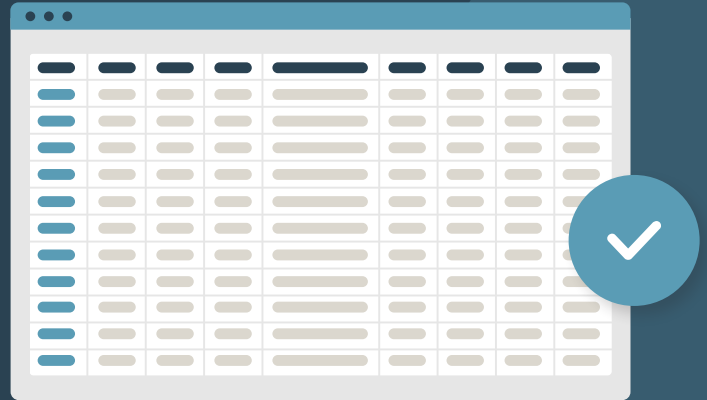


# Populating Your AI360 Database (PAC)



It is important to define the restricted class of employees who are eligible to engage in solicitations and make contributions to your PAC. Your internal Human Resources contact can provide valuable assistance in verifying the necessary data fields required for communications and outreach.

While many organizations populate their database with all their employees information for to support broader advocacy or GOTV initiatives, others with stricter data privacy requirements may limit the database to include only PAC eligible employees. If you need assistance determining your restricted class, please request a copy of our "FECA Restricted Class" overview, which provides guidance on how to determine PAC eligibility.



## REQUIRED & STANDARD DATA

To comply with legal requirements, it is necessary to collect the following information for any donor who contributes more than \$200 within a calendar year and report it to the Federal Election Commission. The remaining data points listed below are standard and commonly used fields for populating your database.

**FEC Required Data**

First Name	Last Name	Occupation	Employer
Work Address*		Work City, State, Zip	

**Standard Data**

EmployeeID/MemberID – a unique number to each individual	Prefix	Work e-mail address
Middle Name	Work phone number	Suffix
PAC Eligible indicator (US Citizen/Permanent US Resident)		

*\* An organization has the legal option to collect and report either work or home address. Generally, reporting the work addresses is a best practice so that employees' home addresses are not made public via the FEC reports. However, collecting personal addresses allows zip-to-district matching to know who lives and works in specific Congressional districts. Many organizations collect both work and home addresses for their employees. The Aristotle platform allows your PAC to have the flexibility to report either the work or home address for all donors, accommodating the specific needs and preferences of your organization.*



## RECOMMENDED DATA

Beyond basic information, you may need additional data points to effectively engage and reach out to eligible employees. Data may include:

- **Home address** – include for district zip-matching and understand your footprint and promote GOTV
- **Personal e-mail address** – utilize another e-mail address for outreach and engagement
- **Pay band or Pay level** – make recommendations on giving levels based on a pay level/band
- **Management or Employment level standardized** – project potential targets and goals based on your organization such as Executive, Vice President, Director, Manager, Individual Contributor.
- **Hire date** – welcome new hires and celebrate work milestones with this data point
- **Mobile Phone** – text message campaigns are another effective method for outreach and engagement
- **Office or building** – target employees in a specific location for an invitation, event, or message
- **Division** – specific and/or standardized business units help track participation across the organization
- **Manager Name** – report on percent participation or run contests between division leaders
- **Member Type** – association clients can segment and target based on the level of membership
- **Prior Approval** – track clients who authorized solicitation through prior approval campaigns



## OPTIONAL DATA

Depending on your organization and the goals for your advocacy and PAC program, these supplementary fields can support outreach and microtargeting your message.

- Race
- Gender
- Political affiliation
- Custom data
- Birthdate/Age
- Cost Center
- Generation (Baby boomer, Gen X, Millennial, Gen Z)
- Association Committee Membership/Leadership



## AUTOMATED IMPORT FEATURE

To promote custom information tracking, our Standard Automated Import feature allows for the organization of data into groups and categories. Additionally, it offers user-defined fields (UDFs) that allow you to capture specific data unique to your organization. For example, this can include:

- Employee Job Levels
- Board of Directors Membership
- Salary Ranges
- Citizenship Status

If you would like to pursue group/category/UDF assignments, please work with your Technical Account Manager to properly establish this within the Standard Automated Import file. The group/category/UDF breakdown can be facilitated with our without automation.

Once the information and data above are considered and a file containing eligible employee/member data is produced with the respective data fields, you may engage your Aristotle Technical Account Manager.

The file can be imported into the database manually, or Aristotle can engage with your HR/IT team to establish a process to automatically send the file to Aristotle on a pre-determined frequency and automatically imported into the database to refresh the data.



Implementing automation for this process can yield significant benefits such as streamlining operations, reducing the risk of human error, and maintaining a healthy and accurate database. By leveraging automation, you can ensure that your message reaches the intended stakeholders with precision and efficiency.