

# EDF ACTION CAMPAIGN ACADEMY

EDF  ACTION  
Advocacy partner of Environmental Defense Fund

CAMPAIGN ACADEMY



# POLITICAL FUNDRAISING

EDF  ACTION  
Advocacy partner of Environmental Defense Fund

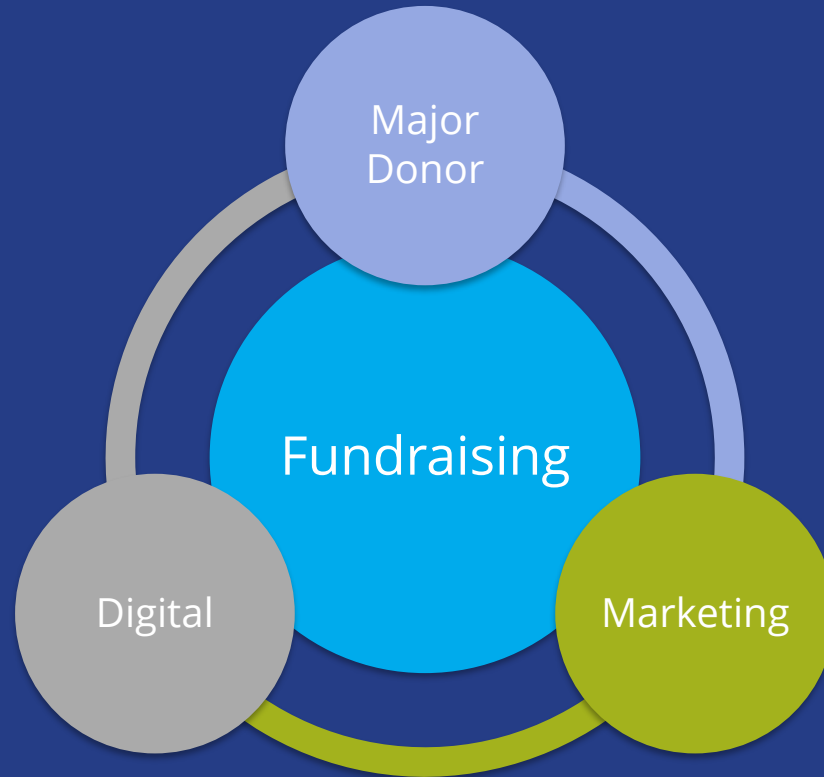
CAMPAIGN ACADEMY

## AGENDA FOR THIS MODULE

1. Types of Fundraising
2. Make a Fundraising Plan
3. Organize & Operationalize:  
Setting up Fundraising  
Systems
4. Fundraising Best Practices



