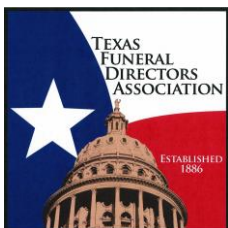


Texas Funeral Directors Association

PAC Committee

2019

# Committee Member Toolkit



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## Contents

- TFDA PAC: The Backbone of TFDA Political Involvement ..... 2
- Not Every TFDA PAC Investment is the Same ..... 3
  - Hard Dollars vs. Soft Dollars..... 3
  - Corporate Ally Program (Soft Dollars) ..... 3
- Fundraising Targets..... 4
  - Every Member..... 4
  - Major Investors ..... 4
  - Corporate Ally Program ..... 4
- Preparing Your Volunteers to be TFDA PAC Fundraisers ..... 4
  - Why Invest? ..... 4
  - Educating Members about Investing in RPAC..... 5
  - Common TFDA PAC Myths..... 5
    - Myth #1: TFDA PAC is partisan..... 5
    - Myth #2: I don’t need to contribute because my dues dollars already pay to lobby our issues..... 5
    - Myth #3: My TFDA PAC investment is only important in election years. .... 6
    - Myth #4: I don’t have any say in where my TFDA PAC investment goes. .... 6
    - Myth #5: TFDA buys votes, adding to my distrust of politics. .... 6
  - Handling Objections..... 6
- Creating and Implementing a Fundraising Plan ..... 8
  - The Fundraising Goal-Setting Process..... 8
  - Fundraising Methods and Recognition ..... 8
    - Events..... 8
    - Recognition and Awards ..... 8
- Do’s and Don’ts: Delivering TFDA PAC Checks..... 9
  - Do..... 9
  - Don’t ..... 9

## TFDA PAC: The Backbone of TFDA Political Involvement

The Texas Funeral Directors Association and TFDA PAC work together to promote strong candidates and common-sense regulation. In fact, TFDA PAC is the backbone that supports all our political involvement efforts. Since its inception, TFDA PAC has consistently promoted the election of candidates that understand the importance of the funeral service profession.

Candidates who receive support from TFDA PAC are not selected based on their political party or ideology, but solely on their support of TFDA issues.

Through TFDA PAC, TFDA members raise and spend money to elect candidates who understand and support their interests. The funds to accomplish this come from voluntary investments made by TFDA members. Members freely make these investments because they know it's a wise investment in the future of their profession.

In short, TFDA PAC enables TFDA members to support candidates who support the issues that matter to them.

This guide provides an overview of the ways TFDA PAC and the Texas Funeral Directors Association fund their extensive political advocacy efforts.

## Not Every TFDA PAC Investment is the Same

### Hard Dollars vs. Soft Dollars

TFDA PAC investments are divided into two categories – hard money and soft money. And no, we’re not talking about bills versus coins here.

Rather, hard money refers to voluntary investments from individual TFDA members. TFDA PAC investments must be made with a personal check or credit card paid with personal funds and CANNOT be made with a corporate credit card or check. These are the only funds that can be legally used to support state-level candidates.

Soft money, on the other hand, is money invested by organizations or corporations. Soft dollars may be used for issue advocacy, polling, independent expenditures and certain types of political events.

Simply put, hard money is the only type of funds that can be used for direct contributions to state candidates. Soft money is not regulated in the same way and cannot be used for direct candidate contributions but can be accepted by TFDA and used in other ways to support candidates and issue campaigns.

### Corporate Ally Program (Soft Dollars)

As important as candidate fundraising (hard dollars) is, it is important to have a solid infrastructure in place to help raise those dollars. Corporate or organizational dollars (soft dollars) can be used for polling, fundraising events, voter registration drives, candidate “Meet & Greet” events, independent expenditures and other non-direct candidate spending.

The TFDA Corporate Ally Program provides a set of tools to recruit and reward corporate partners that understand the importance of political involvement. Those who invest in CAP receive specific benefits and accolades depending upon the level of support. These investments count toward annual fundraising goals and Major Investor receipts.

## Fundraising Targets

### Every Member

While it's true that TFDA PAC does great work supporting TFDA candidates, **fewer than 1 in 5 members invest**. We can do better than that. The most effective way to strengthen TFDA PAC is to get more of our members – funeral directors, embalmers, vendors – to step up to the plate, even with a small investment.

The TFDA PAC Committee is charged with growing the number of investors every year. There are a number of fundraising tools available through the TLADS (TFDA Legislative Activity Digital Sign-on) system to help grow TFDA PAC participation rates. Also, more information about this can be found in the “Creating and Implementing a Fundraising Plan” on page **XX** of this document.

### Major Investors

With a minimum investment of \$500 per year, members become part of TFDA's Major Investor Program. Members of the Major Investor Program are recognized with specific benefits and accolades that acknowledge their support of TFDA PAC.

Potential Major Investors are members that are already politically or civically involved. These are the type of members that can be counted on to invest more dollars more often.

