

Technology and Your PAC

March 5, 2018

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Senior VP, Account Mgmt.
& Technology Solutions

ARISTOTLE
New You Know™

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Senior Account Executive

CISION

LEARNING OBJECTIVES

- 1) How can a PAC that is not currently utilizing technology get started with leveraging technology?*
- 2) What are the “basic” technology tools that PACs should have in their toolbox?*
- 3) What are the more “advanced” technology tools that are out there that PACs should consider leveraging?*
- 4) How are PACs utilizing social media in their fund raising efforts?*
- 5) Do you know of any ways that PACs have been able to utilize apps in their fund raising?*
- 6) How are eligibles looking to receive information about the PAC? What’s the best way to reach them?*
- 7) What are some of the technology trends that PACs should be considering in the future?*
- 8) How can you leverage digital advertising for PACs?*
- 9) What free tools can PAC professionals use?*

Steps for Pursuing a Technology Platform

1. Conduct a Needs Assessment

- a. Goals & Expectations
- b. Level of Engagement
- c. Desired Functionality

2. Conduct an Organizational Readiness Assessment

- a. Budget?
- b. IT/Payroll/HR
- c. Marketing/Communications/Branding

3. Assess the Market

- a. Peer Survey/Best Practices
- b. Interview Technology Providers
- c. Map Offerings to Needs & Organizational Readiness

GETTING STARTED

- Talk to your peers about the PAC software solution they are using. Ask these four questions:
 - What kind of annual costs should I expect?
 - How is the technical support and account services?
 - What do you like/dislike about working with them?
 - What is the best/worst feature?
- Make calls to set up demos > Ask for proposals > Develop a budget
- Prepare an outline of the efficiencies you gain. How will this software streamline tasks and help your PAC grow?
- Get needed approvals. Market your plan.
- Who are other stakeholders who need to be consulted? IT/HR?
- Think about timing. When is the right time of year to do this? When do you have bandwidth?

Basic Technology

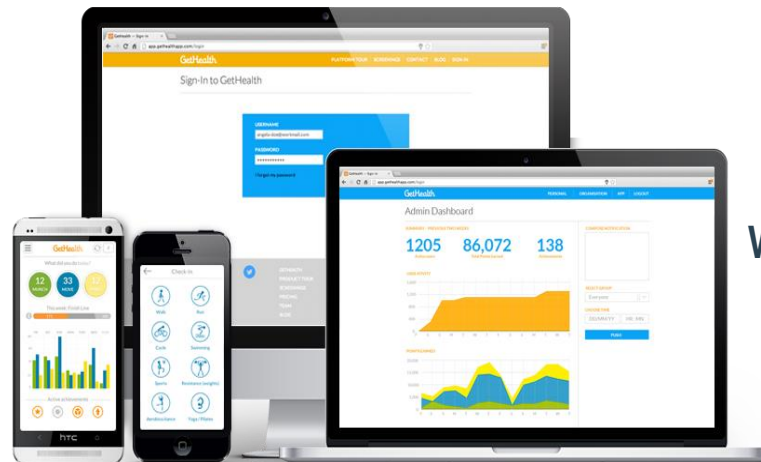
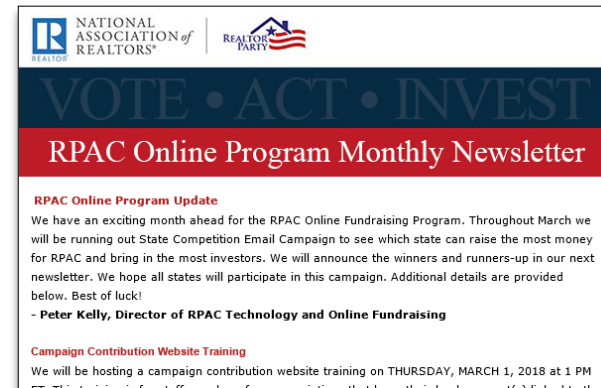
- A PAC database that differentiates between existing donors and your non-contributing eligible class.
- Managing receipts and disbursements that is not a spreadsheet. You should have a tool that is enforcing legal limits on both.
- A suite of standard reports that minimize the endless hours of creating Excel spreadsheets.

