WHEN WEALTHY CONTRIBUTORS JOIN FORCES

New Research on Donor Consortia in U.S. Politics

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Although scholars and pundits are paying more attention to the role of big money in U.S. politics, most focus on campaign contributions from individual wealthy celebrities like Charles Koch or Tom Steyer – or else probe patterns of election contributions from aggregations of wealth holders. Here I report ideas and findings from the Shifting Terrain project at Harvard, which instead traces the activities and influence of *organized donor consortia* – with particular attention to the Koch seminars operating since 2003 on the far right (Mayer 2016) and the Democracy Alliance operating since 2005 on the progressive left (Bai, 2007; Prokop 2014). Donor organizations deserve at least as much attention as individual contributors, because their impact extends to shaping public policy agendas and larger organizational infrastructures.

What Are Donor Consortia?

Taken together, five features set organized donor consortia apart even from other kinds of joint political activity by wealthy elites:

(1) Continual giving by members. Donors in the Koch seminars and the DA do not simply write one-off checks as they might to PACs or advocacy groups. The consortia attract "member" donors in order to foster longer-term commitments among like-minded wealthy people who give at or above a predictable minimum level year after year. DA partners who are individuals or two-member households pay $30,000 annually in dues and pledge donations to DA-recommended or approved organizations that total at least $200,000 each year (see Democracy Alliance 2015c). Analogously, Koch seminar members (whether individuals or households, we do not know) contribute "at least $100,000 a year to the causes Charles Koch and his brother David promote" (O'Connor 2015; see also Vogel 2014b).

(2) A time horizon beyond individual election cycles. Because they can deploy substantial and sustained resources, donor consortia can do more than simply try to elect or reelect Democrats or Republicans. To advance sets of principles and policies over time, they can channel resources to idea creation, civic action, leadership development, and policy formulation unrelated to winning particular elections. Consortia have some similarities to foundations, because, in principle, they can make risky investments that might take a long time to realize objectives such as shifting American political culture, reorienting policy agendas, or empowering future generations of political leaders.

(3) Focus on a wide range of political endeavors and policy issues. While other donor groups – such as the Club for Growth (Bai 2003) – focus laser-like on one overall, donor consortia get involved in many domains of policy and politics. The Koch seminars, for instance, fund activities ranging from academic work on libertarian thought to more directly political activities such as defeating policies to address climate change.

(4) Focus on supporting fields of organizations, not just candidates. Support for individual candidates is certainly encouraged by donor consortia and consortium-supported organizations channel resources into election campaigns. Nevertheless, the overarching agendas of donor consortia focus on funding entire fields of political organizations, including those involved in education and the production of ideas as well as advocacy groups and constituency mobilizing organizations. Sets of organizations funded through the consortia operate both within and between elections and focus on changing public policy as well as getting particular kinds of candidates and staffers into office.

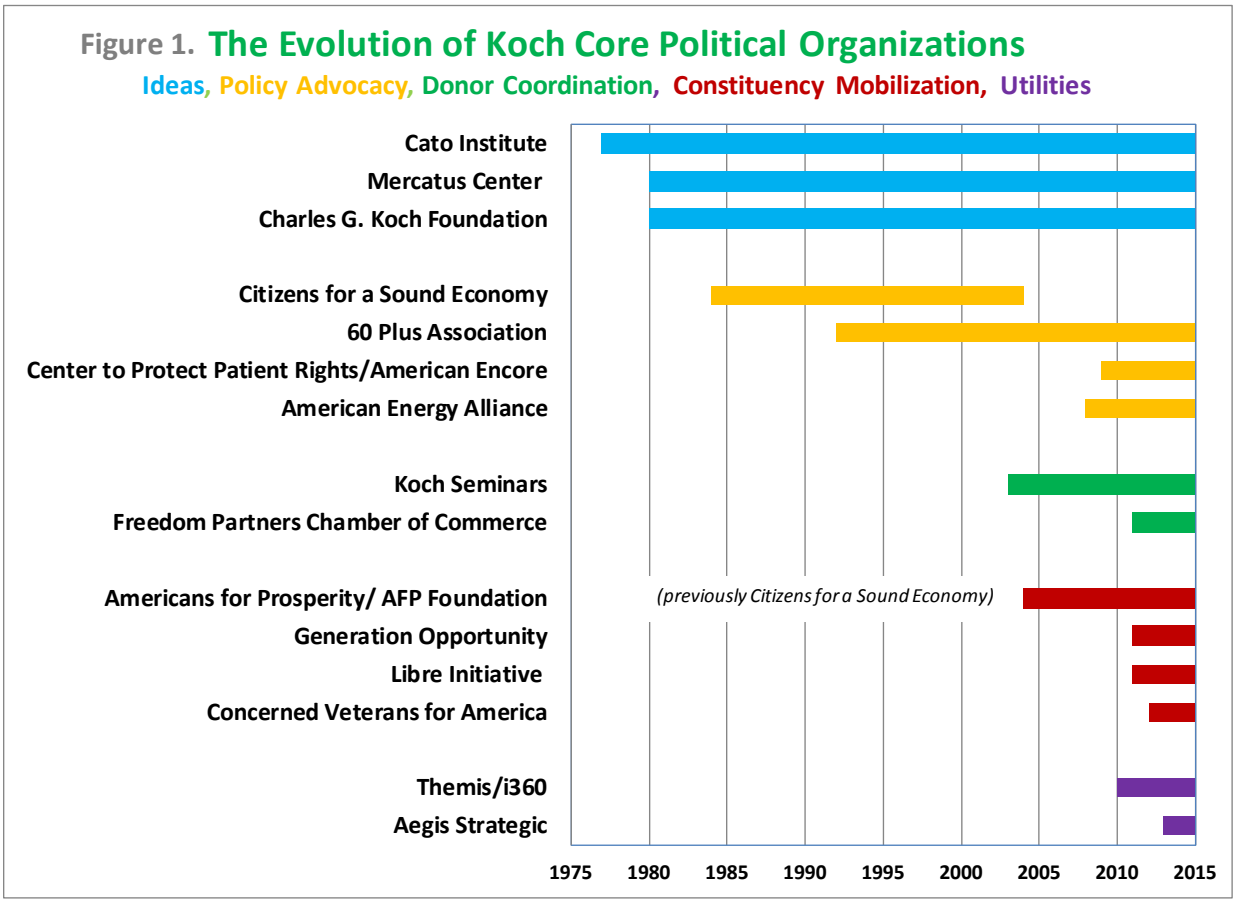
(5) A major social component. Last but not at all least, donor consortia build and leverage social solidarity – weaving ties among wealthy donors and between donors and other political players. Participation in an organized consortium offers donors opportunities to attend recurrent meetings with a mix of serious discussions and social events held over several days in posh locations (see e.g., Koch 2010). At these meetings (for programs, see Democracy Alliance 2010, 2014a; Koch 2010; Freedom Partners Action Fund 2014), donors attend sessions with important political operatives, media figures, advocacy group heads, and the occasional intellectual from their side of the ideological spectrum. Donors also get to know one another, constructing a purposeful community where people share political vocabularies, values, and morally grounded perspectives on political challenges they should tackle.