### Corporate Ally Program

As mentioned on page 3, the TFDA Corporate Ally Program (CAP) targets firms, mortuaries, transport services, suppliers and manufacturers.

Potential CAP candidates are likely very active in other areas of the association. They understand that an industry that shies away from politics is an industry whose future is unstable and uncertain.

## Preparing Your Volunteers to be TFDA PAC Fundraisers

### Why Invest?

The simple reality is that decisions made by elected officials impact the business of our members and the families they serve. That makes it critical to elect candidates who understand the importance of balancing proper regulation and oversight while allowing funeral service professionals to offer the best care to families.

TFDA and TFDA PAC work hand-in-hand to fight public policies that hurt the funeral service profession and to support those that enhance it. TFDA PAC is not a charity. It's a smart investment in the future of each and every funeral service professional.

From CE requirements and cemetery regulations to tax policy and insurance rules, every funeral service professional should have their professional voice heard and TFDA PAC is your voice. We speak loudest together.

*Remember: If you're not at the table, you're probably on the menu.*

### Educating Members about Investing in TFDA PAC

Before “The Ask” can happen, it’s imperative to educate potential TFDA PAC investors. Actually, education is as important as solicitation itself. Members need to understand how TFDA PAC impacts their bottom line before they invest.

The TFDA PAC educational effort, particularly at the chapter level, should be year-round and ongoing and can be carried out in a number of ways.

The chapter association TFDA PAC educational effort might consist of one or more of the following:

- Hosting a new member orientation reception
- Conducting a chapter association TFDA PAC seminar, using state association staff and/or Legislative Committee members
- Giving a TFDA PAC presentation or speech at chapter association meetings
- Speaking to funeral directors during office meetings
- Publishing articles about TFDA PAC in chapter newsletters (TFDA can provide)
- Sending a direct mail letter (staff can provide) about TFDA PAC to every member; and/or
- Making TFDA PAC material available at all local chapter functions – be sure to include details about legislative, administrative and regulatory successes that TFDA PAC activity helped achieve

### Common TFDA PAC Myths

Investing in TFDA PAC doesn’t have to be complicated, but there are doubters among us. It is not that they don’t care. They just need enlightenment. They may have bought into some of the myths that surround TFDA PAC as a reason not to invest.

So, let’s take a few steps toward enlightenment by correcting some of the myths about TFDA PAC.

**Myth #1:** TFDA PAC is partisan.

**Reality:** TFDA PAC selects candidates who share our philosophy and who will listen to the TFDA viewpoint. Political affiliation is not considered. In election cycle after election cycle, TFDA PAC contributions are split between Republican and Democratic candidates.

**Myth #2:** I don’t need to contribute because my dues dollars already pay to lobby our issues.

**Reality:** State election law requires that direct contributions to state candidates be made with “hard” dollars, or personal contributions. TFDA cannot use dues dollars for these direct contributions. And candidates who become office holders are the ones who decide issues.

Myth #3: My TFDA PAC investment is only important in election years.

Reality: Candidates need to begin fundraising in the off year leading up to the election so they are properly prepared when their election year comes around. Your TFDA PAC investments are especially critical as we work to prevent damaging legislation and burdensome regulation.

Myth #4: I don't have any say in where my TFDA PAC investment goes.

Reality: TFDA PAC is a bottom-up organization. Your PAC and Legislative Committees work with staff to determine which candidates will be supported.

Support is based on these recommendations, the candidate's voting record and other measurements of support for TFDA issues.

Myth #5: TFDA buys votes, adding to my distrust of politics.

Reality: TFDA PAC does not buy votes. PERIOD.

We want to be sure our elected officials fully understand the importance of TFDA issues. TFDA PAC gives us a foot in the door by allowing TFDA members to support the candidates that support them. Through fundraising efforts, TFDA members can establish relationships and present our issues to lawmakers in a more casual environment. However, there is no guarantee they will agree, and in fact no elected official will always agree with us every time.

Remember, TFDA members are not only representing ourselves, we are representing every family we serve. TFDA PAC is one of thousands of Political Action Committees in Texas, BUT it is the only one that exists solely to protect funeral service professionals and the public at large.

## Handling Objections

Once you've dispelled the TFDA PAC myths, you may still run into members who voice reasons for not investing. Below are a few objections you might hear and how to handle them in a one-on-one conversation with a potential investor.

### **I don't believe in giving money to political candidates.**

Actually, rather than "giving" money to political candidates, you are investing in your business and a commitment to preserving the future of our business. You have insurance on your car, home and business. Bad legislation could be just as catastrophic financially as the loss of any of your possessions by fire, theft or storm. TFDA PAC helps elect officials at the state level who understand the importance of funeral service professionals.

**I already contribute to political candidates on my own.**

You should contribute directly to the candidates of your choice, but you also should contribute through TFDA PAC. The dollars you invest are pooled with hundreds of other like-minded investors and help TFDA show its support with one voice.