Basic Tech Toolbox

PAC Database



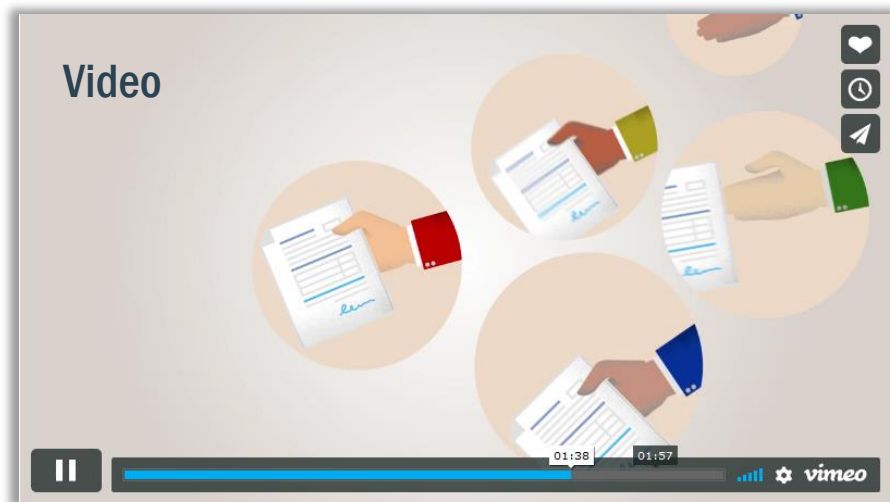
Newsletters



Web/Mobile Presence

Advanced Technology Tools

Infographics



Advanced Technology Tools

Budget Tracking

First Name	Last Name	District Type	State	Party	Total Budget	Total Disbursement	Remaining Budget	Lobbyist
Robert	Aderholt	Federal House	AL	Republican	\$10,000.00	\$6,000.00	\$4,000.00	Edwin Eifmann, Edwin Eifmann
Mo	Brooks	Federal House	AL	Republican	\$1,000.00	\$0.00	\$1,000.00	Edwin Eifmann
Bradley	Byrne	Federal House	AL	Republican	\$10,000.00	\$5,000.00	\$5,000.00	Lawrence Seyfried, Lawrence Seyfried
Gary	Palmer	Federal House	AL	Republican	\$5,000.00	\$2,500.00	\$2,500.00	Edwin Eifmann
Martha	Roby	Federal House	AL	Republican	\$10,000.00	\$4,000.00	\$6,000.00	Edwin Eifmann, Edwin Eifmann
Mike	Rogers	Federal House	AL	Republican	\$10,000.00	\$1,000.00	\$9,000.00	Edwin Eifmann
Terri	Sewell	Federal House	AL	Democratic	\$7,500.00	\$2,500.00	\$5,000.00	James Ballentine
Rick	Crawford	Federal House	AR	Republican	\$7,000.00	\$1,000.00	\$6,000.00	Edwin Eifmann
French	Hill	Federal House	AR	Republican	\$10,000.00	\$5,000.00	\$5,000.00	Lawrence Seyfried, Lawrence Seyfried
Bruce	Westerman	Federal House	AR	Republican	\$5,000.00	\$3,000.00	\$2,000.00	Edwin Eifmann


Advanced Technology Tools

Event Management

Date/Time	Location Information	Candidate Information	Budget	Contribution Information	Contributions	Committees
01/09/2018 Fundraiser 6:30PM	Lou Correa For Congress Event 15 E Street, NW Washington DC 20001	Rep. Lou Correa House -CA-46	Budget: \$3000.00 Spent: \$1000.00 Avail: \$2000	\$1,000.00	Guest - \$ 1,000 Co-Host - \$ 2,500 Host - \$ 5,000	House Homeland Security, House Veterans Affairs
01/12/2018 Fundraiser 12:00AM	Nebraska Sandhills PAC TRIP - Annual Vail Ski Weekend 1 Vail Road Vail CO 81657	Sen. Deb Fischer Senate R-NE-00	Budget: \$5000.00 Spent: \$5000.00 Avail: \$0	\$5,000.00	Personal - \$ 2,500 PAC - \$ 5,000	Senate Commerce, Science & Transportation, Senate Environment & Public Works, Senate Armed Services, Senate Rules & Administration, Special Committee on Aging, Senate Agriculture, Nutrition & Forestry
01/29/2018 Fundraiser 12:00PM	Walters For Congress VIP Transportation Lunch 1201 Pennsylvania Avenue, NW Washington DC	Rep. Mimi Walters House -CA-45	Budget: \$3000.00 Spent: \$1000.00 Avail: \$2000	\$1,000.00	Individual Attend - \$ 500 PAC Host - \$ 2,500 Individual Host - \$ 1,000 PAC Attend - \$ 1,000	House Energy & Commerce
02/06/2018 Fundraiser 6:00PM	DeFazio For Congress Reception Washington DC 20005	Rep. Pete DeFazio House -OR-04	Budget: \$0.00 Spent: \$10000.00 Avail: \$-10000	\$5,000.00	Co-Host - \$ 2,500 Sponsor - \$ 1,000 Individual - \$ 500	House Transportation & Infrastructure


