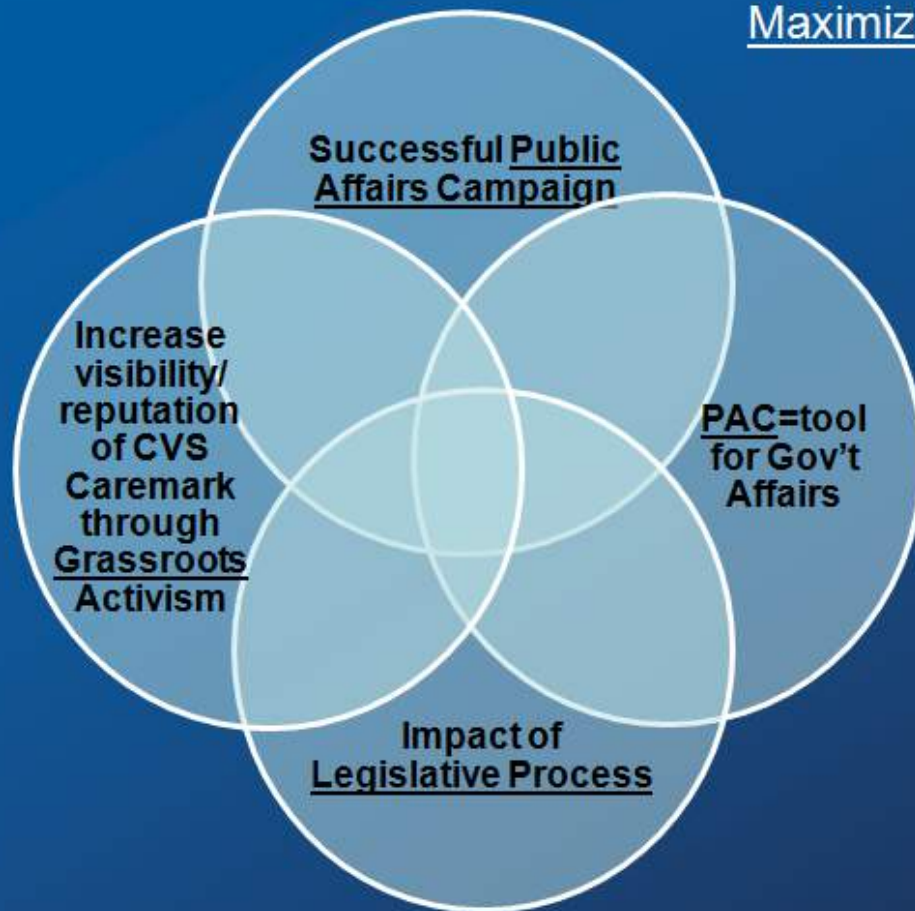
Candidate Point Level	House	Senate
4 or More	\$2,000 to 5,000	\$2,500 to 5,000
3 Points	\$1,000 to 2,500	\$2,000 to 5,000
2 Points	\$1,000 to 2,000	\$2,000 to 3,000
1 Point	\$500 to 1,000	\$1,000 to 2,000
0 Points	0	0

Scope of Influence

- External impact: How many candidates have you supported?
 - How many won?
 - Number pro-industry candidates engaged
- Have you increased conversation around PAC?
- Did your PAC donors engage with candidates?
- Is PAC source of election/political information?
- What is the connection to organizational priorities?

Demonstrating Impact on Organizational Priorities

Maximizing the Government Affairs “Sweet Spot”



Goal-Helping employees understand how legislation and regulation shape CVS Caremark as a pharmacy innovator and as an employer

Outcome-Energized employee base, increased PAC receipts and educated Grassroots advocates able to impact legislative outcomes

Impact-By the Numbers

Number of Employees	200,000
Presence in states, DC, PR	46
Federal legislators	535
State legislators	7,300+

The Goal:

Work smarter.

Measure and adjust.

The Data Dig

Outside your organization:

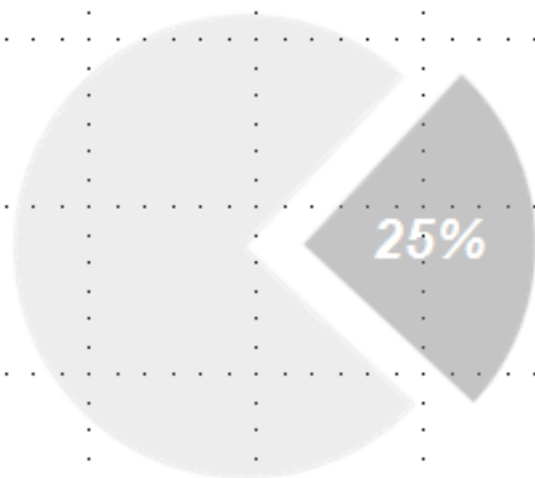
- Fundraising \$ and practices of peers
- Candidates supported by peers

Inside your organization:

- HR data
- Membership data
- Site/location comparisons (Corp)
- Chapter/member comparisons (Assoc)
- Where is your money coming from?
- What does your typical donor look like?