Because they combine all of these features, donor consortia have the potential to achieve political clout greater than the sum of individual member efforts – and also greater than the efforts of partisan Super PACs and anti-tax advocacy groups. Like keystone business associations such as the U.S. Chamber of Commerce, the DA and the Koch consortium can advance broad agendas between as well as during elections. But the donor consortia differ even from major business associations in the stress they place on building membership solidarity and advancing shared worldviews as well as policy goals.

The Koch Seminars and the Democracy Alliance

Launched in 2003, the Koch seminars were the brainchild of Koch Industries chieftain Charles Koch along with his brother David and a handful of close advisors, especially former academic and political strategist Richard Fink (Fink 1996; Schulman 2014b). The first seminar met in Chicago, where less than twenty business leaders, mostly

friends of Charles, joined Koch insiders to hear non-stop, dry lectures about libertarian philosophy and free-market economics (Wenzl 2015; Wilson and Wenzl 2012). Attendance trended up after 2006, as the seminars were spiced up with invited speakers from the worlds of GOP politics and conservative media. After Democrat Barack Obama moved into the White House, wealthy conservatives clamored for invitations and the seminars exploded "as antagonism toward Obama built among the 0.01 percent on the right" (Mayer 2016:7).



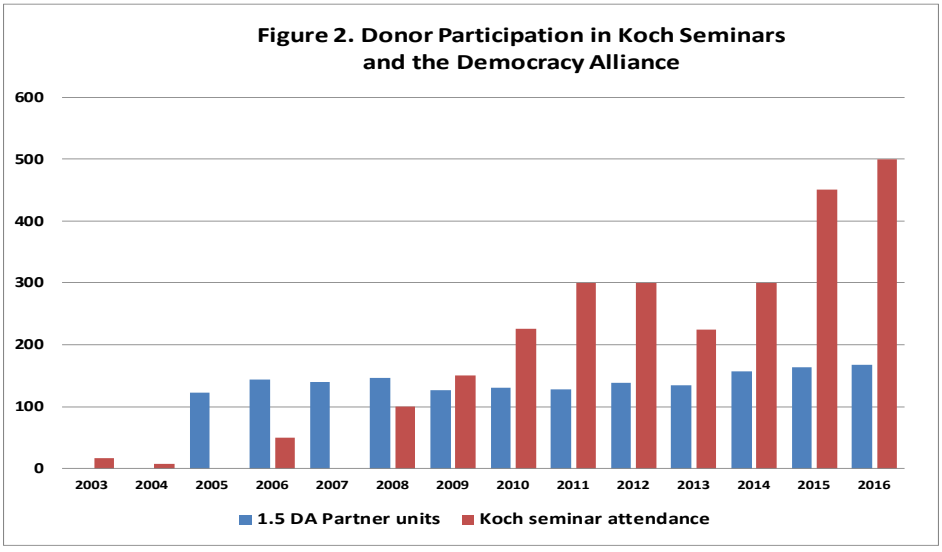
Importantly, the Koch donor seminars have always been a symbiotic part of an integrated set of political endeavors known by now as "the Koch network." Figure 1 portrays the evolution of that network (and further information about core organization appears in Appendix A). For decades, Charles and David Koch ("the Koch brothers" in the popular media) have poured money from their rapidly growing industrial fortunes into

