



TRUSTEE TOOLKIT

2023

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Hello!

Welcome to the BUILD-PAC Board of Trustees. You are the backbone of our industry and leading the charge to ensure NAHB's voice is HEARD on Capitol Hill. Being a BUILD-PAC trustee is not only a financial investment, but a huge investment of your time. Thank you for volunteering for this position.

The first thing I want you to know is that you're not alone. From the BUILD-PAC Officers to the Government affairs staff, we're here to help answer your questions and be a resource during your tenure.

In this Trustee Toolkit you will learn about your responsibilities and BUILD-PAC: from how to hold a fundraiser, who to contact with questions, and how not to break the law (we don't make the rules.) The BUILD-PAC team will be here every step of the way on your journey to becoming the best PAC Trustee you can be! For more information please visit the BUILD-PAC website at nahb.org/buildpac.

Again, THANK YOU for all you do, and will do to protect the home building industry and help provide a better pro-business environment for our members.

With Appreciation.

A handwritten signature in black ink that reads "Maria Coutts". The signature is written in a cursive, flowing style.

Maria Coutts
2023 BUILD-PAC Chairman

BUILD-PAC Staff

Meghan Everngam

Vice President, BUILD-PAC

MEverngam@nahb.org | 202-266-8259

- Gold Key Club
- Arizona, Arkansas, California, Colorado, Hawaii, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Michigan, Minnesota, Mississippi, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Texas, Utah, West Virginia, Wisconsin, Wyoming

Meredith Wimbrow

Fundraising Manager, BUILD-PAC

MWimbrow@nahb.org | 202-266-8114

- Capitol Club and Platinum Club
- Alabama, Alaska, Connecticut, Delaware, Florida, Georgia, Idaho, Maine, Maryland, Massachusetts, Montana, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, Washington

Grace Mercer

Coordinator, BUILD-PAC

GMercer@nahb.org | 202-266-8248

- Dollar-A-Day
- Century Club
- BUILD-PAC Accounting

BUILD-PAC's Fundraising team will provide you with:

- Fundraising numbers for your state (providing goals and amount raised for current and past cycles)
- A list of current and past contributors in your state
- Information or help with planning a fundraising event in your state
- Splitback program inquiries
- Reimbursement requests
- Distribution of BUILD-PAC giveaways

Federal Legislative Staff

Lake Coulson

Senior Vice President & Chief Lobbyist

LCoulson@nahb.org | 202-266-8510

- Environment/Transportation/Smart Growth/FEMA
- California, Texas

J.P. Delmore

Assistant Staff Vice President

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- Tax Policy
- Florida, Georgia, North Carolina, South Carolina

Scott Meyer

Assistant Staff Vice President

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- Single-Family Housing/Banking
- Indiana, Michigan, Ohio, Virginia, West Virginia

Alex Strong

Senior Federal Legislative Director

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- Trade & Building Materials/Property Rights/Regulatory Reform/Small Business/Technology/ Intellectual Property
- Alabama, Arkansas, Kansas, Mississippi, Missouri, Nebraska, Oklahoma, Tennessee

Heather Voorman

Federal Legislative Director

HVoorman@nahb.org | 202-266-8425

- Energy/Codes/Global Climate Change
- Connecticut, Massachusetts, Maine, New Hampshire, New Jersey, New York, North Dakota, Rhode Island, South Dakota, Vermont

Evan Loukadakis

Federal Legislative Manager

ELoukadakis@nahb.org | 202-266-8320

- Alaska, Arizona, Colorado, Delaware, Hawaii, Idaho, Illinois, Iowa, Kentucky, Louisiana, Maryland, Minnesota, Montana, Nevada, New Mexico, Oregon, Pennsylvania, Utah, Washington, Wisconsin, Wyoming

NAHB's Federal Government Affairs team is ready to help with:

- Requesting a BUILD-PAC check for Members of Congress and mailing it to the Trustee
- Setting up a check delivery meeting with Members of Congress
- Discussing BUILD-PAC contribution requests for candidates before NAHB board meeting
- Giving updates on NAHB's legislative priorities
- Providing a list of Members of Congress that we have supported this election cycle
- Going over congressional ratings report cards or information on key votes

BUILD-PAC Officers

2023 Governance

Maria Coutts

2023 BUILD-PAC Chairman

- Pennsylvania

Jules Guidry

First Vice Chairman

- Louisiana

Steve Martinez

Second Vice Chairman

- Idaho

Jim Chapman

Immediate Past PAC Chairman

- Georgia

Alma Jacobs

Associates Vice Chair

- North Carolina

Trustee Responsibilities

Trustee Structure

BUILD-PAC is governed by a 100+ member Board of Trustees. States are allotted one trustee per eight U.S. Congressional districts for every state.

