



NARFE-PAC Toolkit *for PAC Leaders*

In this toolkit, you will...

Learn the roles and responsibilities of federation NARFE-PAC coordinators and chapter NARFE-PAC chairs, including how to solicit contributions, facilitate candidate recommendations and educate NARFE members about NARFE-PAC.



National Active and Retired Federal Employees Association



Roles and Responsibilities of a NARFE-PAC Leader

NARFE-PAC leaders play a crucial role in the success of NARFE-PAC, the Association's political action committee. Federation NARFE-PAC coordinators lead the federation's PAC program, while chapter NARFE-PAC chairs assist and solicit contributions at the chapter level. Outlined below are the roles and responsibilities of these positions.

1. Educate leaders and members on the importance of NARFE-PAC. NARFE-PAC coordinators and chairs are responsible for raising awareness of NARFE-PAC and the important role it plays in fulfilling NARFE's mission.

Learn more: [NARFE Frequently Asked Questions](#)

2. Encourage and solicit members' contributions to NARFE-PAC. NARFE-PAC coordinators and chairs should raise NARFE-PAC funds at all chapter and federation events.

Learn more: [Raising NARFE-PAC Funds](#) and [Top Five Reasons to Contribute](#)

3. Provide state recommendations for contributing NARFE-PAC funds to candidates in their respective states and help organize local events. Federation NARFE-PAC coordinators, in consultation with the affected chapter PAC chairs and NARFE members, provide Headquarters with a yes or no recommendation for making NARFE-PAC contributions to candidates for Congress. These recommendations are considered when making final decisions for NARFE-PAC contributions. Federation NARFE-PAC coordinators also work with Headquarters to identify local NARFE members to attend in-district fundraisers.

Learn more: [The NARFE-PAC Consultative Process](#) and [Attending Local Fundraisers](#)

4. Share contribution and disbursement information with members. NARFE sends federation PAC coordinators and chapter PAC chairs quarterly PAC reports that detail NARFE-PAC contributions from NARFE members (by chapter, state and region) and NARFE-PAC disbursements made to congressional candidates. NARFE-PAC coordinators also receive timely emails with scanned copy of checks that were sent to candidates in his/her state. The federation PAC coordinator, with the help of chapter NARFE-PAC chairs, is responsible for sharing this information with members.

Learn more: [NARFE-PAC Reporting](#) and [NARFE-PAC Contribution and Disbursement Reports](#)



Raising NARFE-PAC Funds

NARFE-PAC leaders help raise NARFE-PAC funds in order to grow NARFE's political influence. Outlined below are the steps federation NARFE-PAC coordinators and chapter NARFE-PAC chairs should take to communicate the importance of giving and soliciting contributions.

Overview

Chapter- and federation-level fundraising efforts are essential to NARFE-PAC's success.

Federal law requires NARFE-PAC be funded solely through NARFE members' generous, voluntary contributions specifically for political purposes. This means no other monies of the Association (membership dues, etc.) fund NARFE-PAC. In addition to federation and chapter fundraising, Headquarters solicits NARFE-PAC contributions via *narfe* magazine, email and direct mail.

Soliciting Contributions at Chapter and Federation Events

In order to help NARFE-PAC raise \$1.5 million in the 2017-2018 election cycle, NARFE-PAC leaders should solicit contributions at all chapter and federation events.

At chapter meetings: Briefly mention NARFE-PAC and explain its importance. Solicit and collect contributions (use [Top Five Reasons to Contribute](#) to encourage contributions). At federation and region conventions: Highlight NARFE-PAC and explain its importance. Set up a PAC table and collect contributions. Know which members of Congress in the state received contributions.

NARFE-PAC leaders should focus even more on NARFE-PAC during March, which is NARFE-PAC month.

NOTE: NARFE members who would like to contribute at home can do so via the *narfe* magazine or [online](#).