efforts to reshape U.S. politics and policies. First, they made sustained contributions to the Cato Institute, the Charles G. Koch Foundation, and the Mercatus Center at George Mason University (Schulman 2014a; Wilson and Wenzl 2012). In the 1980s, they added funding for lobbying and astroturf organizations like 60 Plus, a group focused on privatizing social insurance programs, and Citizens for a Sound Economy, an advocacy group that attracted corporate funding to fight regulations and taxes. Finally, worried about the GOP in the early 2000s, they launched the Koch seminars plus a new political-party-like federation called Americans for Prosperity to synchronize lobbying and grassroots mobilization for elections and policy battles in dozens of states as well as in Washington DC. Over the last five years, the Kochs have added specialized pieces to the network mix, including constituency mobilizing organizations focused on military veterans, young people, and Latinos (Higgins 2016; Mundy 2016; Overby 2015; Parker 2015) and election utilities focused on collecting and analyzing voter data and grooming appropriately conservative GOP candidates (Vogel 2015a). Starting in 2012, a centerpiece "Koch political bank" called the Freedom Partners Chamber of Commerce took over running the fast-growing Koch seminars; and in 2014 an affiliated political action committee was set up to allow Koch donors to make federal campaign contributions (Goode and Vogel 2014; Vogel 2014b, 2015b).

In 2005, the Democracy Alliance was launched through the efforts of a Democratic Party veteran, Rob Stein, who developed an analysis of the U.S. right that inspired center-liberal donors to go beyond one-time election contributions (Bai 2007, Shaffer 2006). Like the Koch seminars, the DA meets twice a year to hear assessments of the political landscape and consider fruitful directions for contributions to an array of organizations. In DA's earliest years, "partners" started to direct donations to vetted progressive

organizations focused on policy development (such as the e.g., the Center for American Progress and the Center on Budget and Policy Priorities), media (e.g., Media Matters), voter data and mobilization (e.g., Catalist and AmericaVotes), and leadership development (e.g., Progressive Majority) (Democracy Alliance 2005). From the start, the Democracy Alliance had its own professional staff managed by a DA president and supervised by a small elected board, but unlike many similarly structured liberal groups, the DA has experienced repeated leadership shifts. Since the 2014 installation of current president Gara LaMarche, the Alliance aspires not only recommend progressive organizations for support, but also to serve as a national hub where wealthy donors, labor unions, and many philanthropic foundations cooperate to promote progressive goals (see LaMarche 2014).

At first, the Democracy Alliance attracted a larger donor membership than the contemporaneous Koch seminars (according to data in Markay 2014 and additional data provided by DA). But the DA advantage was short-lived, as Figure 2 shows.[1] Net recruitment of DA partners stalled after 2009, even as reported Koch membership trended upward – despite a dip for the Koch seminars right after Barack Obama, to conservative dismay, was re-elected to the presidency in 2012.

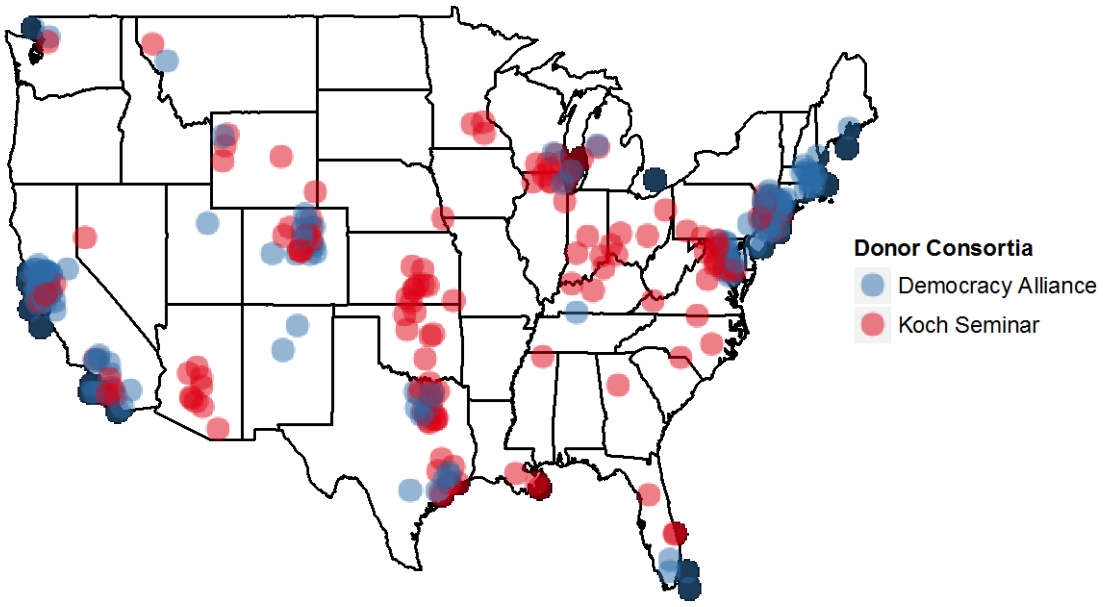


Koch and DA Donors

Because there are no publicly available, annually updated membership lists, we have relied on donor self-identifications (e.g., Deason 2015; Moore 2006; O'Connor 2015; O'Neill 2015; Yantz 2015) as well as on media reports and other public sources, including leaked documents (Koch 2010; Kroll and Schulman 2014; Windsor 2014). From these, we have constructed lists of DA and Koch donors (both individuals and family groups).

- As displayed in Figure 3, 149 Koch donors live all over the country while 142 DA partners mostly reside in the Acela corridor, the Bay Area, and Los Angeles.

