

Measuring and Communicating the Value of PACs

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What We'll Cover



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Today's Agenda

- Metrics and processes that demonstrate both *quantity and quality*
- Sharing metrics effectively with internal stakeholders
- Effectiveness of benchmarking your program
- Connecting your PAC's activities to organizational priorities

How it Feels:



How it Feels:

Leadership:

Desire to outright
connect the dots on
how this helps us
enact legislation

Reality:

What we can actually
measure and say about
the PAC



The Value of Government Relation Activities

Benefits of PAC Engagement

- Build relationships with candidates
- Increase audience's understanding of political process
- Educate candidates on issues, org
- Provide election/political information to further good government
- Advance organizational/government affairs priorities

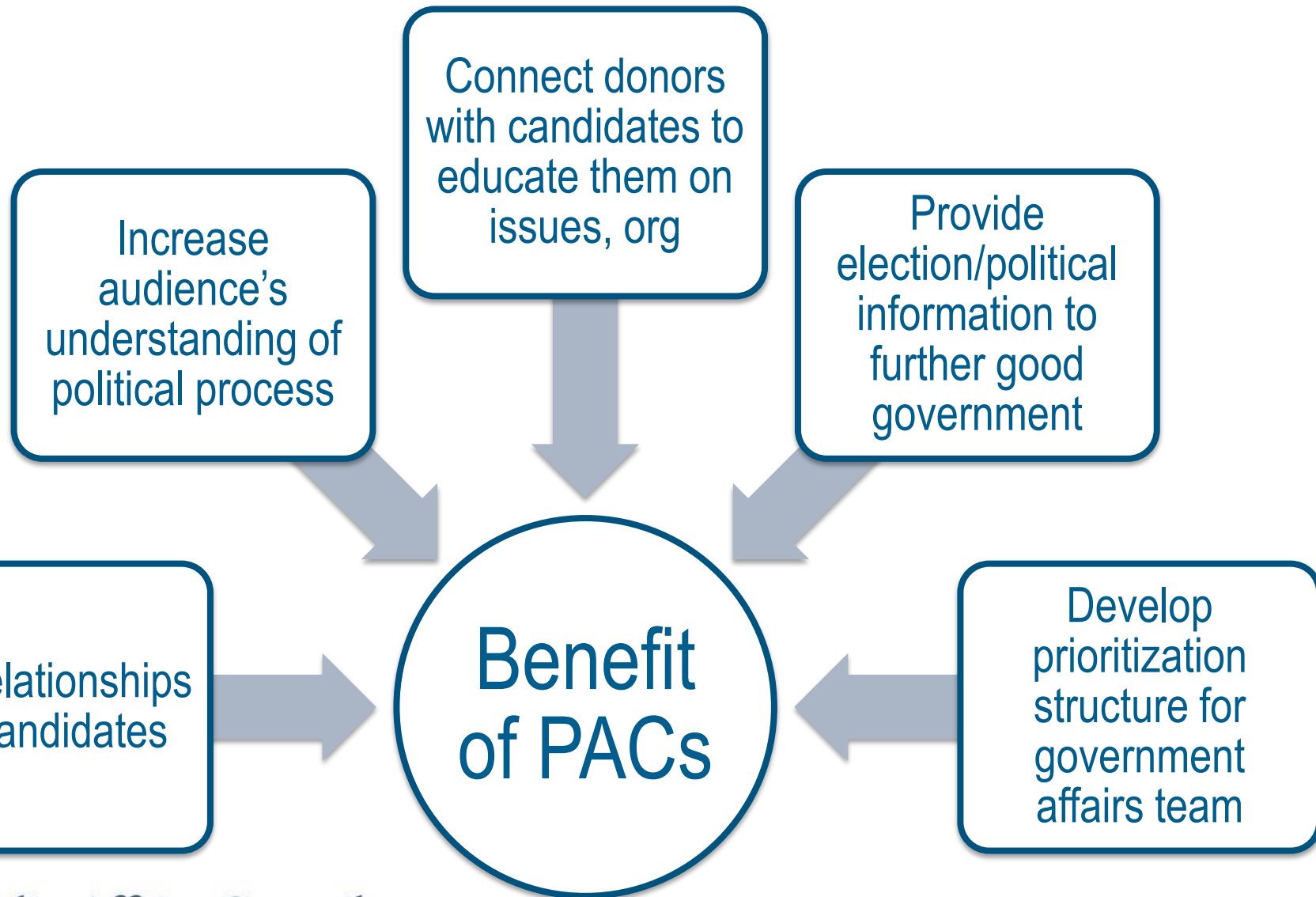
Benefits of Grassroots Mobilization

- Build relationships with legislators
- Increase audience's understanding of issues & process
- Educate lawmakers through personal stories
- Spur specific legislative or regulatory action
- Advance organizational/government affairs priorities

Benefit of Government Relations/Lobbying Strategy

- Build relationships with legislators
- Increase decision-makers understanding of industry/issues
- Educate lawmakers through data and information
- Identify opportunities and threats and means to address them
- Advance organizational values

The Value of PACs



Getting Buy-In on Your Measurement Process

Who's your audience?

Who do you need buy-in from?

Who do you need to report back to?



Getting Buy-In on Your Measurement Process

Who's your audience?

Who do you need buy-in from?

Who do you need to report back to?