Appointment of BUILD-PAC Trustees

Candidates for vacancies on BUILD-PAC's Board of Trustees must be recommended in writing (email or letter) by their state associations. In states without statewide NAHB affiliates, the NAHB National Representative recommends candidates for vacancies.

BUILD-PAC Trustee Responsibilities

- **Personal Contribution:** All trustees are required to make a minimum personal contribution of \$1,000 to BUILD-PAC annually.
- **Orientation:** Attending New Trustee Orientation is designed to familiarize new trustees with their responsibilities, organization bylaws and policies, and applicable federal laws.
- **Attendance:** Trustees must attend a minimum of two BUILD-PAC Board of Trustees meetings annually.
- **Fundraising:** Trustees serve as a BUILD-PAC principal fundraiser by planning at least one state fundraising event annually for BUILD-PAC.
- **Advocacy:** Trustees meet with federal legislators and represent NAHB members in their home state on policy matters. This includes participating in NAHB's Legislative Conference.
- **Grassroots:** Trustees contact federal legislators by using BuilderLink or by calling each legislator on the phone to talk about policy issues important to NAHB.
- **Candidate Contribution Requests:** Trustees make candidate contribution requests to NAHB's federal Government Affairs staff 21 days prior to the BUILD-PAC Board of Trustees meetings.
- **Delivery of Candidate Contributions:** Once a BUILD-PAC check has been issued, it is the responsibility of the Trustee to ensure that the contribution check is delivered within 30 days from the date of issue.

FAQ

What is BUILD-PAC?

- BUILD-PAC is NAHB's bipartisan federal political action committee (PAC) that helps elect pro-housing, pro-business candidates to the U.S. House of Representatives and U.S. Senate.

Why should I contribute to BUILD-PAC?

- If you're in business, you're in politics. BUILD-PAC is YOUR voice at the federal level. The more members who support BUILD-PAC, the stronger housing's voice is in the political process and on Capitol Hill.

Who can contribute to BUILD-PAC?

- Only NAHB members can be solicited for BUILD-PAC contributions.

Why can't BUILD-PAC use my dues money?

- Using member dues is prohibited. BUILD-PAC can only accept personal contributions and dues are often paid with corporate funds. It is against the law for a Federal PAC to receive corporate funds.

What forms of payment do you accept?

- BUILD-PAC is allowed to receive cash contributions up to \$100 annually per individual. Personal checks and credit cards (AmEx, MasterCard, and Visa) are accepted as well. BUILD-PAC is also allowed to receive anonymous contributions equaling no more than \$50.

How can I invest in BUILD-PAC?

- Contribute online at nahb.org/buildpac.
- Mail personal checks payable to BUILD-PAC or personal credit card information to: BUILD-PAC 1201 15th Street, NW Washington, DC 20005

Who determines which candidates receive BUILD-PAC support?

A Board of Trustees, made up of NAHB members, decides which candidates receive support. BUILD-PAC Trustees are nominated by each state.

Who does BUILD-PAC support?

BUILD-PAC is bi-partisan, regardless of political party. For a full list of candidates, visit NAHB.org/BUILDPAAC.

Who does BUILD-PAC favor? Democrats or Republicans?

- BUILD-PAC is bipartisan. Regardless of political party, BUILD-PAC supports the best candidate for housing.

How can I learn more about BUILD-PAC and NAHB advocacy efforts?

- Contact BUILD-PAC staff by phone at 202-266-8248 or by email at GMercer@nahb.org.

State Fundraising Goals

The overall BUILD-PAC fundraising goal for the 2023-2024 cycle is **\$3.25 million**.

Each two-year election cycle, BUILD-PAC establishes a fundraising goal for every state. This goal is based on housing permits, membership numbers, and a percent of the overall BUILD-PAC fundraising goal. State goals are based on a formula developed by NAHB's Economics Department. Additionally, every state has also been given a Fair Share goal to help increase member participation.