PAC Champion Toolkit

[mobile web apps]



LOBBYIST

Rep. Paul Ryan (WI - 01)
 Room 1233
 LHOB- Longworth House Office Building
 15 Independence Avenue, SE
 Washington, DC, 20515
 202-225-3031



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PAC Contributions

PAC Contributions Primary 2020:\$0.00
 PAC Contributions General 2020:\$0.00
 PAC Contributions Other 2020:\$0.00
 PAC Contributions Primary 2018:\$5,000.00
 PAC Contributions General 2018:\$0.00
 PAC Contributions Other 2018:\$0.00


f   in 

PAC Champion Toolkit

[mobile web apps]

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Tracked Bills
Does not sponsor any tracked legislation.

Tracked Votes
Has not participated in any tracked votes.

Contributions
Contributions General 2016: \$4,000.00

Voter/Consumer/ Contributor Analysis

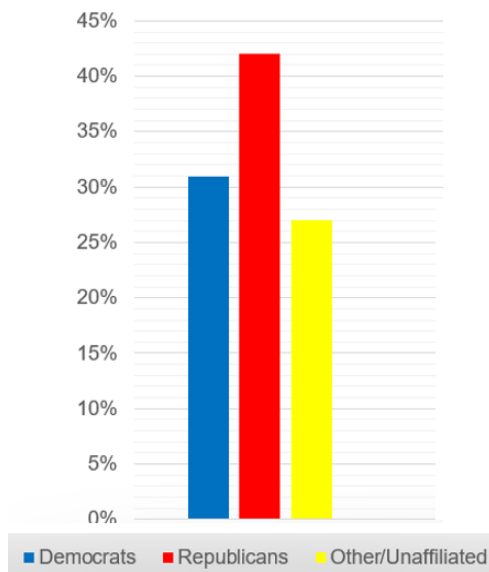
Analysis of Your Eligible Class

- + Party Affiliation
- + Age/Demographics
- + Vote Frequency
- + Direct Political Giving
- + Interest Areas

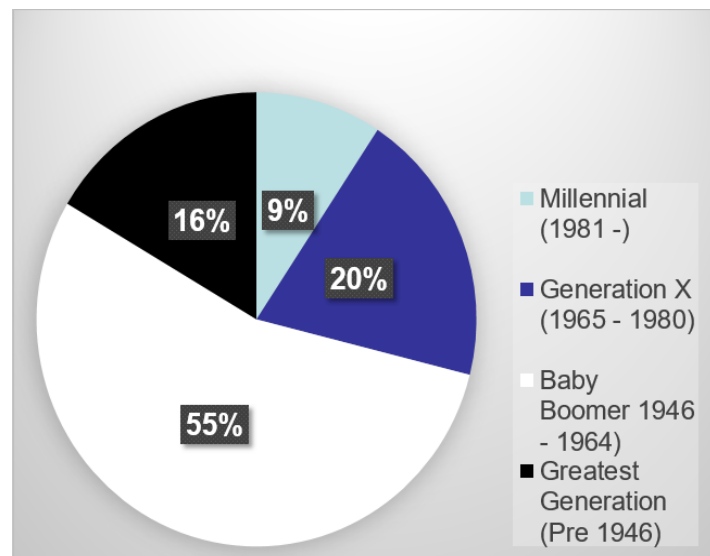
Voter/Consumer/Contributor Analysis

Build a profile of your eligible class to help inform your messaging and target your solicitation effort.