Leadership

Board

Donors

Government Affairs colleagues

PAC Board



Getting Feedback

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

WHAT: Which metrics help them understand the PAC?

WHEN: When do they expect to get updates?

HOW: How do they want information shared?
Dashboards, reports, powerpoints, talking points



Defining Success

What are your goals?

- Candidates supported
- Dollars raised
- Eligibles engaged
- Events hosted
- Events attended
- Incentive club/giving level growth



*Is everyone on the same page about
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.

Tried and True Metrics

- Typically, quantitative
- **Database** is a big resource
- Track percentage growth, not just whole numbers

Examples:

- Total dollars raised*
- Participation rates*
- # new PAC members*
- Average contribution*
- # Donors giving at rec. level*
- Donor retention rate
- Disbursement success rate
- Split in partisan giving

*Overall or by segment

Dig Further:

What Else Shows Progress?

- # PAC members who are new vs. returning (typically, association)
- # PAC members who increased contribution level
- # 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

Dig Further: What is Moving the Needle?

Campaign/solicitation engagement

- Senders (make the case for someone sending)
- Subject lines
- Content/brevity
- Incentives
- Visuals



Dig Further: What Shows Donor Engagement?

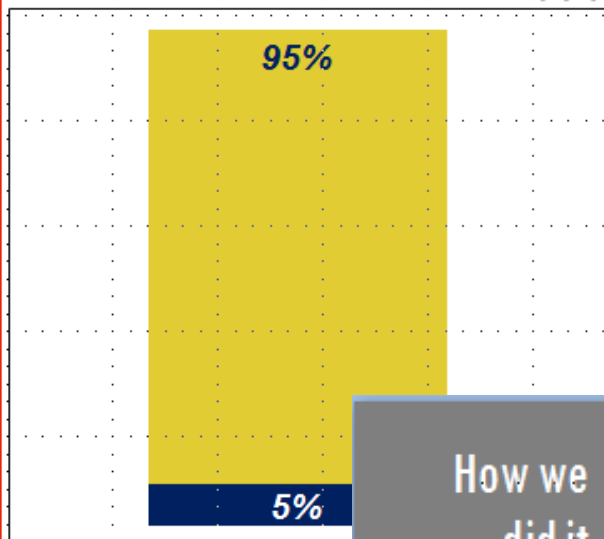
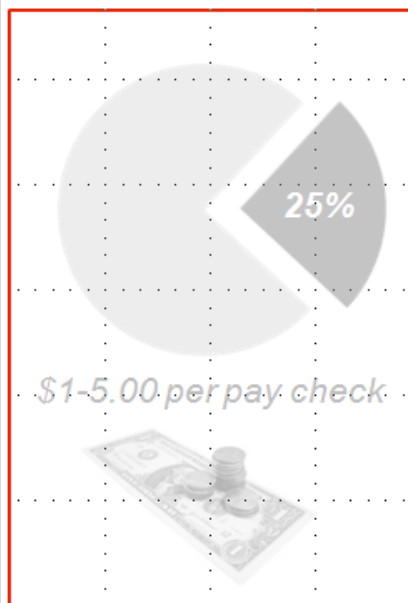
- PAC communications sent (newsletters, issue updates)
- # candidates recommended by PAC board/PAC donors
- # PAC peer-to-peer champions or ambassadors
 - New recruits
 - # peer solicitor presentations/solicitations
- # donor recognition opportunities offered
- Average time for contribution thank you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

