



YOUR MONEY • YOUR IMPACT • YOUR VOICE

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*Planning Your Campaign*

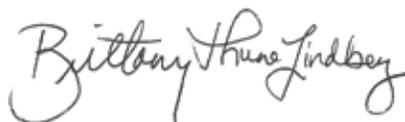
## Your Support Matters.

CouncilPAC champions like you are the heart of The Council’s legislative efforts on behalf of our 200+ member firms. We appreciate the time and energy you put into promoting CouncilPAC within your firm, and we hope this toolkit helps make your advocacy as simple and effective as possible. If you need any other resources, please do not hesitate to reach out.

Thank you for your support!



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*P.S. If you have any ideas or success stories for improving this toolkit and helping other firms succeed, we'd appreciate your feedback!*



## What is CouncilPAC?

CouncilPAC is The Council’s political action committee, which represents the interests of the insurance brokerage industry. Relationships matter in Washington, just as they do in our business, and contributions given to CouncilPAC are one of the most effective ways for The Council’s government affairs team to build relationships with members of Congress. CouncilPAC is the backbone of The Council’s advocacy efforts and is the largest PAC in the insurance industry.

# 4 Questions to Plan Your Campaign.

## 1. WHAT'S YOUR OVERALL GOAL?

First and foremost, individuals within your firm must understand the value and importance of political advocacy. Additionally, I typically will set a numeric goal for your firm, however firms are encouraged to set their own!

Do you want to raise a certain amount? Reach a certain percentage of participation within your firm? Top what you raised last year?

## 2. WHO'S YOUR POINT PERSON?

The feedback we've received is that it's most effective to designate one person to own the campaign.

Who will be your CouncilPAC champion? It should be someone who's familiar with The Council and can articulate the importance of having a say in Washington.

### People to Consider

- President/CEO
- Members of leadership team
- High-level executive assistants
- Employees actively involved with The Council
- Individuals engaged in political advocacy

It is also important to define how the CEO and other leadership will support the campaign. They may be asked to send emails, speak at meetings and donate to the campaign themselves.

## 3. WHO'S YOUR TARGET AUDIENCE?

Will you target staff above a certain level? Or maybe base who you ask on book size?

(See page 4 for how this could look)

## 4. WHAT WILL YOUR ASK BE?

Once you've introduced your colleagues to CouncilPAC and emphasized the value it brings to advancing our industry's interests, it helps to build excitement around the initiative and make the act of giving as effortless as possible.

### Make it Fun!

Contributions are not permitted to be a factor in employment status – but you **can** create non-employment incentives. You might rally your team around a specific goal and create a reward for reaching that goal, either for contributors only or the whole office. Some ideas to spark your creativity:

- Lunches, happy hours or weekend picnics/BBQs
- Extra vacation days, casual days, etc.
- Matching contributions with gifts to charity
- Trophy for firms with internal competitions

*(Please note that any personal out-of-pocket expenses are considered contributions and are counted as part of your maximum contribution. This does not apply if the expenses are covered by your firm.)*

## Money Talk

### 1. One-Time Donations

Individuals may send pledge forms directly to CouncilPAC, or your CouncilPAC point person can collect and send them all at once.

### 2. Payroll Deduction

Allows individuals to seamlessly contribute in smaller increments over the course of a year. This reduces the hassle of tracking pledge cards and checks.

### 3. Online Giving

Contributors may log in and donate at [ciab.com/CouncilPAC/Donate](http://ciab.com/CouncilPAC/Donate).

