

CalTravel PAC Event Guidelines

We love to have our members host events to benefit the CalTravel PAC! Below are guidelines to make it as easy for you as possible, while ensuring that you and the PAC follows applicable regulation.

Who can host a CalTravel PAC fundraising event?

Anyone! Think about leveraging the events/facilities/connections/assets you have access to. Do you have a VIP suite at a concert venue or sports event? Can you sponsor a local golf tournament or other fund-raising activity? Can you get free tickets or a greatly reduced price at a performance, restaurant, attraction, or activity? Do you have access to a speaker that the tourism community would love to hear speak? Can you offer a truly special experience that isn't available to the general public?

How much is the minimum to raise from a PAC fund-raising event?

Our staff resources are limited, so if we are involved, we need to focus on events that can make at least \$5,000 for the PAC **after** any expenses. And we shoot to spend not more than 50% of the revenue on expense.

What makes a successful PAC fundraising event?

Several factors help ensure success:

- a benefactor who can provide the event at no cost or at a highly reduced cost to the PAC
- an event that can attract a large number of local attendees...or a highly desirable exclusive opportunity at a high price that people are willing to travel to
- a key sponsor who can buy a block of tickets
- an exclusive or private experience, not available for people to get on their own
- at a place and a time that is convenient and easy to get to
- donations or breaks on hotel, transportation, F&B, wine, corkage, etc to make the event price point more enticing for attendees
- an existing successful fund-raising event whose proceeds can be earmarked for the PAC

What are some examples of successful CalTravel PAC events?

- VIP reception and tickets to dress rehearsal of Cirque du Soleil performance

- local golf tournament whose proceeds were earmarked for the PAC
- dinner that included a Celebration of Life for a beloved tourism leader
- private VIP suite at the Rod Stewart concert
- tour and VIP wine-tasting dinner at Chateau Montelena
- dinners tied into board meetings or other events that included local highlights that made the destination and experience memorable

What kind of information do you have to collect from attendees?

You (or CalTravel if it is handling ticket sales) will need to report each attendee donor's name, street address, company, title, and amount contributed. (The ticket price equals the amount contributed.) Also, whether it is a corporate or personal contribution.

If donations were not made directly to the PAC, such as wine for an event, you also need to report an itemized list of the donations showing each donor's name, street address, and the value of the donation.

Expenses also need to be reported-- name, street address and amount for each vendor.

There are three options for paying/reporting expenses—

1. In-kind (non-monetary) contribution from person paying for the expenses.
2. Submit to PAC for reimbursement or payment in advance.
3. Deduct expenses from funds raised, but transmit all receipts/invoices to the PAC along with the name and street address of the person who advanced the expenses.

At the end of this document is a form you can use. CalTravel will work with you to help you make sure that the reporting is complete and correct.

What are the regulations regarding inviting legislators and other public officials to PAC events?

The PAC is permitted to offer every public official 2 free tickets to attend a PAC fundraising event, and the tickets are exempt from the gift rules (not reportable, not subject to the gift limit) and aren't a contribution to the candidate. Tickets offered by a sponsor in excess of 2 are valued according to the benefit received (food, beverage, entertainment, items given out).

What else do you need to be aware of?

Remember, never connect any PAC donation to any policy decision, past or pending – PAC contributions are not rewards or inducements for a public official voting in a particular way. Be aware of timing – do not invite a legislator to an event close in time to an important bill in a committee hearing or floor vote that involves them.

CalTravel and its consultants are here to help you! Please contact Barb Newton, bnewton@caltravel.org, 650-743-9936, with any ideas and we would love to work with you to create a successful event.

Thank you, we truly appreciate the industry's support!

CalTravel PAC Frequently Asked Questions

<p>What purpose do PACs serve in California government?</p>	<p>Elect candidates to public office and support those in office who appreciate the importance of the travel industry in California and are supportive of policies that improve the business conditions of the industry and encourage tourism.</p>
<p>Why is it important for CalTravel to have a strong PAC to be an effective advocate?</p>	<p>Elected officials decide many policy issues that impact the industry: zoning and building codes, permitting, taxes, labor and employment rules.</p>
<p>How can PACs be used?</p> <p>Restrictions?</p>	<p>Direct contributions to state and local candidates and legislators, fundraising events (in-kind/non-monetary contributions) for state and local candidates, contributions to other PACs and political party committees, independent expenditures, travel for PAC staff, board, officers to attend fundraising events.</p> <p>Tax issue: ballot measure advocacy is lobbying and not part of the exempt purpose of Section 527 tax exemption.</p>
<p>How does CalTravel PAC compare to other associations?</p>	<p>It is medium sized. Large PACs are those sponsored by the major unions, dentists, realtors, hospitals, CalChamber. Many smaller PACs raise and spend < \$50,000 per year.</p> <p>State PAC records are public on the Secretary of State's CalAccess website. Private organization also offer different ways of looking at the data – MapLight (SOS Power Search).</p>
<p>What are the regulations regarding inviting legislators and other public officials to PAC events?</p>	<p>The PAC is permitted to offer every public official 2 free tickets to attend a PAC <u>fundraising</u> event, and the tickets are exempt from the gift rules (not reportable, not subject to the gift limit) and aren't a contribution to the candidate. Tickets offered by a sponsor in excess of 2 are valued according to the benefit received (food, beverage, entertainment, items given out).</p>
<p>What do we need to be aware of when communicating about the PAC?</p>	<p><i>Never connect any PAC donation to any policy decision, past or pending – PAC contributions are not rewards or inducements for a public official voting in a particular way.</i></p> <p>Be aware of timing – an important bill in a committee hearing or floor vote and delivery of contributions or fundraising events</p>

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PAC Name	Event Date *Attach an invitation or solicitation for the event.	Amount Enclosed \$
Event Host/Sponsor/Organizer	Contact Person Name, Phone, Email	

<u>EVENT EXPENSES</u>	Total Event Cost	\$
Payment—Select <u>one</u>:		
<input type="checkbox"/> In-Kind (non-monetary) Contribution		
Donor's Name: _____		
Donor's Street Address: _____		
Donor Type:		
<input type="checkbox"/> Organization		
<input type="checkbox"/> Individual		
		Occupation _____
		Employer _____
<input type="checkbox"/> Reimbursement from PAC		
Attach all receipts associated with event. Include each vendor's name, street address, amount paid, and description of goods or services provided.		Payee Name: _____
		Address to _____
		Send payment: _____
<input type="checkbox"/> PAC pays vendor(s) directly		
Attach all receipts/invoices associated with event, including each vendor's name, street address, mailing address if different for remitting payment, amount, and description of goods or services provided.		

<u>FUNDS RAISED (RECEIPTS/CONTRIBUTIONS)</u>	Total Funds Raised	\$
<p>Attach an itemized list of contributors: event sponsors (who paid a contribution to sponsor the event), ticket purchasers, and other donations received for the event (including donation of auction items). Sponsor level or ticket face value is the amount of each contribution. For each donor, list full name (for individuals, list occupation and employer), street address (no PO Box), and amount contributed.</p> <p>For auctions, provide a list of each item up for auction, its fair market value, whether it was purchased for the event or donated (in-kind contribution), and the name and street address of the winner, and the winning bid amount.</p> <p>Raffles are not permissible.</p> <p>Cash may only be accepted up to \$99 per donor (and change may not be given to "buy down" cash under \$100).</p>		