



# Political Fundraising

“Donors don’t give to institutions. They invest in ideas and people in whom they believe.”

*- G.T. Smith*

[www.bhsfundraising.com](http://www.bhsfundraising.com)

1010 Vermont Avenue, NW, Suite 814, Washington, DC 20005 | p: 202.547.5797 | f: 202.547.2892

# Overview of Presentation

- The Fundamentals
- Fundraising Overview
- Fundraising Tools
- Materials
- Mechanics
- Rules and Regulations
- Staff Structure

# Fundraising Fundamentals

## Marketing Strategies

- The Candidate
  - Know what you are working with
- Target Prospects
  - Building your fundraising list
- Research Tools
  - Be resourceful

# The Candidate “The Product”



- Why are you running?
  - Know this answer in and out
- Assess Strengths and Weaknesses
- Your Fundraising Message / Marketing Message
  - Who are you? Why can you win? Why are you better than the alternative?

# Target Potential Donor Prospects

## Time vs. Money



1. Personal friends, family, and close professional colleagues.
2. The Power Circle
  - Individuals that have a financial relationship with you. (This group gains a great deal when you win.)
3. Prospects that share your ideological view
  - Where is your low hanging fruit?
4. Prospects that have an ax to grind with your opponent.



# Resources for Research

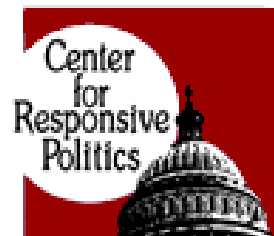
- Key research websites

- [www.tray.com](http://www.tray.com)
- [www.opensecrets.org](http://www.opensecrets.org)
- [www.followthemoney.org](http://www.followthemoney.org)



- Go to your Secretary of State's website

- Links to election commission section



- The Yellow Book Leadership Directory

- [www.leadershipdirectories.com](http://www.leadershipdirectories.com)

- Big Donor Lists

- [www.fortune.com](http://www.fortune.com)
- [www.forbes.com](http://www.forbes.com)

FORTUNE

Forbes  
com

# Fundraising Overview

## Marketing Plan

- Finance Plan
- Fundraising Tools
- The Mechanics
- FEC and State Regulations
- Finance Department Structure

# Finance Plan

## Why it is important

- **Provides organization** – a detailed fundraising plan creates organization and order in the chaotic world of campaign finance.
- **Defines responsibilities** – a fundraising plan determines who does what, and adds accountability to your fundraising campaign.
- **Sets deadlines and goals** – a good fundraising plan tells you when you need the money. Deadlines and goals help motivate your team to perform.
- **Provides a credible fundraising tool** – your fundraising plan shows why you need the money and lets potential donors know you are serious about winning the election.
- **Measures progress** – a detailed fundraising plan lets you measure your fundraising progress, thus allowing you to make needed adjustments before it is too late.

# Finance Plan Template

EVENT	DATE	LOCATION	TIME	HOST	Goal	Cmnt	IN	Out
<b>September, 2007</b>								
Individual Event 1								
PAC Event 1 (Industry Specific - only for Federal races)								
Non-Federal Corporate Event 1 (Industry Specific - only for non-Federal races)								
Individual Event 2								
PAC Event 2 (Industry Specific - only for Federal races)								
Non-Federal Corporate Event 2 (Industry Specific - only for non-Federal races)								
Prospecting Meetings (all month)								
Internet Fundraising								
Call Time (15 - 30 hours)								
Direct Mail								
<b>TOTAL</b>								

# Fundraising Tools

- Personal Solicitation by candidate and surrogates
- Call Time
- Finance Committee – Finance Leadership
- Events
- Internet Fundraising
- Direct Mail, E-mail, & Phone Solicitation
- Marketing Materials
- Grassroots Fundraising
- PAC Solicitation

# Fundraising Tools

## Personal Solicitation

- Call Time – Turn your time into money
- Finance Committee
- Follow Up – Stay in touch and build relationships

*“The deepest principle in human nature is the craving to be appreciated.” – William James*

# Fundraising Tools

## Call Time

- Give them an update
- Make your case
- Make your ask
  - To raise money, you have to ASK for money
  - Ask for More than You Think You Can Get
  - Get a firm commitment
  - Thank them and repeat the commitment
- The Follow Up

# Fundraising Tools

## Finance Committee

- **Benefits**

- Increases Ability for Outreach – opens doors
- Decreases Pressure on Candidate's Time