# FUNDRAISING TACTICS & TOOLS



# FUNDRAISING TACTICS & TOOLS

## Major Donor

Event based

Call time

Finance Committee /  
program

Grassroots

## Digital

Email

Online ads

Social Media

## Marketing

Direct Mail

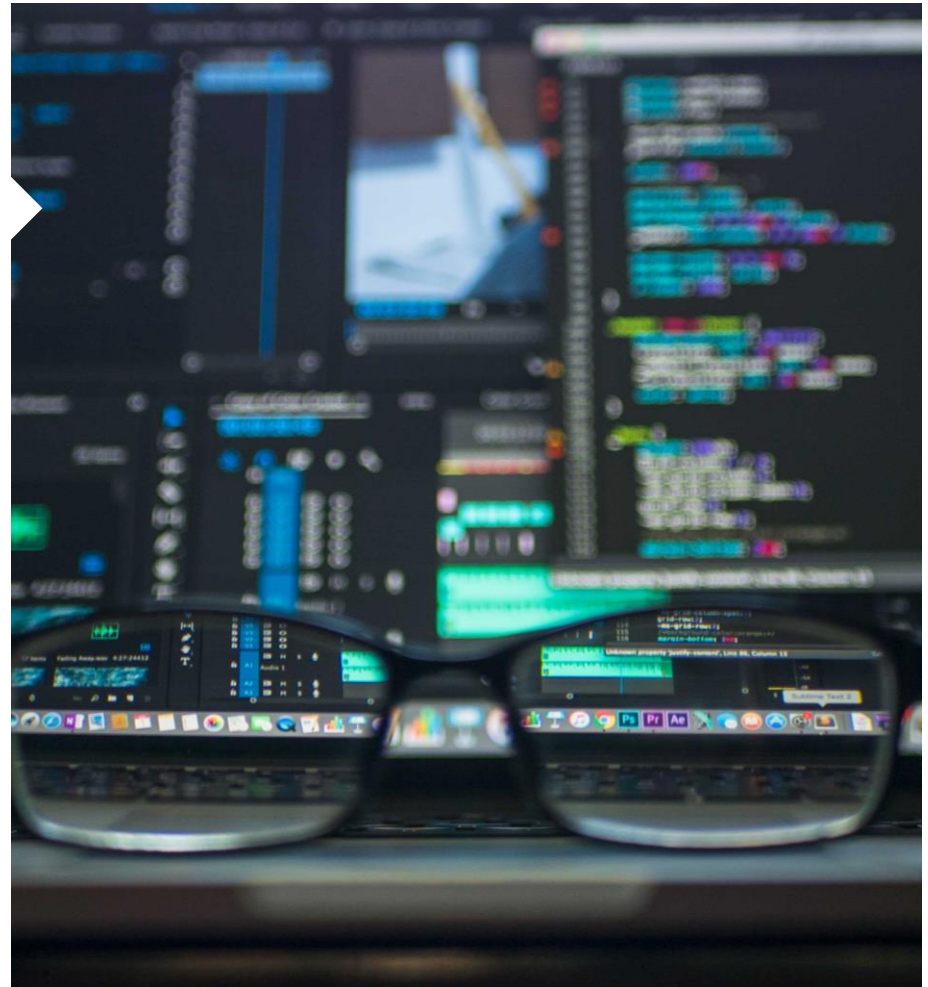
Store

Telemarketing

Canvassing

## ORGANIZE & OPERATIONALIZE: FUNDRAISING SYSTEMS

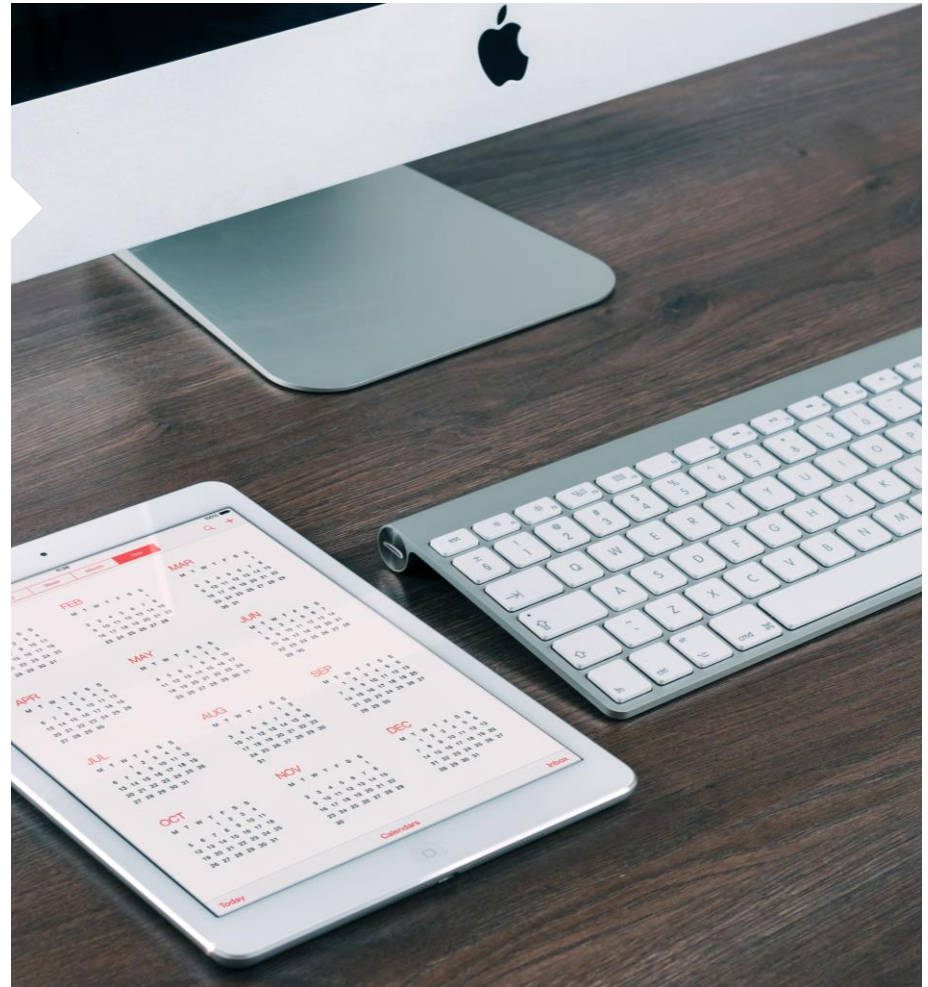
1. Setting your plan for fundraising success
  - Fundraising Tactics & Tools
  - Determine your fundraising goal
  - Manage Expectations
2. Organize your network & correspondence
3. Tracking commitments and follow up
4. Systematic prospecting
5. Create community & engage