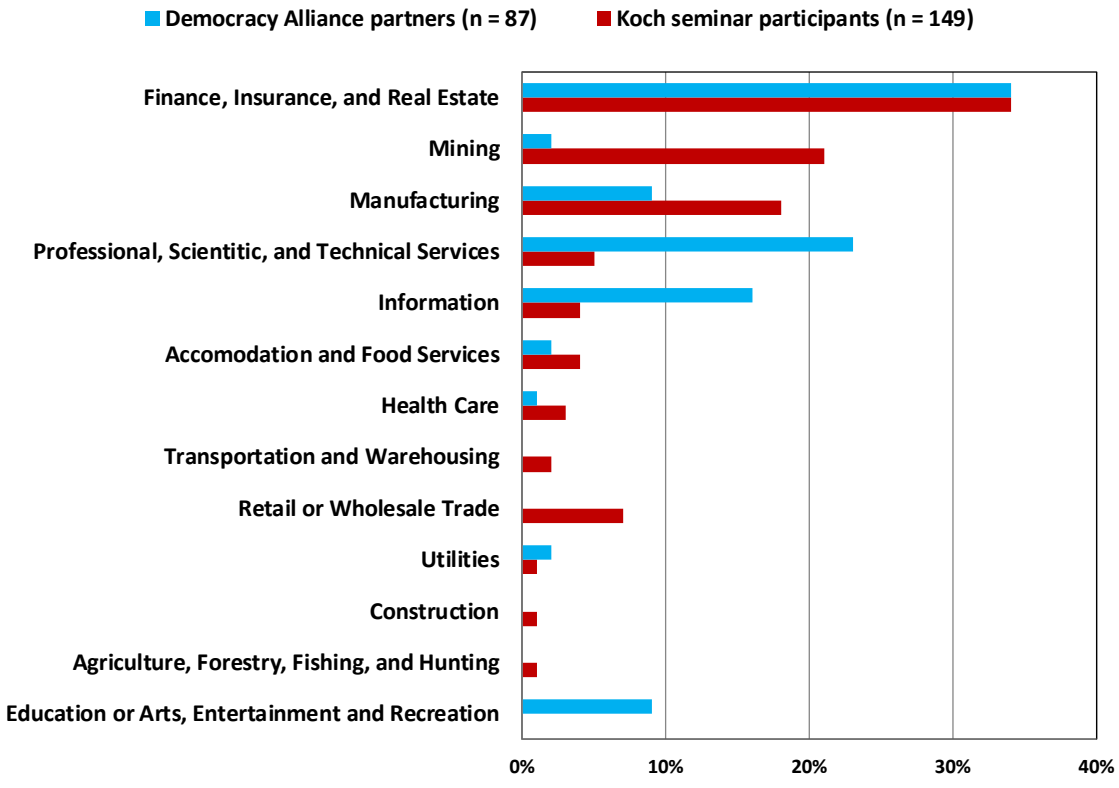
Figure 3.



- More than a third of Koch donors (37%) currently serve on corporate boards and 40% of them have served on such boards at one point or another, whereas only 19% of DA partners currently sit on corporate boards (and only one in five ever have).

- For both Koch and DA donors, the chief source of wealth (for 34% of each set) is "finance, industry, and real estate." Otherwise, sources of wealth are different.

Figure 4. Sources of Wealth for Koch and Democracy Alliance Donors

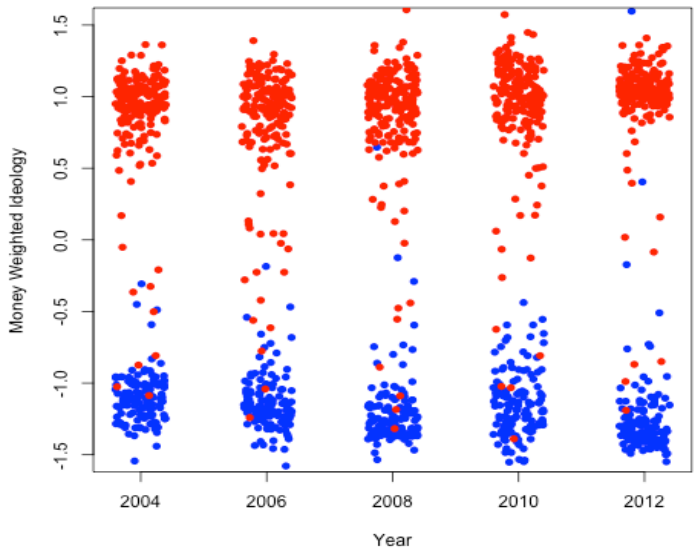


Assessing the Impact of Consortium Participation

Does participation in these consortia influence individual donors' contributions to political party committees and candidates? To find out, names on our Koch and DA lists have been matched to complete political giving records for 2004 through 2012 available from the Database on Ideology, Money in Politics, and Elections (DIME) at Stanford University (Bonica 2013). So far, we have tracked donors from the beginning of the two consortia around 2004, the first election cycle after the passage of the McCain-Feingold Bipartisan Campaign Reform Act. Although donation numbers and sizes do not change, we find some evidence that Koch donors gave to increasingly more conservative GOP

candidates, while DA donors directed their contributions to ever more liberal candidates. This is true even when we take into account that candidates became more extreme.

