

Best Practices: Political Fundraising

Holding a political fundraiser is easier than you think, here are some best practices for holding a political fundraiser.

1) **DECIDE WHAT FUND.**

- Wisbankpac: funds are pooled, but public
- ABW Conduit: a personal political account is set up that is controlled by the individual
- WBA Issue Advocacy: funds used to help define banking/business issues with the public

2) **HOW SHOULD WE CHOOSE WHAT FUND?**

- Wisbankpac: When you want to count the funds toward the WBA Gold Triangle, but don't want anyone contacting you after you've made the contribution. Set it. Forget it.
- ABW Conduit: When you want to count the funds toward the WBA Gold Triangle, and individuals (and the bank) want to be acknowledged for the donation to a specific candidate or candidates.
- WBA Issue Advocacy: When you want to help, but don't want anyone's name showing up anywhere or being placed on any list, ever. OR When you want to contribute corporate funds.

3) **WHAT NEXT?**

Decide how to raise the funds. This is best decided by a small group (3) of bank employees, based on the culture of the bank. Contact WBA if you want/need materials for any of these events.

IDEAS:

- If bank employees like to cook, have a bake sale or cook off.
- If you like to wear comfortable clothes, sell jeans day stickers.
- Go to the movies as a group during the late afternoon.
- Go bowling.
- Have a bean-bag-toss tournament with traveling trophy (entry fee goes to the fund).
- Auction for lunch (fishing, bowling, skiing, etc.) with the boss – the boss pays.
- Ask the Board to match what the employees give.
- Coin drive.
- Cutest pet contest.
- If you have big ideas, like a golf outing – please call Mike for details.

4) **FOLLOW THE RULES (call John Cronin at 608-441-1215 with questions).**

The rules are pretty simple. WBA does not support any particular political party. We're not "D" nor "R", we're "B" for "Banker!"

For Wisbankpac and ABW conduit, only personal funds allowed – for everything. If you want to spend money to make money, that's a good idea, but Wisbankpac has to bear the cost of the expenses. All we ask is that you call us in advance to coordinate. No contribution is deductible on your taxes. Sorry about that – nothing we can do.

* Federal Elections Commission allows a bank to solicit for only one Federal PAC.

Best Practices: Grassroots

It's important to contact your elected officials via phone or email. Really. Before you ask anyone (bank employee or director) to call or send an email (or letter), make sure that bank management is ok contacting elected officials – it's not a big deal to contact a civic leader.

3 Options:

1) SEND AN EMAIL.

WBA only asks that members send emails about twice a year. Go to www.wisbank.com. Click on the "Advocacy" tab. Then click on the yellow "Take Action Now" button on the bottom of the page. Chances are, WBA will send you an email with a specific link. PRO-TIP: Make sure your IT Department has given the green light to Cision and Vocus software websites.

2) WRITE A LETTER AND SEND IT SNAIL MAIL.

This works well! Hand write something to really get attention. Addresses are listed earlier in the toolkit..

3) CALL.

They won't argue. The person on the phone will ask your name and home address (to make sure you're a constituent). State your position on a bill (get the bill number in advance), be polite and brief. Numbers are listed earlier in the toolkit.

Best Practices: Take Your Legislator to Work (TYLTW)

The secret to a "TYLTW" is that it's just a meeting to talk with an elected official about three things:

1) TO GET TO KNOW YOUR LEGISLATOR.

2) WHAT'S GOING ON IN YOUR MARKETPLACE FROM YOUR PERSPECTIVE.

3) HERE ARE STATE/FEDERAL ISSUES THAT WE'D LIKE YOU TO SUPPORT OR OPPOSE.

You can set up the meeting, or you can ask WBA to set it up. Please contact WBA and ask for the latest agenda/talking points (feel free to modify as you would like). If you want WBA to attend, let us know!

PRO-TIP: Please take a picture and email it to WBA's **John Cronin** at jcronin@wisbank.com.

Best Practices: How to Talk to Your CEO About Advocacy

Gently and infrequently. Unless it's their hobby.

Being involved in the advocacy area is simply another way to show your civic participation and it has an impact on the bottom line of your bank. Talk about it as a natural and quick way to know what's going on as a competitive advantage – a kind of market intelligence. Your peers are involved as well as your competition.

PRO-TIP: Talk about it in terms of your customers and customer segments. If your bank has a lot of agricultural business, then talk to WBA about what's going on with ag legislation, etc.

Best Practices: Communicating with Your Board

Does your board know that the industry (and their investment) faces risk from government/regulatory activity? Of course they do. Being an advocacy officer helps put this risk into context and provides an outlet for information about what you are doing to mitigate that risk. Like joining WBA!

To that end, WBA creates custom advocacy officer Dashboards for your Board of Directors. What does a sample Dashboard contain?

- Key topics and level of intensity
- List of rules/regulations in flux (State and Federal)
- Number of legislative proposals/number being tracked at the state level.
- Peer data: How much does the average bank give to political action funds compared to your bank? How are other banks involved compared to yours?

Best Practices: Managing Expectations of Bank Staff

The single most common comment WBA hears when discussing advocacy items is “I hate politics. Why do we have to hear about this stuff?” We get it. Civic participation and engaging in the creation of public policy usually puts people out of their comfort zone. It's important to acknowledge that from the beginning.

When asking employees to get involved (send an email, give, be aware of issues, etc.) there are two rules:

- 1) Everyone wants to be asked.
- 2) ‘No’ oftentimes mean ‘not now’. Sometimes the timing isn't right and that's OK!

Bank employees will react to the messenger. Is the message coming from the CEO? If not, does the CEO endorse the idea? How your peers react depend on how it's presented and the credibility it's given. It's not the most important thing to your bank, so for heaven's sake, don't treat it that way. But, being involved helps the bank, helps the employee, and it helps the industry. A little goes a long way.