Party: Membership



Generational Breakdown




Soliciting Direct Contributions

<p>Sen. John Barrasso (R - WY) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Rep. Don Beyer (D - VA - 08) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Rep. Diane Black (R - TN - 06) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>
<p>Rep. Earl Blumenauer (D - OR - 03) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Sen. Roy Blunt (R - MO) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Rep. Kevin Brady (R - TX - 08) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>
<p>Sen. Sherrod Brown (D - OH) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Rep. Cheri Bustos (D - IL - 17) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>	<p>Sen. Shelley Capito (R - WV) ★ Committee Assignments</p>  <p>\$ <input type="text"/> Contribute</p>

Advanced Technology

- Dynamic donor forms and web content
- Payroll deduction calculators
- Disbursement Approval Portal to facilitate multiple approvals by executives or your PAC Board
- Online portal for Prior Approval management
- FEC Address Switcher Management tools

Dynamic Donor Recognition

My advocacy profile

Arch iPACDonateFAQsDonorsCommitteesCandidate SupportAction Center

their engagement, Arch iPAC has created a separate donor level rewards program.

Champion Circle - \$5,000

2 AIA Members

Mr. Mattia J. Flabiano III, AIA

Mr. Ellis L. McIntosh Jr., AIA

Platinum - \$2,500 to \$4,999

(Emerging Professional \$500 and more)

16 AIA Members

Ms. Venesa Alicea, AIA
Mr. Carl Elefante, FAIA
Robert A. Ivy Jr., FAIA
Mr. Eric R. Kuehmeier, AIA
Mr. Justin A. Mihalik, AIA
Mr. Jered Minter, AIA
Mr. Burton L. Roslyn, FAIA
Ms. Korey D. White, AIA

Mr. Nicholas A. Caravella, AIA
Christopher M. Huckabee, AIA
Ms. Brandy S. Koch, AIA
Mr. Luke E. McCary, AIA
Mr. Ross J. Miller, Assoc. AIA
Carol Pedigo, Hon. AIA
Joseph A. Simonetta
Mr. Gregory A. Yager, AIA

Gold - \$1,000 to \$2,499

(Emerging Professional \$250 to \$499)

37 AIA Members

Mr. Jason M. Archibald, AIA
Michael Burridge

Mr. J. C. Ball, AIA
Torrey Stanley Carleton, Hon. AIA

Claire McDonough
2706 Jefferson Dr
Alexandria VA
22303-1333

EDIT PROFILEVOTER REGISTRATION

LOG OUT

Arch iPAC raised
\$122,152.25

of Arch iPAC
donors: 953

Dynamic Donor Forms and Calculators

Your Info

PROFILE INFORMATION for

First & Last Name: vocus vocus
Employee Number: vocustest

RESIDENCE INFORMATION

Street Address: 2706 jefferson Dr
City, State, Zip: Alexandria, VA 22303-1333

YOUR EMAIL ADDRESS

☒ grsupport@vocus.com

Select the option below to edit your work email address.

☐

Your Pledge

Please indicate your pledge decision below.

1. YES, I support the RAYPAC goals and want to participate as follows:

Through Payroll Deduction: Please deduct the following from my paycheck each pay period until further written notice from me.

- ☐ \$192.30/pay period (\$5,000 max. allowable per year)
- ☐ 1% of base salary; Founders' Club [calculate!](#)
- ☐ 1/2 of 1% of base salary; Chairman's Club* [calculate!](#)
- ☐ 1/4 of 1% of base salary; Presidents' Club [calculate!](#)
- ☐ \$10 per pay period

*Our most popular contribution level

If you wish to contribute an amount other than what is listed above please email the RAYPAC team at raypac@raytheon.com

2. I would like to designate my contribution to go to:

- ☒ Undesignated.
- ☐ Please direct my contribution to Republican candidates.
- ☐ Please direct my contribution to Democratic candidates.

CLICK ON THE NEXT STEP BUTTON BELOW TO CONTINUE

NEXT STEP



Dynamic Disbursement Maps

Map

Where we give.

We give to candidates at the state and federal levels to ensure we have the best representation for our industry and at all levels of government.

Scroll over a state to learn who our constituent representatives are.



IMPORTANT LINKS:

FAQ
LEARN

GIVE

BACK TO TOP

Florida



Sensors

Senator Bill Nelson(D)
Senator Marco Rubio(R)

Cape Canaveral Air Force Station (SSG)

Representative Bill Posey (R-FL-08)

Defense and Commercial (DSG)

Representative Bill Posey (R-FL-08)

Defense Electronic Systems Clearwater (DSG)

Representative David Jolly (R-FL-13)

Missile Products Palm Beach Gardens (DSG)

Representative Patrick Murphy (D-FL-18)

Space Launch KSC (SSG)

Representative Bill Posey (R-FL-08)

Space Launch Systems (FSG)

Representative Bill Posey (R-FL-08)