- **Tips**

- Recruit Committee Members Carefully
- Treat each member like YOU would like to be treated
- Give members the recognition they deserve
- Play it straight with members – they are your kitchen cabinet
- Give them specific goals
- Ask them to schedule CALL TIME as well

# Fundraising Tools

## Follow Up

- Each candidate / surrogate call should be followed up on
  - Email follow up
    - Invitation / Contribution card
    - Marketing information
  - Staff follow up call
- The candidate should keep in touch with key people in the campaign
  - Weekly conference calls

# Fundraising Tools

## Events

- Cultivates Donors
- Gives an Excuse to Contribute
- Set a Realistic Event Ticket Price
- Set a Realistic Budget
- Set a Realistic Fundraising Goal
- Coordinate the Timing of the Event
- Look for a Significant Draw
- Pay up Front
- Allow Time to Plan
- Be Creative

# Fundraising Tools

## On-line Fundraising

- **Design Your Website Right**
  - Make it easy to maneuver
  - Provide constant updates
  - Remember – the website is a 24 hour / 7 day a week / 365 day a year representation of your campaign and candidate
- **Fill it to the Brim**
- **The Purpose of Your Site**
  - Collect information
  - Inform voters
  - Raise money
- **Contacts**
  - Collect information on your visits to solicit contributions
  - Add the email addresses to your prospect list
- **Be proud of your site and advertise it**
  - Every sign, every pamphlet, every speech should mention the site

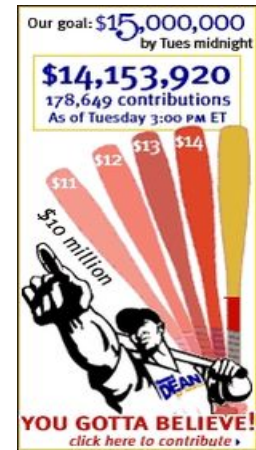


# Fundraising Tools

## On-line Fundraising

How to raise money through the website

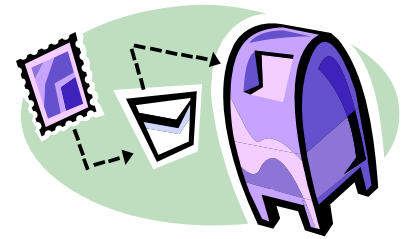
- First visit contributors:
  - [“CLICK HERE TO CONTRIBUTE”](#)
  - Make it simple and easy to give
- Multiple visit contributors:
  - Informative email blasts to individuals with links to contribute
  - “Break the bat” – The Dean method of motivation
  - End of quarter contributions



# Fundraising Tools

## Direct Mail & E-mail

- Re-solicit existing donors versus cold prospecting of new donors.
- Follow up on invitations to events and meetings.
- Solicit direct donations.
- Follow up on outstanding pledges.
- Direct Mail vs. E-mail



# Fundraising Tools

## PAC Solicitation

- There are over 4,000 federally registered political action committees
- Ideological Partners
  - Who would be interested in your campaign?
- Incumbent vs. Challenger
- How to Target?
  - Letter of Introduction
  - Follow up phone calls



# Marketing Materials

Have them ready and pass them out

- Press Clips
- Research findings
- Biographical pieces
- Polling Information
- List of Accomplishments
- “How We Can Win” Memo

# The Mechanics

## Monitoring Income Projection vs. Actual Receipts

- Prospecting Chart
  - Prospecting Timelines – plan ahead for the upcoming quarter
  - To track potentials
- Weekly Cash flow Projection & Contribution Trackers
  - Stay organized – know your money and your systems inside and out
  - Record keeping – copy every check

# The Mechanics

## Organization

- Databases
  - i.e. NGP, Aristotle, Democracy in Action
  - Track contributions, pledges, volunteer info, etc.
  - Once created, your database is your greatest asset
- Organization systems
  - Spreadsheets – keep on template



# FEC and State Regulations

## KNOW THE LAW

- Hire a compliance lawyer and trust them
- Obtain all legal advice in writing
- Know your state regulations and reporting deadlines
- Hire firm to handle all filing requirements
- In-kind contributions
  - Great way to save on cost



# Finance Department Structure

- National Finance Director
- In-state Finance Director
- Deputy Finance Director
- Finance Assistant
- Call Manager
- Finance Consultant – Senior Advisor

# Conclusion

- Think outside of the box
- Brainstorm with your staff and candidate
- Knowledge, confidence, organization and practice will make your candidate and campaign more successful

*If you have any question, please do not hesitate to contact me at  
Berger Strategies – (202) 547-5797*