Figure 5. Average CFscores Weighted by Donation Size for Koch Seminar Members (red) and DA Partners (blue)



T-tests for CFscores weighted by donation size for DA members

	2004	2006	2008	2010	2012
2004	1	0.2004	0.0002	0.0785	0.0001
2006		1	0.0112	0.5623	0.0029
2008			1	0.0622	0.3629
2010				1	0.0145
2012					1

T-tests for CFscores weighted by donation size for Koch members

	2004	2006	2008	2010	2012
2004	1	0.2449	0.6348	0.4744	0.0107
2006		1	0.4540	0.0682	0.0003
2008			1	0.2280	0.0016
2010				1	0.0787

2012	1

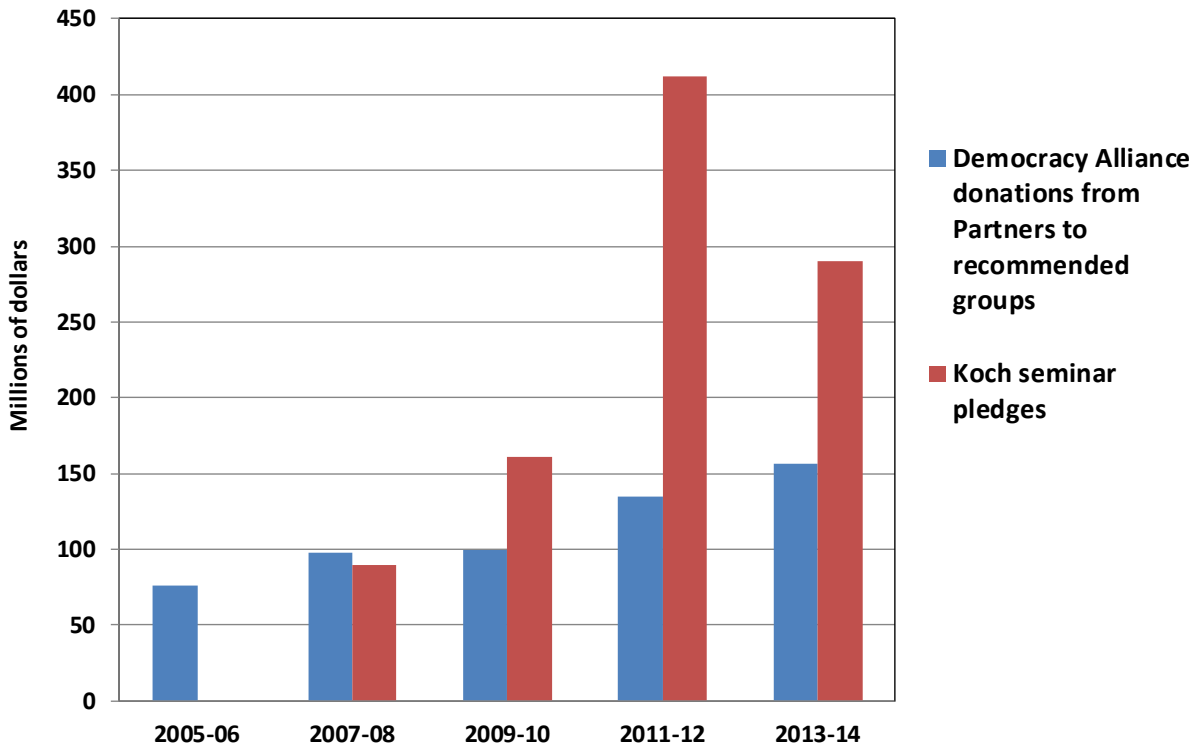
Although causality remains to be pinned down, our findings suggest that donor consortia may influence how wealthy individuals think about candidates they want to support. As data become available for 2012 and beyond, we may see increasing contribution sizes in the wake of *Citizens' United*. We are also doing new analyses paralleling Hassell (2015) and investigating whether candidates who appear at DA or Koch meetings enjoy subsequent upticks in donations from consortium members.

Channeling Resources to Arrays of Organizations

Election contributions aside, the Koch and DA consortia aim to reconfigure organizational resources and ties on their respective ends of the U.S. political landscape. To shed light on how this happens, we have analyzed membership rules and meeting programs and tracked (to the extent possible) the flows of funds from the Koch and DA consortia to favored sets of organizations. Here are some of our key findings:

- By now, Koch seminar fundraising far outpaces resource mobilization through the Democracy Alliance, as we see in Figure 6, which juxtaposes media reports of two-year Koch donor pledges to two-year aggregations of donations made by DA partners. The DA trends refer to combined donations to highly recommended groups as well as donations to other approved DA groups (using data from LaMarche 2014; Democracy Alliance 2014b; Democracy Alliance 2015b).

Figure 6. Fundraising by the Democracy Alliance and the Koch Seminars



- At Koch seminar meetings, conservative donors are exposed to a unified political strategy and urged to donate to Koch organizations; since 2011, they are especially urged to give via Freedom Partners, which in turn channels grants mostly to other Koch-run political organizations. By contrast, DA conferences operate as organizational bazaars, introducing partners to dozens of recommended or approved think tanks and advocacy groups to which they may contribute, leaving it up to each individual donor to put together his or her own menu of beneficiary groups. Except for managing recently created funds to encourage efforts in selected states (see Gold

2015; Democracy Alliance 2015a), the Democracy Alliance itself does not control or dispense most partner donations. Its acts more like a donor advisory body.

- Because the growth of DA partnerships has not kept up with the number of organizations recommended and approved for partner support, Democracy Alliance partners are spreading relatively limited funding across a growing number of center-left organizations and funds.[2] Although we do not yet have the details for 2016, the totals for partners and contributions may have increased considerably in the past year.