Solicitation rules to keep in mind:

- Only NARFE members and their families may be asked to give to NARFE-PAC.
- When requesting PAC contributions, make it clear that they are voluntary. Coercion or undue persuasion cannot be used when requesting contributions.
- According to the Internal Revenue Code, a statement must be made that PAC contributions are not tax-deductible.
- NARFE-PAC does not recommend holding bake sales or raffles to raise money as the regulations governing these transactions are complex and vary by state.



NARFE-PAC Giving Levels and Incentives

NARFE members can make two types of NARFE-PAC contributions: a one-time contribution or a monthly credit card contribution as part of the NARFE-PAC Sustainer program. Both of these options are explained below.

One-time Contributions

NARFE members can make a one-time cash, check or credit card contribution in any amount they'd like. NARFE-PAC recognizes one-time contributors in four giving levels, starting at \$25. Members giving at these levels, which are cumulative over the 2017-2018 election cycle, receive the corresponding lapel pin and incentive, as detailed below.

- **Basic \$25 - \$49:** basic NARFE-PAC lapel pin.
- **Bronze \$50 - \$99:** bronze NARFE-PAC lapel pin.
- **Silver \$100 - \$249:** silver NARFE-PAC lapel pin.
- **Gold \$250 or more:** gold NARFE-PAC lapel pin and a NARFE fleece blanket.

Monthly Sustainer Contributions

NARFE members can also sign up as a NARFE-PAC Sustainer and make automatic monthly credit card contributions. All monthly contributions must be at least \$10. Sustainers receive the incentives detailed below.

- **Sustainer:** sustainer lapel pin and a NARFE fleece blanket.

NARFE-PAC Sustainers are crucial to strengthening NARFE's political influence. They reduce fundraising costs and continually grow NARFE-PAC each month, allowing NARFE-PAC to contribute more money to candidates.

NARFE-PAC Sustainers are continually charged via credit card until they ask Headquarters to be removed from the program. Members whose credit cards are not able to be processed will be contacted to update their information via email, physical mail or phone call. If the contributor does not update their information, they will be removed from the Sustainer program.



Collecting Contributions and Sending them to Headquarters

Collecting Funds

NARFE-PAC contributions collected at an event can be in the form of cash, check or credit card.

For cash and check contributions: Record contributions on the [NARFE-PAC Collections Form](#). For each contributor, list their membership ID (chapter number if membership ID is unknown), name, amount of contribution and whether they need a pin/bag sent from Headquarters. Write NO in the last column if a pin was given to the contributor at the time of the contribution or if they would not like one sent.

For credit card contributions (including those signing up to be a NARFE-PAC sustainer): Each contributor should fill out their own [NARFE-PAC Contribution Form](#) or [NARFE-PAC Brochure](#). If a contributor has already received a pin or would not like to receive one, mark the “Please do not send any gifts for my contribution.” box.

Sending Funds to Headquarters

Contributions must be forwarded to Headquarters within 30 days of collection.

Send contributions, along with a completed [NARFE-PAC Collections Form](#) (for cash and check contributions) and any [NARFE-PAC Contribution Forms](#) or [NARFE-PAC Brochures](#) (for credit card contributions) to:

NARFE
Attn: Budget & Finance
606 North Washington St.
Alexandria, VA 22314

NOTE: Federal law prohibits cash and check contributions from being consolidated and sent to NARFE Headquarters **in the form of a chapter or federation account check**. Instead, funds should be sent via a cashier’s check, money order or personal check.



Obtaining NARFE-PAC Materials

Federation and chapter PAC leaders should request NARFE-PAC materials from NARFE's legislative staff to aid in soliciting contributions at chapter and federation meetings.

The materials include:

- Basic NARFE-PAC pins
- [NARFE-PAC Collections Forms](#): Used to list cash and check contributions raised at a federation or chapter event. In the last column, mark whether a pin needs to be sent to contributor or if one was already given.
- [NARFE-PAC Contribution Forms](#): Used to make a credit card contribution at a federation or chapter event. Features the incentives and giving levels.
- [NARFE-PAC Brochures](#): Used to encourage members to make a contribution on their own. Features five reasons to give, the incentives and giving levels. Should be distributed to members at federation or chapter events.