State Goal Formula:

Calculate percentage of permits. The number of state housing permits = % of overall U.S. Permits (A)

Calculate percentage of membership. The number of NAHB members in the state = % of Total NAHB Membership (B)

Add the two percentages together. (A)% + (B)% = Total %

Multiply total percentage by the BUILD-PAC overall goal (\$3.25 Million) and divide by 2

Total % x \$3,250,000 / 2 = (State Goal)

State Fundraising Goals

State	Fundraising Goal	State	Fundraising Goal
Alabama	\$129,744.66	Montana	\$24,613.17
Alaska	\$7,327.63	Nebraska	\$17,616.10
Arizona	\$66,292.67	Nevada	\$23,081.90
Arkansas	\$26,920.43	New Hampshire	\$11,702.62
California	\$141,251.51	New Jersey	\$54,747.58
Colorado	\$65,852.53	New Mexico	\$32,724.75
Connecticut	\$17,081.71	New York	\$70,893.61
Delaware	\$11,397.54	North Carolina	\$285,606.51
Florida	\$289,676.55	North Dakota	\$23,270.69
Georgia	\$125,001.14	Ohio	\$70,824.35
Hawaii	\$9,040.71	Oklahoma	\$41,072.45
Idaho	\$33,697.91	Oregon	\$54,514.49
Illinois	\$32,601.52	Pennsylvania	\$80,713.31
Indiana	\$57,838.27	Rhode Island	\$5,615.27
Iowa	\$42,154.84	South Carolina	\$78,237.40
Kansas	\$31,011.87	South Dakota	\$34,365.18
KCHBA	\$17,811.61	Tennessee	\$85,817.88
Kentucky	\$61,043.57	Texas	\$363,609.98
Louisiana	\$77,882.53	Utah	\$63,457.99
Maine	\$9,340.90	Vermont	\$4,370.71
Maryland	\$30,253.96	Virginia	\$75,451.37
Massachusetts	\$37,870.49	Washington	\$156,010.35
Michigan	\$79,691.71	West Virginia	\$10,341.12
Minnesota	\$47,200.12	Wisconsin	\$69,837.10
Mississippi	\$24,888.58	Wyoming	\$5,533.64
Missouri	\$33,095.53		

Know the Law

- BUILD-PAC is **regulated by the Federal Election Commission (FEC)**.
- **Only individual dues paying members** of NAHB can be solicited for BUILD-PAC contributions. Solicitations to the general public are prohibited.
- **Only personal checks or credit cards** are accepted by BUILD-PAC.
- Checks from **LLCs, LLPs and sole proprietors NOT taxed as corporations may be accepted** by BUILD-PAC as long as they also submit an attribution form stating that the contribution is from his/her personal account. BUILD-PAC staff can send you the attribution form and a copy can be found at the end of this Toolkit.
- Contributions **cannot be reimbursed by an employer**. Corporate contributions to BUILD-PAC are prohibited by law.
- **Contributions are not tax deductible.**
- **Foreign nationals cannot contribute** to BUILD-PAC. BUILD-PAC can only accept contributions from U.S. citizens and foreign citizens lawfully admitted for permanent residence (green card holders).
- The **maximum contribution allowed is \$5,000** annually per individual.
- **Contributions to BUILD-PAC are completely voluntary.**
- Federal law requires PACs to **report the name, mailing address, occupation, and employer for each individual.**
- The below **disclaimer needs to be on all solicitations and invitations:**

Contributions to BUILD-PAC are completely voluntary. You may choose not to contribute without reprisal. Contributions to BUILD-PAC will be used for political purposes and are not tax deductible for federal income tax purposes. Federal law requires political action committees to report the name, mailing address, occupation, and name of employer for each individual whose BUILD-PAC contributions exceed \$200.00 in a calendar year. Foreign nationals cannot contribute to BUILD-PAC.

- **Checks must be signed by the person making the contribution.** If your spouse signs your check, you and your spouse will need to sign a form attributing the contribution to you. BUILD-PAC staff can send you the attribution form and a copy can be found at the end of this Toolkit.
- The FEC requires that all contributions of \$50 or less must be sent to BUILD-PAC within 30 days; contributions over \$50 must be received within 10 days.
- Cash contributions cannot exceed \$100 annually and anonymous contributions cannot exceed \$50. Do not send cash through the mail. Convert it to either a cashier's check or a money order. A cashier's check or money order must be sent with a list of contributors and all required reporting information.
- The FEC's One Third Rule states: the value of a prize/gift to a PAC contributor cannot exceed one-third of the amount contributed to BUILD-PAC.