CISION®
Government Relations

CISION®

Disbursement Portal

Check Request Home			FAQs			
Request Details						
previous page						
Approve (Yes) Deny (No)			Name of Requestor		Email of Requestor	
<input type="radio"/> Approve <input type="radio"/> Deny		<input type="button" value="Submit"/>	GREGORY M HINES		greg_hines@uhg.com	
Political Committee			Candidate Name			
Friends of Randi Becker - 2016			Becker, Randi			
State or Federal/Type	Party	Chamber	State	District Number	Amount of Request	Election Cycle
State/Corporate	Republican	Senate	WA	002	50.00	2016 WA Primary Election
Type of Event	Date of Event	Comments				
One on One Meeting	7/25/2016					
Budget Name		Budget Amount	Disbursed Amount	Pending Approval	Total Towards Budget	Total Available
2016 Master Budget - Corporate - EXCEPT CA and GA		\$100.00	\$0.00	\$100.00	\$100.00	\$0.00
Disbursement Amounts already approved						
2016 WA General Election:		\$950.00				
2016 WA Primary Election:		\$950.00				

How Can You Use Social Media for Your PAC?

- Cautiously!
- Talk to your PAC Counsel.
- Develop internal guidelines.
Know what you can say.
What you can't.
- “Facilitation” is your key word.
- Your members and employees hold the power
- Educate them on how they can help
- Be creative within your guidelines
- Focus on recognition and aspiration



Maura Carey Neill

February 12 at 11:08am · 🌐

What an exciting day! My first #RPAC Hall of Fame pin is here!



#powerofR #voteactinvest #morethanhouses #PlatinumR #PresidentsCircle



Like



Comment



Share



You, Kenny Parcell, Gail Ackerson Hartnett and 196 others

LkldREALTORS @LkldREALTORS · Feb 23

Lakeland REALTORS® would like to recognize and thank our 2017 RPAC Major Donors. #Realtor #RealtorParty #LakelandREALTORS #RPAC #NAR #MajorDonors #FloridaREALTORS

Thank Your Local REALTOR® Champions!

THESE MEMBERS ARE PROUD ADVOCATES
OF PRIVATE PROPERTY RIGHTS:

Crystal "R"



Dawna Stone
Property Shoppe
of Central Florida

Sterling "R"



Barbara Barnes
Lakeland REALTORS®



Robert "Sean" Harper
WebPro Realty



Deborah "Debbie" Miller
Brooks Chandler Realty



Robby Sampson
The Mortgage Firm
Lakeland



Dean Saunders
CBC Saunders
Real Estate



James "Jim" Steinbauer
Steinbauer Associates



FLORIDA REALTORS® PAC
Invest in Your Profession

Paid political advertisement paid for by the Realtors® Political Action Committee.



REALTOR® Party @RealtorAction · Jan 31

1/ Congrats to the 24 states that met 5 #RPAC goals to win the 2017 Triple Crown Award! @ArkRealtors @COREALTORS @floridarealtors @Idaho_Realtors @ILREALTOR @kyrealtors @larealtorsassn @mainerealtors @MOREALTORS @NE_REALTORS @nmrealtorsassn @okrealtors @PARealtors @RI_REALTORS