Dig Further: Better Understand Your Own Data

- HR/membership data
- Site/location comparisons (Corp)
- Chapter/member comparisons (Assoc)
- Where is your money coming from?
- What does your typical donor look like?
- Where are your **risks and vulnerabilities**?



Quality of contribution



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

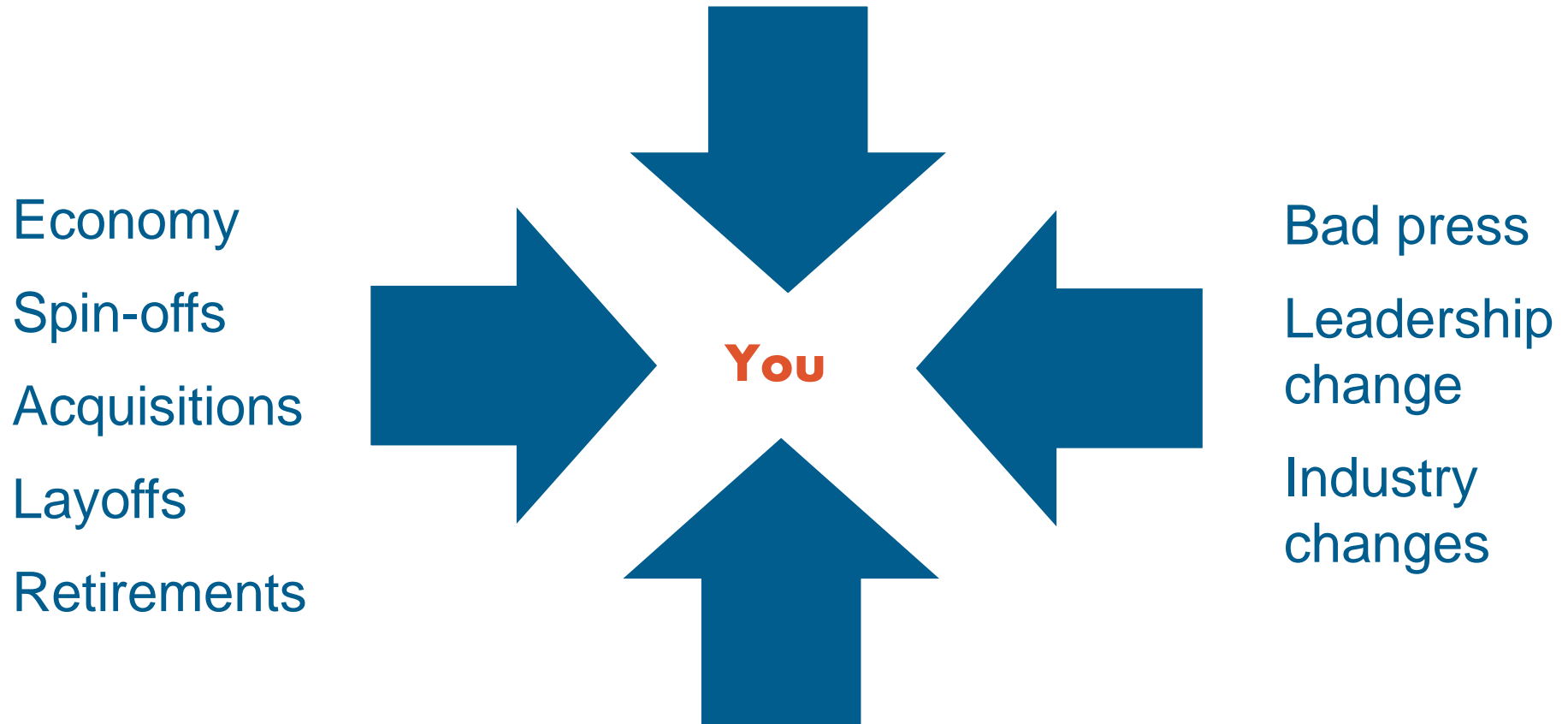
Total contributions at data point

Average contribution at data point

% Participating at data point

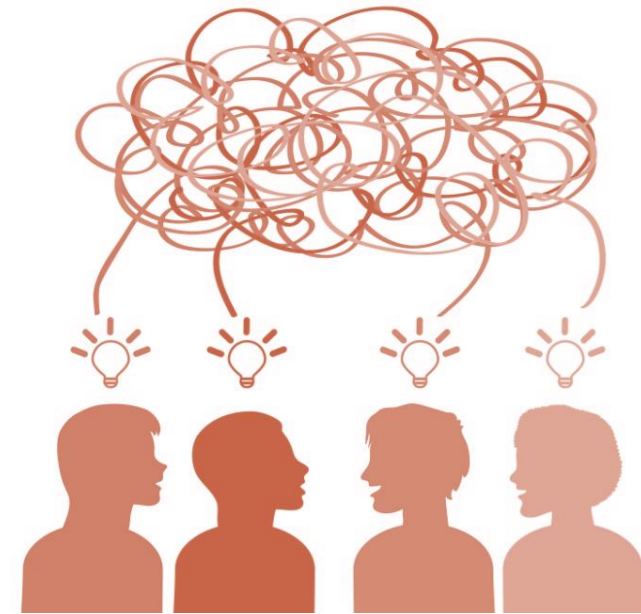
% of total participants that fall in specified grouping

Why Measure So Many Metrics?



Quantitative vs. Qualitative

- Who are your stakeholders?
- What do they know/want?
 - Surveys
 - Focus groups
- Increase in PAC chatter?
- What are you doing to educate eligibles?



Outputs vs. Outcomes

- Disbursements :: Key candidates supported
 - # pro-organization or pro-industry candidates in office
 - Checks delivered by donors
 - Fundraisers hosted/fundraisers attended
 - # candidates given party credit for party contributions
 - Defined process
- Participation rates :: Eligible education
 - Promotion of good government (GOTV)
 - Access to candidates (events for donors)
 - Information about issues (webinars hosted)
 - Conversion on Grassroots side

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)

+ 1 to +3 Points

National Party Targeted Candidates
2 or fewer points)