## Recommending Levels of Giving

It goes a long way when you communicate with your colleagues, “suggested donation” language with a dollar range. Just be sure to make clear that all contributions are voluntary, that these are mere suggested levels, and that the employee may contribute at any level – or not at all – without any benefit or disadvantage. Here are a few examples:

### Example 1

*(Levels Recognized at Council Meetings)*

- Chairman’s Club:
  - Platinum Phoenix – \$5,000
  - Titanium Thunderbird – \$2,500
- Golden Eagle: \$1,000
- Eagle: \$500

### Example 3

- Senior Leadership: \$1,000 – \$1,500
- Producers: \$500 – \$750
- Account Executives: \$250 – \$500
- Others: \$50 – \$250

### Example 2

- Shareholders: \$500 – \$1,000
- Producers: \$300 – \$500
- Managers: \$100 – \$250
- Others: \$25 – \$100

### Example 4

- Board Members: \$2,000+
- Senior Leadership: \$1,000+
- Producers: \$500+
- Account Executives: \$100+

## What is a CouncilPAC Bird?

Representing a bird on your badge at Council events shows The Council and your broker colleagues your commitment to and financial support of CouncilPAC.



Platinum  
Phoenix  
\$5,000



Titanium  
Thunderbird  
\$2,500 – \$4,999



Golden  
Eagle  
\$1,000 – \$2,499



Eagle  
\$500 – \$999

\*CouncilPAC firm leaders may also request birds to be sent to their office to recognize all those who support CouncilPAC within their firm at these levels. We are always happy to help with this request!

## Building & Branding Your CouncilPAC Messaging

We encourage CouncilPAC firm leaders to create their own messaging that will best appeal within their firm. Below are a few staples that are consistent among all outreach:

- The Council membership consists of the top 200+ brokers in the U.S. and abroad.
- The Council's member firms represent 90% of the commercial insurance space. Additionally of the 181 million Americans who receive their insurance through their employer, our member firms advise 70% of those health plans.
- Relationships matter in Washington, just as they do in our business, and contributions given to CouncilPAC are one of the most effective ways for The Council's government affairs team to build relationships with members of Congress. There is a timeless saying in Washington... if you aren't at the table you're on the menu!
- By making a contribution to CouncilPAC, you are establishing a personal investment in your livelihood and the future of your business.
- PAC dollars are the "hard" political dollars (as opposed to "soft" or "SuperPAC" dollars) that go directly to the campaigns of candidates.
- Contributions are strictly voluntary and you have a right to refuse to contribute without reprisal.

## Example of a CouncilPAC Campaign Outreach Email

All—

XXX belongs to The Council of Insurance Agents and Brokers, the premiere insurance industry association – representing the top 200 domestic and international brokers to our legislative, lawmaking leaders in Washington, DC.

CouncilPAC is a political action committee that supports these efforts by making contributions to candidates and lawmakers who champion the priorities of The Council, and who address the pressing and complex issues facing our industry and clients.

There's a timeless saying in Washington regarding representation...if you aren't at the table, you're on the menu.

XXX supports CouncilPAC – and our support is critical to their work. More importantly, it's an investment in our industry, our business, and our livelihoods.

This year, we have a goal of raising \$xxx for CouncilPAC. I have outlined suggested giving levels below for those who are new to our annual campaign:

LEVEL 1: \$50

LEVEL 2: \$100

LEVEL 3: \$500

LEVEL 4: \$1,000

Contributions can be made online (log-in required) or via the attached pledge card. Please submit contributions to [gracie.gerlach@ciab.com](mailto:gracie.gerlach@ciab.com) by \_\_\_\_,2020. Contributions are voluntary and you have a right to refuse to contribute without reprisal.

Thank you for your consideration.

# Putting it All Together

Many firms have found success with a 30 - 60 day campaign, but we encourage you to do what works best for you. However, we ask that you make every effort to run your campaign prior to Labor Day weekend to ensure your firm is recognized at our annual Insurance Leadership Forum (ILF) meeting. Here's a sample timeline to help you plan:



# Legal Info

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## WHO YOU CAN SOLICIT

The FEC limits solicitation to a “restricted class,” which includes employees and family of employees that are “administrative and executive personnel,” which consists of employees who **both**:

- 1) Are paid on a salary (rather than hourly)
- 2) Have policymaking, managerial, professional or supervisory responsibilities

These employees will generally include those who either:

- Devote the majority of their work week to duties running the corporation’s business (i.e., officers, executives; or plant, division, or section managers)
- Follow the recognized professions (i.e., in-house lawyers)

Stockholders (i.e., those who have a vested beneficial interest in the stock, the power to direct how the stock will be voted, and the right to receive dividends) and their families also fall under this restricted class.