NATIONAL
ASSOCIATION of
REALTORS®



2



10



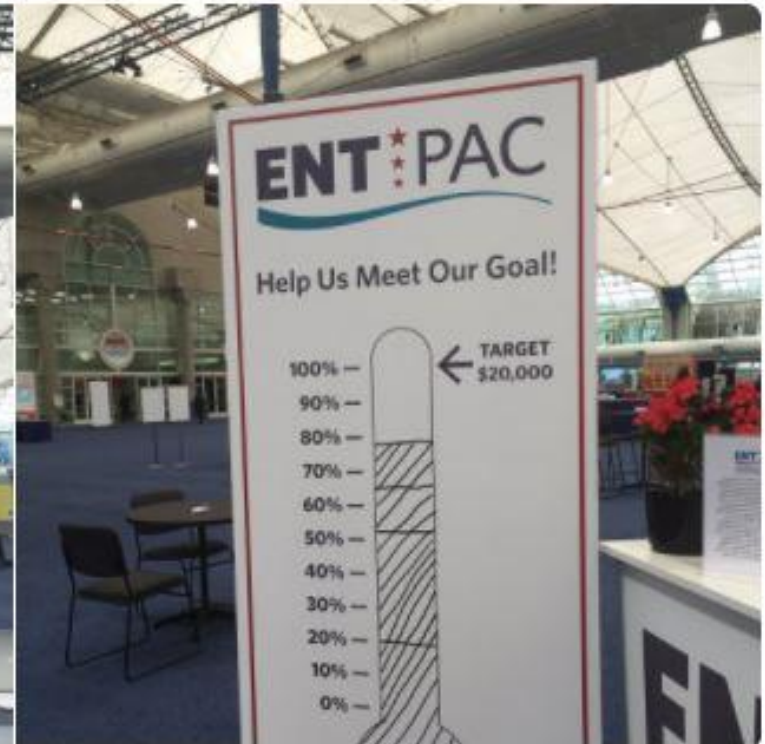
13





Sujana Chandrasekhar @SujanaChandrase · 20 Sep 2016

Put your money where your mouth is! Give to **#ENTPAC** @AAOHNSGovtAffrs we're 80% there already! At Sails Pavilion @SanDiegoCC #otomtg16





AIA Gulf States Emerging Professionals

May 2, 2016 · 🌐

👍 Like Page ...

Hello, EPs!

ArchiPAC is looking to fill an Emerging Professionals Fundraising Committee. They need representation from every region. You may be an Assoc. AIA or Young Architect member to apply. This is a great opportunity to become involved with the advocacy group of AIA by engaging and educating EPs and members throughout the country! Multiple people may be selected to represent the Gulf States, so don't hesitate! You can inquire by PM or email our Regional Director Christine Furey at fureyca@gmail.com.

[#assocaia](#) [#archipac](#) [#youngarchitect](#) [#aia](#) [#aiaepgs](#)

You can find out more about ArchiPAC at archipac.org

👍 Like

💬 Comment

➦ Share





Mike Pence  @mike_pence · 10 Oct 2012

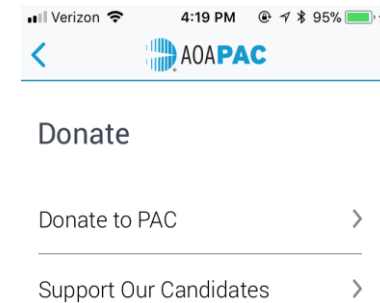
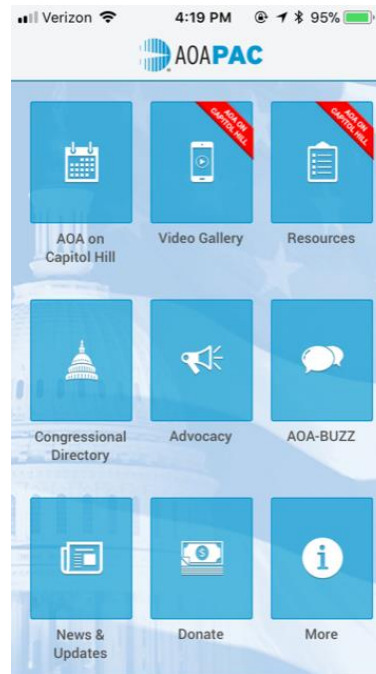
#Mike4Gov addressed members of #LillyPAC this morning to talk about his #RoadmapforIN: RoadmapforIndiana.com.



Social Media Utilization



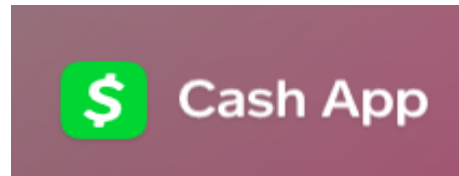
Using Apps to PAC Fundraise



What's the best way to reach your eligible class?

- Ask them!
- There is no ONE WAY. There is no RIGHT WAY. The only WRONG WAY is: We've always done it this way.
- Evolve. Experiment. Test.
- Remember you don't have one culture. You have many micro-cultures.
 - Use your data
 - Develop a solicitation plan for each

Future Trends



Future Trends

- Smashing of Silos
 - Government Affairs and Communications merging into one strategic Public Affairs unit.
 - Focus on identifying, leveraging and deploying your influencers.
- Content driven. Message will matter more.
 - Content curation. Less is more.
 - Content automation. Leverage your data. Make it immediate.
 - Make it mobile.
 - Transparency and authenticity will increasingly make a difference to your success.

Free Resources

WIX.com

 VENNGAGE

web.com®



 infogram

SiteBuilder.com

Questions and Discussion

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ndesarno@pac.org

ARISTOTLE
Now You Know™

CISION®



Public Affairs Council