



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 the law.

Who can host a CalTravel PAC fundraising event?

Anyone! Think about leveraging the events, facilities, connections, people, and assets that 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, or attraction? Do you have access to a speaker or performer that the tourism community would love to see? Can you offer a truly special experience that isn't available to the general public?

Because we are in the hospitality business, we have the opportunity to create events at unique places and offer unique experiences. What other industry can offer lunch or cocktails with zoo animals, a behind-the-scenes tour of an attraction, or an intimate reception in an historic building? Be creative! What is interesting and fun for you will be for local tourism leaders and your legislator as well.

Legislators and business leaders attend so many banquets and dinners, it is exciting for them to be able to do something a little out of the ordinary.

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
- cocktail reception in San Francisco with Willie Brown as speaker
- dinners tied into board meetings or other events that included local highlights that made the destination and experience memorable

What are the best times to hold a local event with a legislator attending?

Any time throughout the year is good!

If it is during session (January through mid-September with a summer recess in July, check [here](#) for exact dates), then it needs to be a Thursday evening or Friday or weekend, when the legislator is back in his or her district.

If the event is after session is adjourned, you can hold an event any day of the week that the elected official is back in the district.

As far as time of day, no preference, as it really depends on the event.

What is the ideal number of people in attendance for an event with a legislator?

It depends. Since we are looking to generate at least \$10,000 in revenue before PAC expenses, that is either a minimum of 100 people at \$100, to 20 people at \$500.

In general though, more intimate is better, since it gives attendees and the elected official more time to get to know each other. For that reason, a unique experience that can command a high ticket price is desirable.

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 business 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, company, title, the fair market value of the donation and a description of the item or service.

Expenses also need to be reported -- name, street address and amount for each vendor, and a description of the expense (catering, venue rental fee, etc.).

There are three options for paying/reporting expenses—

1. In-kind (non-monetary) contribution from one or more persons paying for the expenses.
2. Submit to PAC for reimbursement or payment in advance or after the event.
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 other than CalTravel PAC or any tickets provided 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 your support!

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