DEMOCRACY ALLIANCE TRENDS, 2005-15

	Partners	Core donations (in $ millions)	Core groups/funds supported	Additional groups eligible for support	Additional donations (in $ millions)
2005	82	$32.9	9		
2006	96	$43.3	29		
2007	93	$45.6	32		
2008	98	$51.9	34		
2009	84	$48.3	30		
2010	87	$51.5	32		
2011	85	$44.3	34		
2012	92	$35.1	19	96	$55.7
2013	90	$28.8	21	151	$40.5
2014	99	est. $31.1	21	152	??
2015	112	goal $50	44	139	??

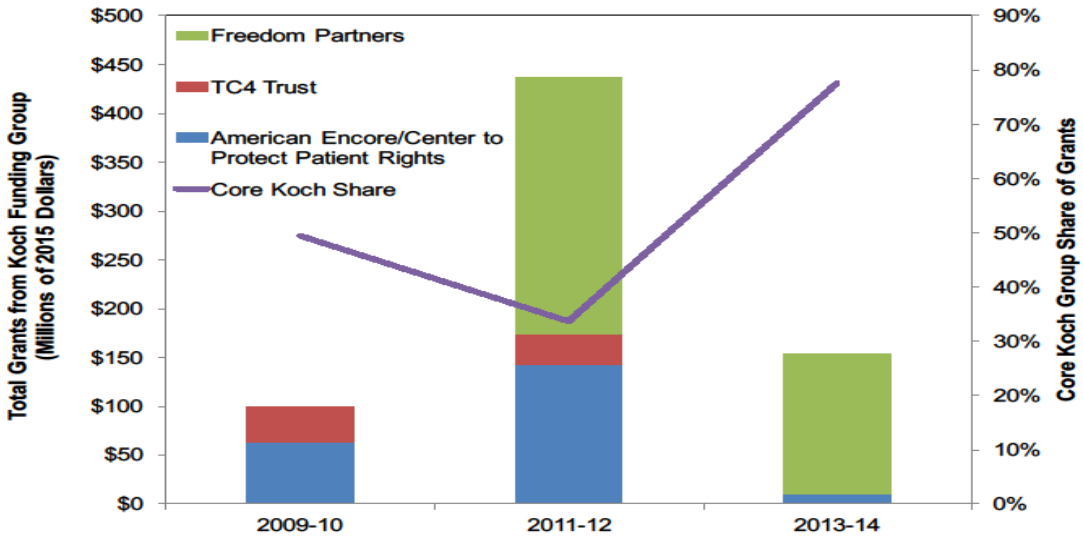
Notes: 2014 core donations estimated from targets; 2015 goal set in LaMarche 2014.

Sources: LaMarche 2014, supplemented from Democracy Alliance 2015b and LaMarche communication.

- Meanwhile, Koch seminar dollars have followed a quite different trajectory. Around the time of the 2012 election, Koch donor support flowed not only to organizations in the overall Koch network but also to several dozen independently run conservative

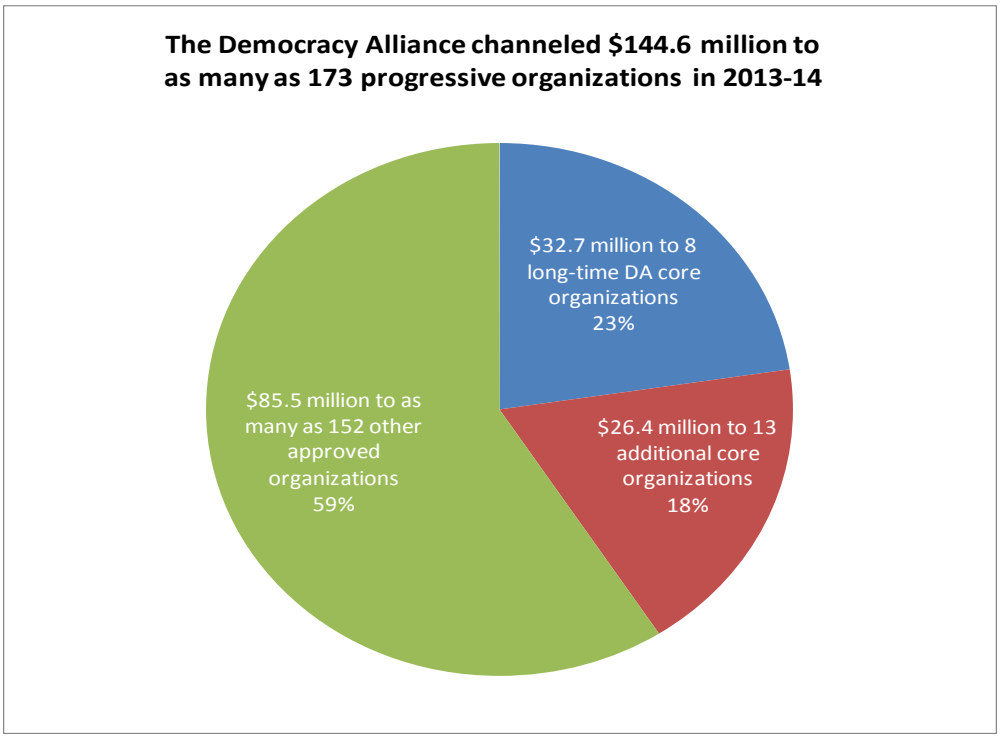
groups (including business associations, the National Rifle Association and assorted Christian right organizations). After Barack Obama was reelected, the Koch network reevaluated its options (Kroll 2013; Vogel 2014a) and started to redirect that vast bulk of sharply increasing seminar member donations toward a limited array of educational and political organizations directly run by Koch-installed operatives. Although we cannot trace the approximately 40% of Koch donor funding that goes to Koch think tanks and foundation efforts, for recent years, we can use IRS 990 reports that list donations for "general support" grants to various political groups supported through Koch conduits including the TC4 Trust, the Center for Patient Rights, and Freedom Partners (Maguire 2013a, 2013b). Figure 6 sums up the grant totals from these conduits in recent two-year periods – and also indicates the percentages of total funding that went to the Koch network's own political organizations during each period.[3]