Quality of contribution



\$1-5.00 per pay check



95%

5%

Data sources: *Contribution amount by individual*

How we did it

- Compare data using member IDs
- Use formulas to tabulate results.

Demographic Data

found in membership database

Age

Time since completing Residency

Time since joining AAOMS

Partnership status (solo or group practice)

Contribution Data

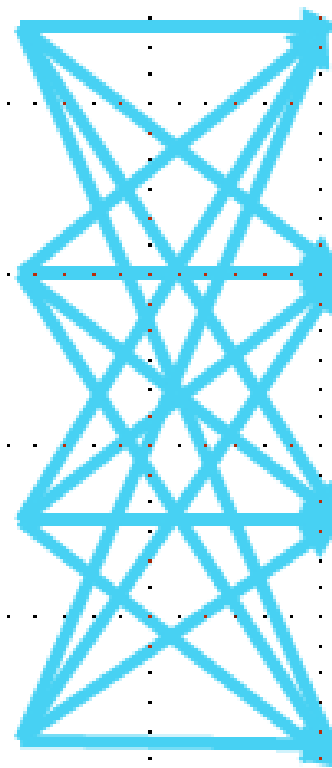
found in PAC records

Total contributions at data point

Average contribution at data point

% Participating at data point

% of total participants that fall in specified grouping



Benefits of Using Your Data

- Identify low-hanging fruit
- Better use your time
- Know your growth potential
 - Know your risks!
- Better explain growth/stagnation
- Create plan of action for leadership to rally behind

Sharing What You Know:

Communicating With Your Stakeholders

Reporting Out

Why it matters:

- Transparency: internal *and* external
- Trust
- Consistency
- Show accomplishments



Reporting Out

- Dedicated reporting to key stakeholders (board, leadership, peer champions)
- Status reports on website/newsletters
- Post-election updates

Division	\$ Goal	Total Raised to Date	% of Goal	Participation Goal	# Participants	% of Goal
Division A	\$52,000	\$37,000	71%	105	78	74%
Division B	\$28,000	\$8,000	29%	49	13	26%
Division C	\$63,000	\$35,000	56%	118	72	61%

PAC ANNUAL REPORT

American Association of Orthopaedic Surgeons



AAOS
AMERICAN ASSOCIATION OF
ORTHOPAEDIC SURGEONS



Chairman Stuart L. Weinstein, MD
pac@aaos.org
317 Massachusetts Ave. N.E.
Washington, DC 20002

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

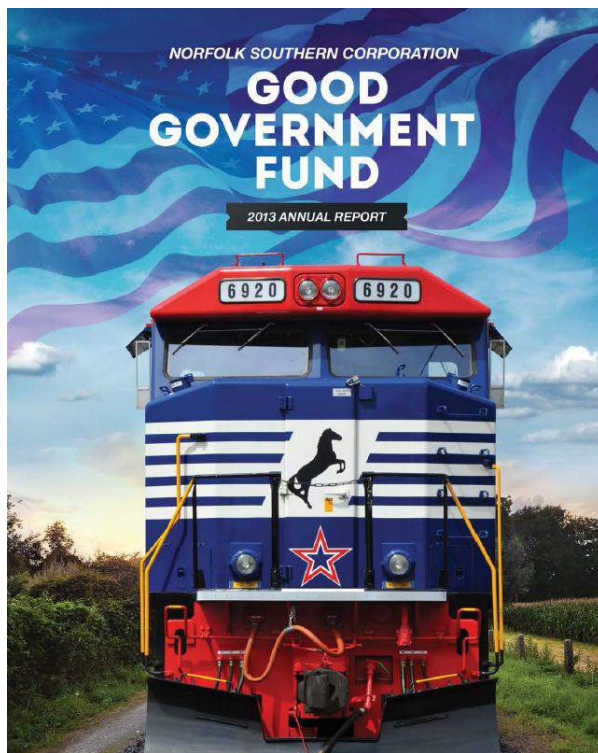
House Totals:

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

*Multiple candidates were supported in some races

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	Elected



GGF supporters gather in Norfolk for a Cookies with the Congressman event hosted by the GGF with special guest Congressman Randy Forbes of Virginia.