# CREATING YOUR FUNDRAISING PLAN

1. Planning and Budgeting
  - Work backwards first
  - Start with necessary expenses and map a plan to get there
2. Map Your Network
3. Review tools & relevant fundraising prospects/networks that can be utilized
4. Always set direct & realistic expectations
5. Continuous Engagement, Track Asks & Follow Up



# SETTING YOUR BUDGET: GOALS AND FINANCE PLAN

		General Budget		
BUDGET ITEM	ITEM DESCRIPTION	Budgeted	Spent	Left
<b>CAMPAIGN MANAGEMENT AND STAFF</b>				
Field Director (Melissa)	\$2,500/month	\$5,000.00	\$0.00	\$5,000.00
Finance Assistant (Ana)	\$1,500/month	\$3,000.00	\$0.00	\$3,000.00
Scheduler (Arthur)	\$750/month	\$1,500.00	\$0.00	\$1,500.00
Insurance	2 people on healthcare	\$2,000.00	\$0.00	\$2,000.00
Reimbursements	Melissa \$150, Ana \$100, Arthur \$52.5	\$600.00	\$0.00	\$600.00
Payroll Tax				
<b>TOTAL CAMPAIGN STAFF</b>		<b>\$12,100.00</b>	<b>\$0.00</b>	<b>\$12,100.00</b>
<b>COMMUNICATIONS</b>				
Email service (Streamsend.com)	\$100/month * 2 months	\$200.00	\$0.00	\$200.00
Direct Mail	3 pieces * 80,000HH * \$.42/piece	\$100,000.00	\$0.00	\$100,000.00
Newspaper Ads	Varying ad sizes in weeklies	\$10,000.00	\$0.00	\$10,000.00
Robocalls	150,000 dials*.06/call	\$9,000.00	\$0.00	\$9,000.00
Palm Cards/Doorhangers	10,000 total	\$1,500.00	\$0.00	\$1,500.00
<b>TOTAL COMMUNICATIONS</b>		<b>\$120,700.00</b>	<b>\$0.00</b>	<b>\$120,700.00</b>
<b>HEADQUARTERS</b>				
Store Front Space	\$850/month * 2 months	\$1,700.00	\$0.00	\$1,700.00
Phones & Internet		\$300.00	\$0.00	\$300.00
Supplies	paper/toner/clipboards/etc.	\$750.00	\$0.00	\$750.00
Utilities	heat/electricity/ect.	\$400.00	\$0.00	\$400.00
Postage	postcards, office and event mail	\$3,000.00	\$0.00	\$3,000.00
<b>TOTAL FOR HQ</b>		<b>\$6,150.00</b>	<b>\$0.00</b>	<b>\$6,150.00</b>
<b>VISIBILITY</b>				
Window Signs and Foldover Placards		\$2,500.00	\$0.00	\$2,500.00
<b>TOTAL VISIBILITY</b>		<b>\$2,500.00</b>	<b>\$0.00</b>	<b>\$2,500.00</b>
<b>EVENTS</b>				
Venue		\$1,000.00	\$0.00	\$1,000.00
Food and Drink		\$2,000.00	\$0.00	\$2,000.00
Event Mail		\$1,000.00	\$0.00	\$1,000.00
<b>TOTAL EVENTS</b>		<b>\$4,000.00</b>	<b>\$0.00</b>	<b>\$4,000.00</b>