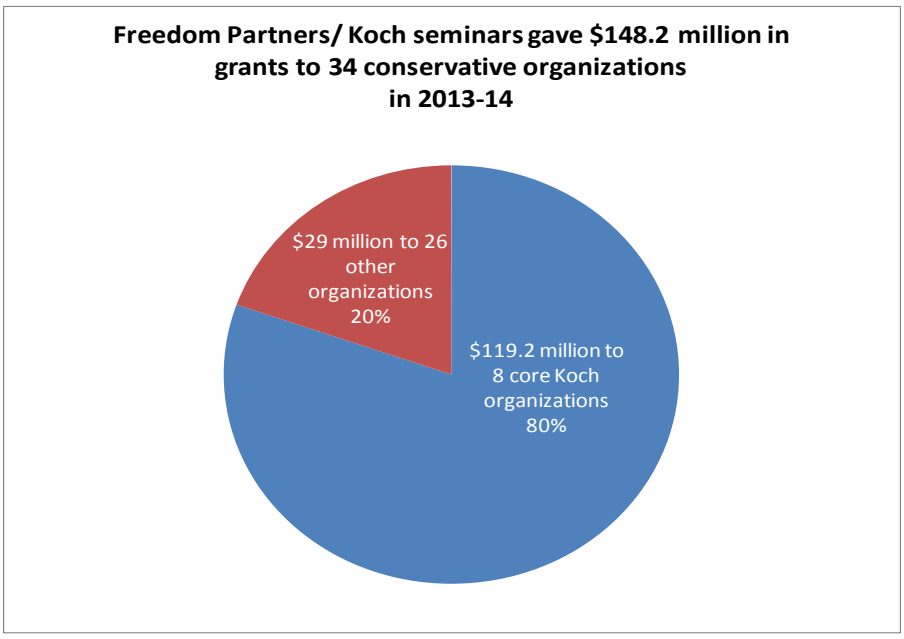
Figure 7. Koch Conduits and Percent of Total Grants to Koch Political Groups



To sum up the funding contrasts, we have pulled together the pie charts to dramatize 2013-14 patterns of organizational funding through these consortia.

Figure 8. Funding for Political Organizations through the Democracy Alliance and the Koch Seminars, 2013-14





In the DA pie chart, we classify organizations into three categories: long-time core recommended groups that had been on the core DA funding list continuously since 2007; all other groups on the 2013-14 core list of groups highly recommended for partner support; and the dozens of additional groups to which partners can donate in fulfillment of their annual pledges. In the Koch pie chart, recipients of Freedom Partners grants are sorted into two categories: Koch political organizations versus all others.

The bottom line is clear. Even in a two-year period where roughly similar amounts of donor money were given by DA partners and through the Koch seminars/Freedom Partners conduit, the patterns of deployment were quite different. The Democracy Alliance encouraged (and allowed) relatively small gifts directed to many dozens of organizations, while Koch seminar members who channeled donations through Freedom Partners ended up concentrating their support on eight core Koch political organizations. (As noted earlier, additional seminar donations surely also flowed to the Koch Foundation and think tanks, and directly to political groups like AFP and the Freedom Partners PAC.)

What difference, exactly, do these contrasting patterns of raising and deploying donor funds make? As our research group has established in various case studies, there is considerable evidence that the 2000s Koch network, fueled by steadily rising seminar donations, has succeeded in shifting the Republican Party and U.S. national and state-level policy agendas toward the ultra-free-market right (Mayer 2016; Skocpol and Hertel-Fernandez 2016; Vogel 2014a, 2015c). Koch-funded political organizations, especially Americans for Prosperity, have had a measurable impact on the policy positions GOP officeholders and politicians take and on outcomes of legislative battles over climate regulations, union rights, and Medicaid expansion under the 2010 Affordable Care Act. If Koch seminar donors aim to influence the Republican Party and its governing agendas,

they have gotten good bang for their big bucks in many arenas. This is true even though Donald Trump, the 2016 presumptive Republican presidential nominee, is not a Koch network favorite and espouses at least some policy positions (e.g., on immigration) at variance with Koch network preferences. Trump aside, Koch preferences continue to shape GOP Congressional agendas and election platforms in state and Congressional contests.

What about the impact of consortium-orchestrated donations on the U.S. political left? Are Democracy Alliance partners achieving their own, quite different political goals? Clearly, the funds and other resources deployed through DA pale next to the much larger sums of money and sets of organizational resources supported by the Koch consortium (especially when we take into account seminar pledges to all kinds of Koch organizations, including think tanks and educational foundations as well as Freedom Partners and the political operations it funds). Furthermore, at first glance, DA's approach to funding – scattering modest grants to ever-larger numbers of center-left organizations – seems a formula for weakness compared to the Koch approach of concentrating donated funds on a small number of tightly interlocked organizations.