Marchant Kenny	\$2,000.00	U.S. House	TX	REP	FC
McCaul Michael	\$5,000.00	U.S. House	TX	REP	FC
Sessions Pete	\$5,000.00	U.S. House	TX	REP	FC
Smith Lamar	\$2,500.00	U.S. House	TX	REP	FC
Williams Roger	\$4,000.00	U.S. House	TX	REP	FC

U.S.

Dem Cong Camp Cmte (DCCC)	\$15,000.00	National Party Cmte-Fed Acct	US	DEM	FC
Dem Sen Camp. Cmte (DSCC)	\$15,000.00	National Party Cmte-Fed Acct	US	DEM	FC
Natl Rep Cong Cmte (NRCC)	\$15,000.00	National Party Cmte-Fed Acct	US	REP	FC
Natl Rep Sen Cmte (NRSC)	\$15,000.00	National Party Cmte-Fed Acct	US	REP	FC
New Democrat Coalition PAC (NDCPAC)	\$5,000.00	Federal PAC	US	DEM	FC
Republican Main Street Partnership PAC	\$5,000.00	Federal PAC	US	REP	FC

UTAH

Constitutional Conservatives Fund (Lee-US S-UT)	-\$5,000.00	Federal Leadership PAC	UT	REP	FC
Constitutional Conservatives Fund (Lee-US S-UT)	\$5,000.00	Federal Leadership PAC	UT	REP	FC

Use Visuals

- Increases understanding of data
- Easy way to show growth, trends
- Tout success stories
- Make it personal
- Show facility/regional/state success



Mayor Sharon Quirk-Silva, middle right, of Fullerton, California and the Fullerton City Council celebrate the relocation and grand reopening of Store 6893, the oldest store in the Western Division.



Congressman Charlie Dent (R-PA), middle right, visits RDC 5034 in Breinigsville, Pennsylvania.

Thank you

Your support of The Home Depot Political Action Committee is critical to accomplishing our goal of helping elect pro-business candidates to public office who understand our position on legislative issues. This helps grow the top and bottom lines of our business, and also protects the values our Company was founded upon.

Through your commitment to our PAC and to *OrangeVoice*, our Company made quite an imPACT:



15TH LARGEST CORPORATE PAC



MATCHED APPROXIMATELY
\$660,000
TO OVER
580 Charities

RECRUITED OVER
2,400
TO JOIN THE PAC OR
INCREASE THEIR CONTRIBUTION



INCREASED COMPANY-WIDE
PAC PARTICIPATION TO
70%

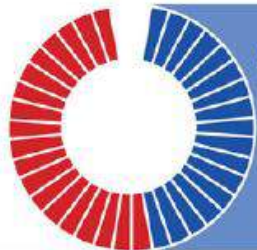


43,300 LETTERS SENT
TO ELECTED
OFFICIALS

RPAC

the #1 trade association political action committee in the nation

NAR advocates for policy initiatives that result in the continued creation of a fundamentally sound and dynamic U.S. real estate market



36 out of 38
President's Circle-targeted races were victorious for the 2012 cycle

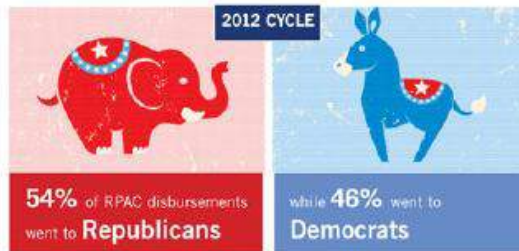
\$

RPAC disbursed
\$4.6 million

in direct contributions to federal candidates, leadership PACs and national political party committees, making RPAC the top PAC in candidate contributions in the 2012 cycle

Average trade association PAC participation is 13%
RPAC has more than **DOUBLE** that