# SETTING YOUR BUDGET: GOALS AND FINANCE PLAN

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<b>GOTV</b>				
GOTV		\$10,000.00	\$0.00	\$10,000.00
<b>TOTAL GOTV</b>		<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$10,000.00</b>
<b>MISC.</b>				
Misc.		\$2,500.00	\$0.00	\$2,500.00
Sales Tax		\$1,000.00	\$0.00	\$1,000.00
<b>TOTAL MISC.</b>		<b>\$3,500.00</b>	<b>\$0.00</b>	<b>\$3,500.00</b>
<b>TOTAL BUDGET</b>		<b>\$158,950.00</b>	<b>\$0.00</b>	<b>\$158,950.00</b>
<b>COH</b>		<b>\$0.00</b>		
<b>NEED TO RAISE</b>		<b>\$158,950.00</b>		

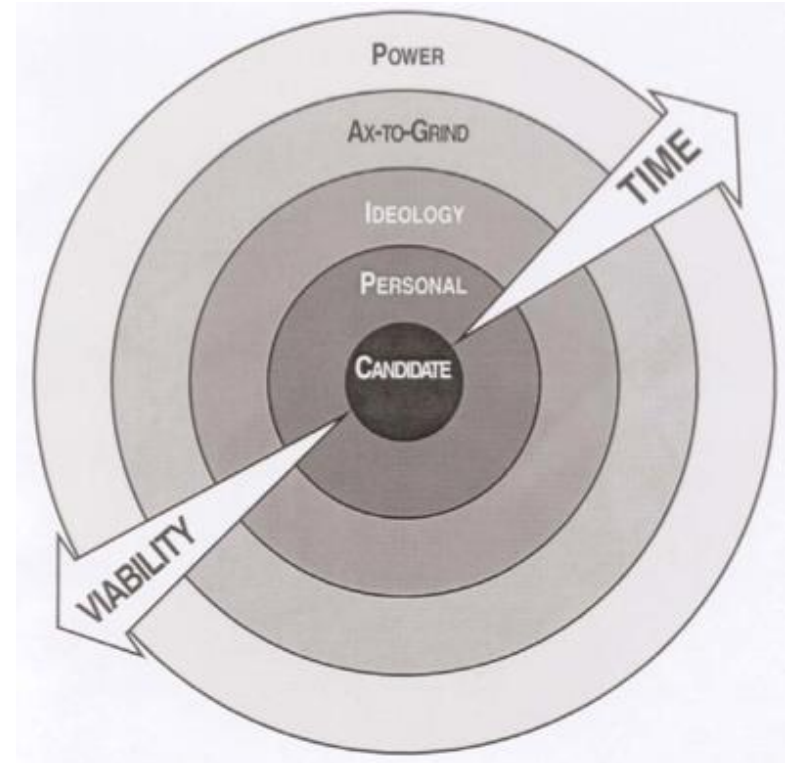
# FINANCE PLAN SAMPLES

Finance Plan

2010 event scheduled	Event	Soft	Hard	Inhand	Called	Notes	Contact Email	Phone
	Friend #1		\$ 2,500.00					
	Friend #2		\$ 2,500.00					
	Friend #3		\$ 2,500.00					
	Friend #4	\$ 2,500.00	\$ 2,500.00					
	Friend #5	\$ 2,500.00	\$ 2,500.00					
	White Event		\$ 2,500.00					
	Smith Event	\$ 2,500.00	\$ 2,500.00					
	Blue Event		\$ 5,000.00					
	Womens Event	\$ 5,000.00	\$ 10,000.00					
	South End Event		\$ 2,500.00					
	Lee event	\$ 5,000.00	\$ 2,500.00					
	<b>Call Time</b>	<b>\$ 5,000.00</b>	<b>\$ 7,500.00</b>					
	<b>Direct Mail</b>	<b>\$ 500.00</b>	<b>\$ 2,000.00</b>					