To request PAC materials, send an email to leg@narfe.org or call (703) 838-7760 extension 201.



The NARFE-PAC Consultative Process

Headquarters follows a consultative process prior to making PAC contributions to candidates. Federation NARFE-PAC coordinators are asked to provide a recommendation on the candidate, after discussion with affected chapter NARFE-PAC chairs and members. This process is explained in detail below.

Overview

NARFE-PAC seeks recommendations from federation NARFE-PAC coordinators prior to contributing NARFE-PAC funds to congressional candidates. The NARFE-PAC Board considers this recommendation, among other factors, when making final decisions for allocating NARFE-PAC funds.

The Recommendation Process

NARFE's Legislative Department will email the federation NARFE-PAC coordinator and the federation president requesting a recommendation regarding a candidate being considered for NARFE-PAC contributions. For this reason, federation NARFE-PAC coordinators must have and regularly check a working email account.

NOTE: If the federation NARFE-PAC coordinator role is vacant, the federation president is responsible for providing a recommendation.

Next, the federation NARFE-PAC coordinator should consult with chapter PAC chairs, CDLs and NARFE members in the relevant congressional district (or entire state, for Senate candidates) to determine the federation recommendation.

This recommendation should be based on the candidate's interactions with NARFE and his or her stance on NARFE issues. This includes evaluating the candidate's working relationship at the local level and NARFE voting record. Personal political views regarding issues not relevant to NARFE's mission will not be given any weight.

Within two weeks, the federation NARFE-PAC coordinator is expected to respond to the email request with a recommendation regarding the candidate. Recommendations must be received in writing via email.

NOTE: Because of this short timeline, NARFE encourages federation NARFE-PAC coordinators to frequently poll NARFE members and chapter NARFE-PAC chairs of their respective members of Congress and congressional candidates.

The Legislative Department then provides these recommendations to the NARFE-PAC Board.



Final Decisions

The final decision concerning NARFE-PAC contributions rests with the NARFE-PAC Board. The NARFE-PAC Board is made up of the two elected National Officers and the Legislative Director.

It is the responsibility of the NARFE-PAC Board to take into consideration its overall budget and NARFE's national political strategy — in addition to the recommendations of local NARFE members.

Factors Considered

A number of factors are considered by the NARFE-PAC Board when deciding whether to contribute to a particular candidate, including, but not limited to:

- The candidate's support on NARFE issues. This is indicated primarily by his or her NARFE voting record. Challengers or open-seat candidates who do not have a NARFE voting record are asked to fill out a [Candidate Questionnaire](#). Statements on NARFE issues, bill cosponsorships and personal meetings are also used to determine support.
- The federation recommendation, which should include an evaluation of the amount and quality of communication and accessibility of the candidate for NARFE members, chapters and federation.
- The influence a legislator can exert in support of NARFE's goals, whether it is through a party leadership position, committee assignment or a particular area of expertise.
- The competitiveness of the candidate's race.
- The overall NARFE-PAC budget.

NOTE: NARFE-PAC makes contributions to federal candidates for Congress only. It does not contribute to presidential candidates.



Attending Local Fundraisers

In addition to NARFE officers and staff attending fundraisers in D.C., NARFE members can attend in-district fundraisers. Federation NARFE-PAC coordinators work with NARFE's legislative staff to organize this process, which is explained in detail below.

Overview

An important component of NARFE-PAC is sending NARFE members to in-district fundraisers. This helps establish and strengthen relationships between NARFE members and congressional candidates. It also helps NARFE members take a more active role in NARFE-PAC, which they fund. In the 2017-2018 cycle, NARFE-PAC has a goal to send members to at least 100 local fundraisers.

Federation NARFE-PAC coordinators work closely with NARFE's legislative staff to get approval for local events, and make sure the NARFE members attending are prepared to appropriately represent NARFE-PAC.