**I don't have the money.**

Look at it this way. Do you drink coffee? (If not, choose another indulgence like ice cream or pizza or just plain going out to lunch.) Coffee drinkers on average consume 3.1 cups of coffee a day. The average price for brewed coffee is \$2.38 per cup or \$3.45 if you are one of those double shot, no foam, one pump sugar-free vanilla latte-drinking hipsters. Think you can't afford to invest in TFDA PAC? I suggest you eliminate one of those three cups. Take that \$2.38 or \$3.45 and put it in a jar on your desk...or transfer into your savings account instead of your coffee shop debit card. In about a month and a half, you will have saved \$100 that you can invest in TFDA PAC to protect your business.

**I'm a Republican/Democrat and TFDA PAC has supported candidates of the other party.**

TFDA PAC is nonpartisan in its selection of candidates. The voting record and views on the issues that affect TFDA members, in addition to the recommendations of the Legislative Committee, are the deciding factors on who we support.

**I'm not full time, why should I contribute?**

If you benefit at all from the funeral service business, you have a vested interest in ensuring that the individuals who pass the laws that affect our livelihood share our values.



## Creating and Implementing a Fundraising Plan

### The Fundraising Goal-Setting Process

There are two different TFDA PAC fundraising goals set each year. One is set through coordination of the TFDA PAC Committee and Legislative Committee and is the amount necessary to be effective in the state races in which TFDA PAC will engage in the upcoming election cycle. That goal is called the TFDA PAC Effectiveness Goal and it is set on an annual cycle.

The other goal is aspirational and is based on past performance as well as projected growth. That goal, called the TFDA PAC Fundraising Goal should be higher than what was raised the previous year. Both hard and soft dollar investments count toward this goal.

In other words, the TFDA PAC Effectiveness Goal is the minimum needed to be relevant in state races and the TFDA Fundraising Goal is the total amount we aspire to raise.

### Fundraising Methods and Recognition

#### Events

Special events are a great way to build camaraderie, generate enthusiasm and, most importantly, raise money for TFDA PAC. A signature special event may become the highlight of your fundraising program – something to build up to over the course of the year. You may also use an event as a tribute to your Major Investors through selective seating, private receptions or by having a portion of the program in their honor.

TFDA PAC Fundraising Grants are available to help chapters increase their TFDA PAC fundraising receipts and participation. There are varying grant amounts available for different events. Grant amounts, applications and other tools are available online.

Major Investor Fundraising Events help chapters recruit new Major Investors. Chapters can be reimbursed on a per person basis to host these exclusive events. Contact staff for more information.

#### Recognition and Awards

Recognition is really appreciation. It's a way to say thank you to your TFDA PAC investors. In addition, public recognition of your TFDA PAC investors encourages others to invest as well. When members see their colleagues recognized at meetings, through awards, or on special lists of contributors, it may cause them to say to themselves, "Next time, I want to be one of those investors."

TFDA recognizes both individual investors and chapters for their TFDA PAC fundraising efforts in a number of ways. Major Investors as well as investors at other levels are and should be recognized regularly for their investment in their profession.

## Do's and Don'ts: Delivering TFDA PAC Checks

TFDA PAC serves as a critical resource to support funeral service champions in their election efforts. The following is a reminder of the importance of delivering your TFDA PAC checks and the rules surrounding that activity. ***Do not put yourself at risk or embarrass the lawmaker or his/her staff by forgetting these important guidelines. The difference between correct or incorrect is a LEGAL DISTINCTION.***

### Do

- Deliver your TFDA PAC check in-person.
- Meet your legislator at a non-government location like a coffee shop, your office, or their campaign headquarters. **NEVER** deliver a check at his/her office or on any other government property.
- Deliver the TFDA PAC check with 15 days of receiving it from TFDA.
- Contact TFDA if you cannot deliver the check to the candidate, so another TFDA representative may be appointed to deliver it.
- Praise the legislator for his/her work in the district and for supportive actions he or she has already taken to further funeral service issues.
- It is important to only comment on action they have taken **IN THE PAST** and not on any legislation currently being considered.
  - Even better is to avoid discussing specific legislation at all while presenting a check.
- Keep close track of all TFDA PAC checks. If for some reason the check is lost, please report it to TFDA Staff **IMMEDIATELY** so that it can be canceled and re-cut.

### Don't

- **NEVER** deliver a TFDA PAC check in a government office OR on government property. It is **ILLEGAL!** This includes everything from state office buildings to state parks or any other state facilities.
- Note: Even presenting the check in the parking lot can still be considered government property and may be unlawful. **DO NOT DO IT.**
- Never make any political "ask" of your legislator while presenting your TFDA PAC check.
  - For example, DO NOT say "Please vote for this bill." Again, it is ILLEGAL to solicit a legislative vote in exchange for a contribution.
- Don't delay delivering your TFDA PAC check. If the check is not cashed within 60 days, the check will be voided and you will need to request a replacement check from TFDA.
- Don't deliver a TFDA PAC check after the election-day (primary or general) for which the check is designated. After Election Day, TFDA may no longer contribute to a candidate and we miss the opportunity to demonstrate our support.
- Don't mail a check unless it is absolutely unavoidable. Please deliver all checks in-person if possible.