The FEC's One-Third Rule

Federal law allows associations to pay for costs incurred in the establishment, administration and solicitation of contributions to its own PAC.

The FEC's One-Third Rule requires the cost of prizes NOT to exceed one-third of the money contributed to the PAC as a result of the raffle, auction or giveaways.

Food and beverages are not subject to the FEC's One-Third Rule.

Examples of One-Third Rule

- **Prizes, Giveaways, and Raffle Items:** All prizes and giveaways at a BUILD-PAC event, including raffle items, must comply and may not exceed one-third of the money raised at an event.
 - *Example A:* NAHB offers a \$1,500 computer as the prize for a raffle to raise money for BUILD-PAC. As long as the raffle raises at least \$4,500, it is in compliance with the One-Third Rule.
 - *Example B:* BUILD-PAC wants to give every \$1,000 contributor a pen and pencil set worth \$100. One-third of \$1,000 is \$333.33. Because the set costs only \$100, the One-Third Rule has been complied with.
- **Auction Items:** All auction items must not exceed one-third of money raised at the event.
- **Golf Outings:** The value of greens fees plus any giveaways are subject to the One-Third Rule. For this reason, BUILD-PAC advises against golf outings. It is best to hold an HBA golf outing in conjunction with a post-play reception in support of BUILD-PAC.

BUILD-PAC Champions

The BUILD-PAC Champions program is designed to recognize, support and thank our most successful fundraisers. Are you a BUILD-PAC advocate at the state and local level? Do you recruit new BUILD-PAC members? If so, you are a future BUILD-PAC Champion!

How to Become a Champion

- Recruit new donors.
- Raise a total of \$10,000 in **NEW** money between 2023-2024.
- Make sure that all the donors you recruit indicate that you recruited them, if we don't know we can't give you the credit!
- All aspiring BUILD-PAC Champions **MUST** register for the Champions program. For BUILD-PAC staff to properly track contributions you've raised, register for the program online **AND** make sure that all donors list your name in the "Recruited by" section located at the bottom of the contribution form (Located at the end of this Toolkit).

What Benefits Come with Being a BUILD-PAC Champion?

- Exclusive access to the Capitol Club hospitality suite during NAHB's International Builders' Show (IBS).
- Invitation to the Capitol Club dinner during IBS to be recognized and thanked.
- Name recognition at NAHB's annual board meetings.

What is Considered New Money for BUILD-PAC?

- NAHB members who have never contributed to BUILD-PAC.
- NAHB members who did not contribute the previous year.
- NAHB members who upgrade their contribution amount.

High Donor Clubs & Benefits

BUILD-PAC consists of three high donor clubs, Capitol Club, Platinum Club, and Gold Key Club. Members of NAHB can contribute at these club levels and receive benefits at IBS and Spring Leadership Meeting. Each club consists of payment plan options. Donors have the option to be placed on autorenewal or invoice payment plans.

Capitol Club

Payment Options:

- \$5,000 annually
- \$1,250 quarterly
- \$416.67 monthly

Members 45 and under receive all the benefits of Capitol Club at a discounted price of \$2,500 annually, \$625 quarterly, or \$208.33 monthly.

Benefits:

- Capitol Club lapel pin.
- Special name recognition during NAHB's annual board meetings
- Invitations to private receptions and dinners held during NAHB's International Builders' Show (IBS) and the Spring Leadership Meeting.
- Access to a private hospitality suite during NAHB's annual board meetings at IBS and Spring Leadership, offering breakfast, lunch and a full open bar.
- Complimentary roundtrip airport transportation during IBS and the Spring Leadership Meeting.
- VIP seating for two at the IBS Opening Ceremonies.
- Exclusive email communications and political updates.

Platinum Club

Payment Options:

\$2,500 annually

\$625 quarterly

\$208.33 monthly

Benefits:

- Platinum Club lapel pin.
- Special name recognition during NAHB's annual board meetings.
- Access to a private hospitality suite during the International Builders' Show (IBS) offering breakfast, lunch and a full open bar.
- Invitations to exclusive receptions and events held during IBS and the Spring Leadership Meeting.
- Complimentary roundtrip airport transportation during IBS.
- Exclusive email communications and political updates.

Gold Key Club

Payment Options:

- \$1,000 annually

- \$250 quarterly

- \$83.33 monthly

Benefits:

- Gold Key Club lapel pin.
- Special name recognition during NAHB's annual board meetings.
- Invitations to exclusive receptions and events held during NAHB's International Builders' Show (IBS) and Spring Leadership Meeting.
- Access to a private hospitality suite during IBS: a great place to relax and grab a drink.
- Exclusive email communications and political updates.