Getting Approval to Attend an Event

NARFE members interested in attending a local fundraiser in connection with a NARFE-PAC contribution **must** receive written approval from NARFE Headquarters prior to RSVP'ing and attending any event.

Members interested in attending an event should forward the invitation to the federation NARFE-PAC coordinator, who should then forward it to NARFE's legislative staff. Federation NARFE-PAC coordinators are also encouraged to send invitation requests to NARFE's legislative staff if they hear of a local event. The staff consults with the NARFE-PAC Board, following the typical [NARFE-PAC Consultative Process](#) and approves or disapproves attending the event.

If the NARFE-PAC Board agrees to make a NARFE-PAC contribution in connection with an in-district event, the federation NARFE-PAC coordinator is responsible for determining which NARFE members attend. Depending on the event and the size of the contribution, multiple NARFE members may be able to attend. Any NARFE member is eligible to attend, including federation NARFE-PAC coordinators and chapter NARFE-PAC chairs.

The federation NARFE-PAC coordinator works with NARFE's legislative staff to RSVP to the event. The NARFE-PAC check will be sent to the campaign from Headquarters. It will **not** be sent to the NARFE member to bring to the event.



Before an Event

NARFE members who receive approval to attend an event should adequately prepare to represent NARFE-PAC at the fundraiser. NARFE's legislative staff can provide NARFE talking points, which may include timely issues to mention to the candidate or to thank them for recent support.

Attending an Event

At the event, NARFE members should look for opportunities to introduce themselves to the candidate and briefly discuss NARFE and the talking points they have prepared. Recognize that the quality and quantity of candidate engagement may depend on the format of the event.

NARFE-PAC encourages NARFE members to properly represent NARFE-PAC by being friendly, polite and respectful.

At fundraisers, it *is* legal to talk about the election campaign. However, NARFE-PAC contributions are not and may not be given in exchange for official acts or promises of official acts by the candidate. Money is not given in exchange for votes, cosponsoring bills or any other official act. Also, while NARFE-PAC contributes to candidate's campaign, NARFE-PAC does not formally endorse candidates.

REMINDER: Never discuss NARFE-PAC contributions or campaigns with legislators or congressional staff while they are at their congressional offices or in government-owned buildings as they are conducting official government duties.

After an Event

NARFE members who attend local events should share a summary of the event and their interactions with the congressional candidate with the federation NARFE-PAC coordinator and NARFE's legislative staff.

Individuals should also share this information amongst their federation and chapter. This helps increase understanding of how NARFE-PAC operates and reduces misinformation surrounding NARFE-PAC.



NARFE-PAC Reporting

Federation NARFE-PAC coordinators and chapter NARFE-PAC chairs receive timely information regarding NARFE-PAC contributions from NARFE members and disbursements to congressional candidates. This information should be shared with NARFE members. The reporting process is explained in detail below.

Overview

NARFE-PAC reports general PAC information and contribution and disbursement data to NARFE-PAC leaders on a regular basis, including through monthly PAC emails, which includes the quarterly NARFE-PAC contribution and disbursement report, and NARFE-PAC check emails.

Being transparent and sharing this information with NARFE members is an important role of federation NARFE-PAC coordinators and chapter NARFE-PAC chairs. This creates a greater understanding of how NARFE-PAC operates and reduces misinformation surrounding NARFE-PAC.

Quarterly Contribution and Disbursement Reports

Monthly PAC emails are sent to Federation NARFE-PAC coordinators, federation presidents, chapter NARFE-PAC chairs and the National Executive Board. These emails cover various topics, including general information about NARFE-PAC, changes to the PAC program and solicitation advice.

On a quarterly basis, the monthly email will be the Quarterly NARFE-PAC contribution and disbursement report.

These emails include a status memo on NARFE-PAC and links to the member-protected [NARFE-PAC Contribution and Disbursement Reports](#) section of our website, which includes all NARFE-PAC contribution and disbursement data. Specifically, the page includes the most up to date:

- **Quarterly Contribution Reports (A250 chapter report):** This report breaks down the number of NARFE-PAC contributors (including a column for sustainers) and the total amount contributed **by chapter**.
- **Contributions by State:** This report breaks down the number of NARFE-PAC contributors (including a column for sustainers), the total amount contributed and the average (mean) total contribution per contributor, **by state**.