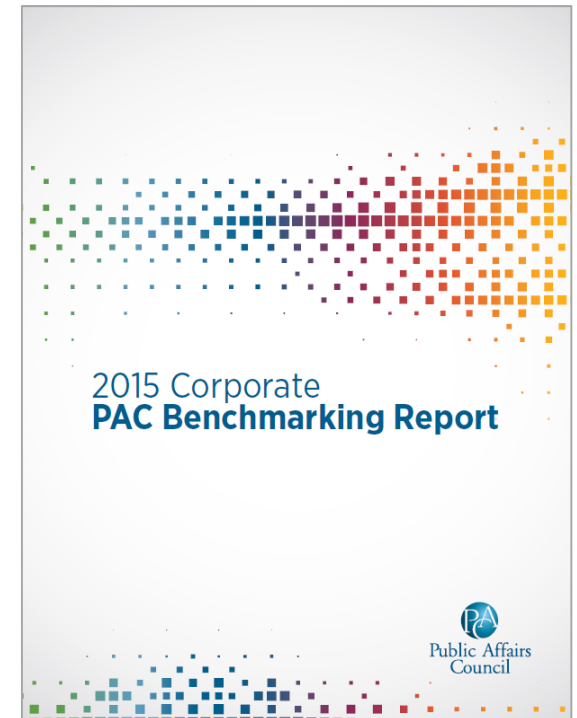
Candidate Point Level	House	Senate
4 or More	\$2,000 to 5,000	\$2,500 to 5,000
3 Points	\$1,000 to 2,500	\$2,000 to 5,000
2 Points	\$1,000 to 2,000	\$2,000 to 3,000
1 Point	\$500 to 1,000	\$1,000 to 2,000
0 Points	0	0

Outputs vs. Outcomes

- Peer recruitment :: Buy-in to the political process
 - Education efforts/training of champions
 - Education of eligibles
 - Senior management engagement
- Total dollars matched via PAC match :: Community engagement
 - Total charities supported
 - Total donors participating in PAC match

Benchmarking Against Peers

- Total receipt/disbursements compared to competitors' PACs
 - FEC
 - Opensecrets.org
- Your activities compared to peers
 - PAC Benchmarking Report
 - Participation rates
 - Contribution amounts
 - Fundraising activities
 - Disbursement processes
 - Ask your peers!



The Goal:

Work smarter.

Measure and adjust.

Be effective.

Track and improve.

Reporting Out

- Dedicated reporting to key stakeholders (board, leadership, peer champions)
- Mimic other functions' reporting mechanisms
- Status reports on website/newsletters
- Talking points for leadership
- 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%

Reporting Out

- How often?
- How will they receive it?
- Who gets what?
 - Leadership vs. board vs. peers vs. donors
- How does it weave into government affairs success?
- Use **visuals**



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

Who contributes to AB-PAC?

YOU DO!

In 2013 you contributed \$388,000 to the AB-PAC. Participation in AB-PAC is growing, and in 2014, AB employees are on track to raise \$454,982. Our goal is to reach \$500,000 pledged for 2015.

\$388,000

CONTRIBUTED IN 2013

\$450,000+

CONTRIBUTIONS FOR 2014 (PROJECTED)

Your AB-PAC is the **THIRD LARGEST** in the beer, wine and liquor industry.

Many company entities increased their participation in 2013!

Houston Brewery +55 pts!	Columbus Brewery +54 pts!	Williamsburg Brewery +40 pts!	Ft. Collins Brewery +33 pts!	Procurement +40 pts!
Legal Department 97%!	CA/COMM 95%!		Supply +16 pts!	People +12 pts!
IBS +10 pts!	Finance +11 pts!	MANCOM 100%!	Newark Brewery +18 pts!	St. Louis Brewery +17 pts!

American Bakers PAC Check Transmittals



Jackie Forrest, Flowers Foods Lynchburg, presents an American Bakers PAC check to Rep. Bob Goodlatte (R-VA-6). Rep. Goodlatte serves on the House Agriculture Committee. American Bakers PAC hosted a food industry fundraiser for Rep. Goodlatte during the 2012 election cycle. He has a 100% key vote rating with the ABA.

Kent Bickford, Clyde's Delicious Donuts, presents an American Bakers PAC check to Rep. Randy Hultgren (R-IL-14). Rep. Hultgren, who serves on the House Agriculture Committee, has a 100% key vote rating with the ABA and won his race for reelection.