Fundraising Tips and Ideas

Tips for a Successful Fundraising Event

- Determine a price point that works for your membership.
- Check availability that doesn't conflict with other HBA events.
- Establish a point of contact for coordinating the event.
- Draft a fundraising plan and goal.
- Secure personal commitments prior to event.
- Think about special guests who could draw an audience.
- Educate your potential investors prior, during and after your event.
- MAKE THE ASK! Don't assume you know the answer! – You never know if someone is interested in investing in BUILD-PAC until you ask!

Fundraising Event Ideas

- Barbecue or Chili Cook-off
- Bowling
- Cocktail Reception
- Congressional Update
- Dinner Cruise
- Fishing Trip
- HBA Luncheon
- HBA Meeting Reception
- Holiday Party
- Clay Shooting
- Legislative Breakfast/Briefing
- Major/Minor League Baseball, Basketball, Football or Hockey Game
- Officer Installation Banquet or Reception
- Oktoberfest Party
- Pizza and Politics
- "Post Play" Golf Tournament Reception
- Scotch & Cigar
- Silent Auction
- Tailgate Party
- Wine Tasting

Staff Assistance for Events

Each state has an assigned BUILD-PAC fundraising manager. Please see the BUILD-PAC staff contact page for your state fundraising manager's contact information. Your fundraising manager is available to provide event planning, logistical support and on-site management throughout the planning process of hosting a BUILD-PAC fundraising event. These services are provided to state and local associations and are encouraged for any event, big or small.

Fundraising Managers can help you with the following:

- Invitation design
- BUILD-PAC brochures
- Past and current contributor lists from your state or local HBA
- Giveaways such as notepads, pens, mints, koozies, hats, etc.
- Prizes such as: wine glasses, golf balls, golf shirts, etc.
- Sending invitations through NAHB's blast email system to all state members
- Sending hard copy invites to NAHB members
- BUILD-PAC state reports
- Tracking RSVPs and contributions
- Send a list of federal candidates we have supported in your state

Special Guests

NAHB Senior Officers, BUILD-PAC Officers and staff can travel subject to schedules to events with enough notice. They can give updates on what is happening in Washington, and discuss the importance of BUILD-PAC and being part of the political process. Request a Special Guest through the Event Notification Form on our website.

Fundraising Incentives

Expense Reimbursement Program

BUILD-PAC has an expense reimbursement program for state and local associations that host events. To qualify for an expense reimbursement, your association must notify your BUILD-PAC fundraising manager six weeks prior to the event. It also must send in all contributions within the legal timeframe of 10 days after the event.

Up to \$3,000 may be reimbursed to an association if it raises double this amount in new money. For example, if a state raises \$5,000 in new money through an event, BUILD-PAC will reimburse up to \$2,500 in expenses.

All receipts must be submitted to be eligible for reimbursement. Renewals of high donor club members do not qualify as new money. NAHB can reimburse for most event needs, as well as food and beverage costs. Please see the "One-Third Rule" found in the Legal section.

Splitback Program

The splitback program allows BUILD-PAC to give money back to the states that go above and beyond their fundraising goal. A state receives half of all additional funds raised over the goal. For example, if a state's goal is \$10,000 and it raises \$15,000, it will receive a \$2,500 check written to the state HBA.

Once a state has exceeded its fundraising goal, the BUILD-PAC Board of Trustees will review and approve splitback amounts at the next BUILD-PAC Board of Trustees meeting. Once approved, the state trustee must request the splitback check from BUILD-PAC staff.

BUILD-PAC Forms

BUILD-PAC Contribution Form

- ***When should I use the contribution form?***
 - Please use the contribution form for all personal contributions to BUILD-PAC. This form can be used at state fundraising events or to make your personal contribution to BUILD-PAC.

BUILD-PAC Attribution Form

- ***When should I use the attribution form?***
 - Only personal checks or credit cards are accepted by BUILD-PAC. Checks from LLCs, LLPs and sole proprietors **NOT** taxed as corporations ***may be accepted by BUILD-PAC as long as the donor also submits an attribution form stating that the contribution is from his/her personal account.***

If you have any further questions, please reach out to Grace Mercer at GMercer@nahb.org.

Forms are on the following two pages.