Nevertheless, Democracy Alliance leaders appear to define their mission differently than Koch network leaders. For DA leaders, the goal seems to be to spark and help coordinate a broader progressive movement populated by a large number of organizations, causes, and projects. Our project has more to learn about what this means and why DA leaders think their funding approach is effective. In addition, whatever DA leaders intend to do, their funding approach may very well influence the goals and activities of many organizations operating on the U.S. center left, including in indirect and unintended ways (see Teles 2013 for suggestions along these lines). By spreading grants to large numbers of specialized groups that must continually prove their unique worth, the DA funding

approach, like the funding strategies followed by many foundations, may unintentionally spur fragmentation and raise civic overhead costs on the U.S. center left. DA influences on Democratic Party agendas and candidates also need to be analyzed.

Pending further research, we are left with the descriptive irony our investigations have already revealed about these two heavyweight consortia of big money donors in U.S. politics. In pursuit of libertarian and free-market ideals on the right, the tightly choreographed Koch seminars channel donations from wealthy conservatives to a centrally run, highly integrated, and ideologically focused political network. Meanwhile, in pursuit of participatory democracy and greater equality on the left, the Democracy Alliance runs a loosely coordinated marketplace to match variously inclined donors with a cacophony of independently led progressive organizations. Currently, America's two leading political donor consortia are achieving different levels of resource mobilization from politically inclined wealth holders. But the contrasting organizational ways in which they raise and direct funds are probably even more significant for U.S. politics than the differences in the amounts of funding they deploy.

Appendix A.

KOCH CORE POLITICAL ORGANIZATIONS

Ideas

CATO INSTITUTE (1977—): Libertarian think tank.
MERCATUS CENTER (1980–): Based at George Mason University to sponsor libertarian research and education.
CHARLES G. KOCH FOUNDATION (1980–): Family foundation funds research and educational endeavors.

Policy Advocacy

CITIZENS FOR A SOUND ECONOMY (1984-2004): Advocacy and lobbying, some constituency building.
60 PLUS ASSOCIATION (1992–): Advocacy group promoting Social Security privatization, free-market health programs for seniors.
AMERICAN ENERGY ALLIANCE (2008–): Advocacy group opposing cap and trade, promoting Keystone, carbon fuels.
CENTER TO PROTECT PATIENT RIGHTS/ AMERICAN ENCORE (2009–): Advocacy against ObamaCare, health programs.

Donor Coordination

KOCH SEMINARS (2003–): Twice-yearly gathering of wealthy donors to orchestrate support for Koch ideas and political strategies.
FREEDOM PARTNERS CHAMBER OF COMMERCE (2011–): Raises and directs political funding; now runs Koch Seminars.

Constituency Mobilization – for both policy battles and elections

AMERICANS FOR PROSPERITY/ AFP FOUNDATION (2004–): Cadre-led federation for advocacy/elections/constituency mobilization.
GENERATION OPPORTUNITY (2011–): Promotes libertarian policies to young people; runs issue ads.
LIBRE INITIATIVE (2011–): Does community and voter outreach in Latino communities; runs issue ads.
CONCERNED VETERANS FOR AMERICA (2012–): Does constituency outreach and promotes privatization of veterans' programs.

Utilities

THEMIS/ i360 (2010–): Non-profit and for-profit voter data bank and vendor.
AEGIS STRATEGIC (2013–): consulting firm to find and advise pro-free market GOP candidates.

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ENDNOTES

[1] Koch seminar trends are approximate seminar attendance numbers reported in the media (using the higher number for the two seminars in a given year if two different numbers were reported for winter and spring/summer). We do not know if the Koch seminar attendance estimates refer to individuals or to husband-wife pairs. Furthermore, especially in the current period, donors can be formal members of the Koch seminars and Freedom Partners without attending every meeting. Our Democracy Alliance numbers are from an internal DA report and reflect a more institutionalized definition of the yearly numbers of "partner units," which include individuals, two-person family households, and multi-household family clusters. In recent years, up to eight labor unions are also tallied as DA partners. To translate the DA partner trends into something closer to the Koch seminar participant trends, we have used a 1.5 multiplier to approximate as best we can the number of wealthy donor members that likely correspond to the yearly totals of partner units. However, within-consortium trajectories are much more meaningful and reliable than the absolute levels, given data uncertainties and divergent definitions.

[2] In very recent years, the Democracy Alliance has started adding to its membership once again, enrolling institutional partners and allies as well as net increments of individual partners. Such membership growth in turn has boosted DA's aggregate contributions to recommended organizations on the core list. At the same time, however, the core recommended list of groups has seen many changes and has expanded through the addition of new organizations as well as many new DA-managed special funds focused on supporting state-level political groups (Democracy Alliance 2015a, 2015b; Gold 2015). By 2015, the full array of highly recommended core DA organizations and funds stood at 44, a longer list than ever before – and another 133 groups also appeared on the 2015 version of the DA's "progressive infrastructure map," any of them fair game for DA partners looking to fulfill their $200,000 annual pledge commitment.

[3] These organizations include all of those listed in Appendix A plus the Institute for Humane Studies, which the Kochs started supporting decades ago, and the Center for Shared Services, which was set up in 2011 to provide personnel and other services to other Koch organizations.