## Not included in this class are:

- Professional employees represented by labor unions
- Outside counsel, consultants or professionals
- Board members who receive no compensation
- Salaried foremen and others who supervise employees
- Former or retired personnel

Members of the general public cannot be solicited.

## QUESTIONS YOU MAY RECEIVE

**Q: Can I choose which candidates or Members of Congress my money goes to?**

**A:** Though we do not take direct requests, or earmark funds, you can rest assured knowing we put our financial support behind candidates and Members of Congress who demonstrate a pro-insurance approach to law-making. Additionally, The Council’s government affairs team works closely with our member firms to complement their own political efforts.

**Q: What percentage of my contribution actually goes to candidates?**

**A:** 100% of the dollars given to CouncilPAC go directly to candidates. Federal law allows The Council to pay all of the PAC’s administrative costs.

**Q: I already give to charities and foundations – why should I give to a PAC? How does it affect me?**

**A:** Giving to a PAC is consistent with your engagement with charities and foundations. You’ve demonstrated that you’re an educated citizen who believes in making a difference by getting involved. CouncilPAC is an extension of your current efforts. Your contributions help legislators who help our industry and, in turn, your clients.

**Q: Is my participation confidential?**

**A:** The Council is required to collect and report to the Federal Election Commission in Washington, D.C., the name, mailing address, occupation, and name of employer for individuals whose contributions exceed \$200 per calendar year.

# Legal Info

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## CONTRIBUTION LIMITATIONS

**Q: What is the minimum and maximum amount an individual can contribute to CouncilPAC in a single calendar year?**

**A:** An individual can contribute ANY amount up to \$5,000 per calendar year. Firm leadership may recommend levels of giving based on organizational goals, but these are merely suggestions, contributions are voluntary, and you have a right to refuse to contribute without reprisal.

**Q: What contributions are prohibited?**

**A:** Contributions from federal government contractors, foreign nationals, and corporate or labor general treasuries are prohibited. Additionally, contributions in the name of another person are prohibited.

**Q: Can I use my company credit card or be reimbursed by my firm for a contribution to CouncilPAC?**

**A:** No. Contributions to CouncilPAC are personal and cannot be reimbursed.

**Q: Is my contribution to CouncilPAC tax deductible?**

**A:** No. Political contributions to PACs as well as to political parties or candidates are not tax deductible.

**Q: My company has its own federal PAC. Can I still contribute to CouncilPAC?**

**A:** Yes. Even if your company has a federally registered PAC, you can still contribute up to the maximum amount to CouncilPAC.

**Q: What disclaimers need to be on a solicitation?**

**A:** The Federal Election Commission requires various disclaimers on solicitations based on the requirements under federal campaign finance law. Examples are included in the sample solicitations located in this toolkit. Below is an outline of what should be included.

**General Notices:**

- Contributions to the Council of Insurance Agents & Brokers PAC will be used to support candidates in federal election campaigns.
- These contributions are strictly voluntary and you have a right to refuse to contribute without reprisal.
- You must be a U.S. Citizen or a Permanent Resident (i.e., a Green Card holder residing in the U.S.).

**If there are suggested contribution levels:**

- Any guidelines which may be suggested are only suggestions. All are free to contribute more or less than the guidelines, and no one will be favored or disadvantaged in their membership or employment because of the amount of their contribution or their decision not to contribute.

**What must be included on any contribution card or form that would accompany a letter:**

- All contributions must be from personal funds and may not be reimbursed or paid by any other person or entity. Contributions from foreign nationals are prohibited. Contributions from federal contractors, and the treasury funds of corporations, labor unions and national banks are prohibited.
- Federal law requires political committees to use their best efforts to obtain and report to the Federal Election Commission the name, mailing address, occupation, and name of employer for each individual whose contributions aggregate in excess of \$200 in a calendar year.
- Contributions or gifts to the Council of Insurance Agents & Brokers PAC are not tax deductible.

*Ready to roll up your sleeves?*

COUNCIL PAC