Participation in RPAC rose 4% nationwide from 2012 to 2013 to a whopping
26%

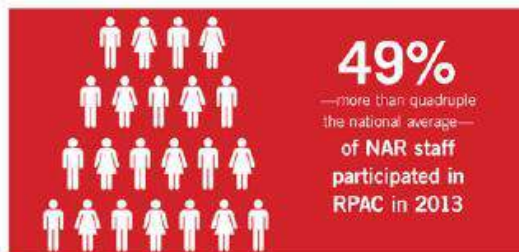


RPAC raised
\$8,111,081
in 2013

a 11% increase over 2012



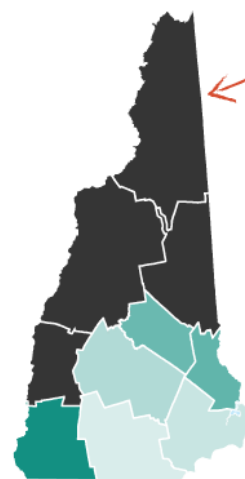
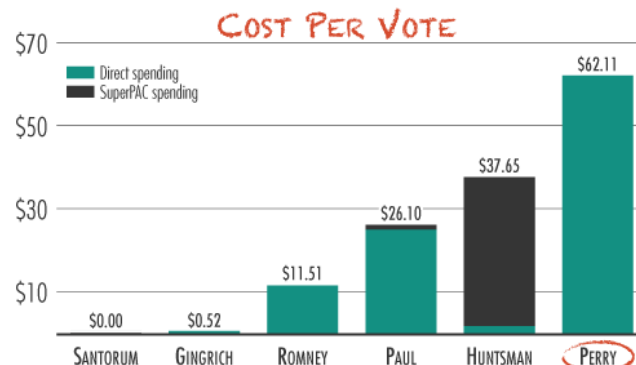
RPAC had
5,504
MAJOR INVESTORS
\$1,000 and up
14%
from last year



49%
—more than quadruple the national average—
of NAR staff participated in RPAC in 2013

THE CO\$T OF WINNING (AND LOSING)

How much each candidate spent per vote in the NH primary*



HOW MUCH PERRY SPENT PER VOTE, COUNTY BY COUNTY

CHESHIRE: \$182.23
HILLSBOROUGH: \$29.37
MERRIMACK: \$60.26
BELKNAP: \$116.35
STRAFFORD: \$122.97
ROCKINGHAM: \$42.13

*Data collected only from Boston media market counties of Cheshire, Hillsborough, Merrimack, Belknap, Strafford and Rockingham.

Sources: PATCH.COM, THE ASSOCIATED PRESS

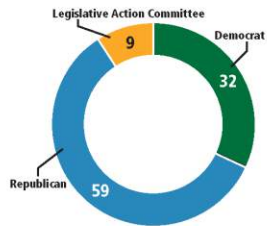
HUFFPOST POLITICS

2014 TREASURER'S REPORT

GROSS RECEIPTS

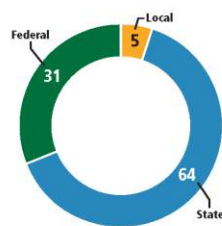


PARTICIPATION RATE



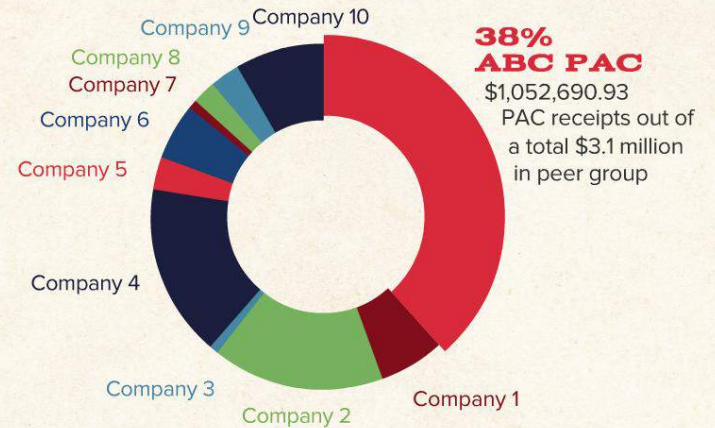
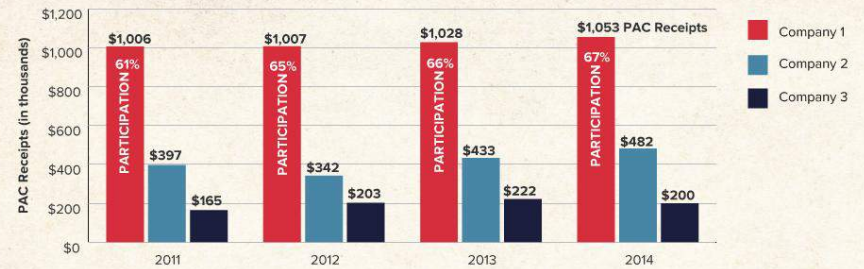
Contributions by Party

Party	Percentage
Democrat	32%
Republican	59%
Legislative Advocacy Committees	9%



Contributions by Level of Government

Level	Percentage
Local	5%
State	64%
Federal	31%



Takeaways

- ✓ Gain consensus
- ✓ Measure on a variety of metrics
- ✓ Benchmark to inspire and to create a baseline/goal
- ✓ Standardize your reporting
- ✓ Invest in your stakeholders
- ✓ Be visual
- ✓ Have fun

Questions?

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