- **Contributions by Region:** This report breaks down the number of NARFE-PAC contributors (including a column for sustainers), the total amount contributed and the average (mean) total contribution per contributor, **by region**.
- **Quarterly Disbursement Reports:** This report breaks down the candidates that have received NARFE-PAC funds, by state.

NOTE: These reports are cumulative for the two-year election cycle (2017-2018). Additionally, all NARFE members can access this information at any time in the [NARFE-PAC Contribution and Disbursement Reports](#) section of our website.

Notification of PAC Contributions

Federation NARFE-PAC coordinators and federation presidents receive an email when a NARFE-PAC contribution is made to a candidate in their state. This email, which is sent within a week of the check being mailed, includes a scanned copy of the check.

Sharing this Information

Informing NARFE members of NARFE-PAC's activity helps increase understanding of NARFE-PAC and its importance to NARFE's advocacy goals.

Federation NARFE-PAC coordinators and chapter PAC chairs should keep NARFE members informed about NARFE-PAC activities, including relevant information in the monthly NARFE-PAC emails. Specifically, members should be told how much the federation or chapter contributes to NARFE-PAC (and compared to other federations or chapters) and when a contribution is made to a candidate within the scope of the federation or chapter. This information can be shared at federation and chapter meetings and in newsletters.



NARFE-PAC Leaders FAQs

Below are some frequently asked questions NARFE-PAC leaders ask regarding NARFE-PAC. If you have additional NARFE-PAC questions, please contact the Legislative Department at leg@narfe.org or (703) 838-7760.

If a candidate calls or emails a NARFE-PAC leader and asks for NARFE-PAC funds, what should they say?

The NARFE-PAC leader should explain how the [consultative process](#) works and forward the request (via email) to NARFE's Legislative Department to begin the consultative process.

If a NARFE member attends a local fundraiser on behalf of NARFE-PAC, will Headquarters send them the NARFE-PAC check to present to the member of Congress or candidate?

No. Once authorized, the NARFE Budget and Finance Department issues the NARFE-PAC checks, which are then sent directly to the candidate's campaign.

If a NARFE-PAC contributor does not receive their incentive, what should they do?

The contributor, or a NARFE-PAC leader, should contact the Legislative Department to alert them of this issue so they can fix the problem.

Does NARFE-PAC seek to contribute to a candidate in every congressional race?

No. It is not the goal of NARFE-PAC to contribute campaign funds to one or the other candidate in every congressional district or state. The decision process for campaign contributions does not consider the number of legislators in the state who have or have not received PAC funds.

Does every fundraising invitation received by the Legislative Department trigger the consultative process?

No. The Legislative Department receives thousands of fundraising email invitations each year from candidates seeking PAC contributions. These do not trigger the consultative process.

Can a NARFE-PAC leader proactively suggest a candidate they believe should receive NARFE-PAC funds?

Yes. NARFE-PAC leaders who wish to suggest a candidate to Headquarters should contact the Legislative Department.



Is NARFE-PAC limited to making disbursements to congressional candidates from a particular state based on the dollar amount of NARFE-PAC contributions received from NARFE members in that state?

No. NARFE-PAC is a national PAC and is not designed to have parity between the amount of money received from NARFE members in a state and NARFE-PAC disbursements made to candidates in that state. NARFE-PAC pools the voluntary contributions from NARFE members throughout the country to use the money where it can make the greatest impact.

Does NARFE-PAC report contributions raised from NARFE members and NARFE-PAC funds disbursed to candidates?

Yes. All members can access this information on the [NARFE website](#). Contribution reports are broken down by chapter, federation and region. This information is updated quarterly.

Does NARFE-PAC release the names of individual NARFE-PAC contributors?

No.