Ex: Ongoing Transparency

Monthly

Quarterly

Annually

Cycle

Creative

- Weekly creative meetings to discuss goals and objective and plan editorial calendar

Manager

- Weekly meetings to review events, financial updates

PAC Board

- Summary of quarterly events, communications, and solicitations.
- Assignment or “ask” of the Board each quarter
- Measuring their progress and supporting their needs

PAC annual report

- Annual summary of PAC activity and financial information

CSR

- Reporting externally about company’s human, economic, and environmental impact.
- Portion on political engagement.

Cycle

- Keeping track of trends
- Election outcomes

RESTAURANT PAC 2014 ANNUAL REPORT

2015 PAC Leadership Team



CHAIR
Bill Kohl
Greenwood Hospitality
Group
Harrisburg, PA



VICE CHAIR
Billy Sewell
Platinum Corral LLC
Jacksonville, NC



CHAIR
Candidate Review Subcommittee
Jay Stieber
Lettuce Entertain You
Enterprises, Inc.
Chicago, IL



CHAIR
Purchasing Subcommittee
Tommy Cvitanovich
Drago's Seafood
Restaurant
Metairie, LA

The Restaurant PAC is the industry's leading trade association political action committee and contributes over \$1M each election cycle to pro-restaurant, pro-business candidates for Congress. Supporting and electing industry-minded legislators is the first step toward achieving sound, pro-restaurant legislation. The Restaurant PAC is an important part of our industry's advocacy efforts. For more information, please visit Restaurant.org/RestaurantPAC or contact Annie McEniry at amceniry@restaurant.org or (202) 331-5920.

As the 2014 Chairman of the Restaurant PAC, I'm pleased to report on the active role we played during the midterm election. This was an important election cycle and with your leadership and support, we were able to participate in a meaningful way.

In 2014, Restaurant PAC receipts topped \$620,000, bringing our cycle total to over \$1.29 million. As a result, our industry was able to invest \$1.2 million in over 200 pro-restaurant, pro-business candidates for Congress. Over 90% of our Restaurant PAC supported candidates won their races.

With the election behind us and a new Congress in session, it's important for our industry to stay involved in the political process. We must educate lawmakers about the impact of harmful legislation and work to achieve positive solutions. We need to change the health care law's definition of full-time from 30 to 40 hours, pass a broad tax reform package, and fight back against

anti-business assaults on wage and labor issues. These are just a few examples of the legislative challenges we face, which is why it is important that we continue to defend and promote the restaurant industry.

It has been an honor serving as the Chairman of the Restaurant PAC, especially during such an important election year.

With sincere thanks,



Carl Sobocinski
Owner, Table 301 Restaurant Group
Greenville, South Carolina

RECEIPT ACTIVITY



Legislator and Candidate Spotlight



Congressman Darin Kimer (D-WA-6) with Chef Bill and Monique Trudowski



Senator James Lankford (R-OK) with NRA Treasurer Jeff Davis and NRA Board Member Jim Hopper



Senator Mike Rounds (R-SD) with DeLon Mork, Board President of South Dakota Retailers Association

2014 Disbursements



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	Defeated via recount

2014

Annual Report



CenterPoint Energy Political Action Committee



854 politically engaged employees

CAMPAIGNS SUPPORTED



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

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Refocusing our priorities

By Scott Doyle

This past year, CenterPoint Energy renewed its focus on local and state government activities. We closed our Washington, D.C. lobbying office, as

it primarily supported our FERC-regulated interstate pipeline business, now operated by Enable Midstream Partners. We continue to be active members of national industry associations that advocate our interests at the state and federal levels; however, our electric and natural gas utilities are primarily overseen by state and local regulatory bodies with the support and oversight of state legislatures.

To support our focused efforts, the PAC has adopted a strategy that places a priority on local races that are within the company's operating footprint. We will continue to give to candidates from both parties and seek to develop relationships that reflect our core values as a company.

CNPPAC 2014



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
McCaull 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

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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Public Affairs Council

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