Soft	Hard	Inhand
<b>\$32,000.00</b>	<b>\$69,500.00</b>	<b>\$ -</b>

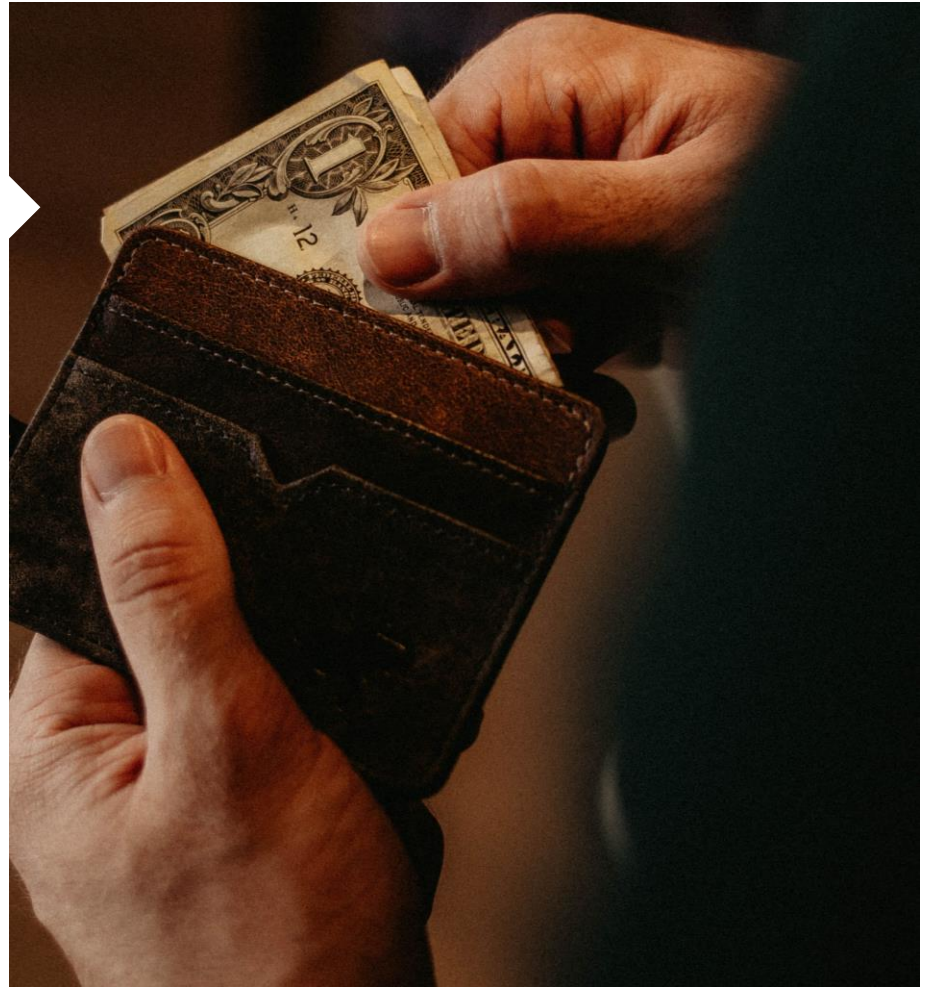
# Mapping Your Network: Circles of Benefit



*c/o EMILY's List Making the  
Dough Rise Manual*

## FUNDRAISING TACTICS & TOOLS

1. Event based Fundraising
2. Personal Ask: Calls & Individual Meeting
3. Empower your network
  - Finance Committee & Leadership
4. Get creative
  - Direct Mail / Telemarketing
  - Online Fundraising Programs
  - Recurring or matching gifts





# INVITE SAMPLES

Jim O'Leary • John Fitzgerald • Jack Harrington • Hank Mulhern

Cordially invite you to an evening reception with

**Governor Deval Patrick**

Thursday, September 16, 2010  
Intercontinental Hotel  
510 Atlantic Avenue  
Boston, Massachusetts

4:30 p.m. – 6:30 p.m.

\$250 \$500

To RSVP, please contact Kendra Foley at 617-367-2010  
or by email at [kfoley@devalpatrick.com](mailto:kfoley@devalpatrick.com)

You may also RSVP and make your contribution online at  
[www.actblue.com/page/september16](http://www.actblue.com/page/september16)

Join us for an event in support of

★ **ERIC LESSER** ★

FOR STATE SENATE

**The Home of Bettylu and Paul Saltzman**

415 East North Water Street #605  
Chicago, Illinois 60611

**WEDNESDAY, JULY 9<sup>th</sup>**  
6:00 PM

**CO-HOSTS**

Sally Armbruster • Susan and David Axelrod • Natalie Bookey-Baker • Mark Beatty  
Stephen Brokaw • Meaghan Burdick • Jon Carson • Lizzie Cohen • Jamie-Clare Colvin  
Fred Eychaner • Kathy Gasperine & Brad Egan • Peter Giangreco • Larry Grisolano  
Betsy Hoover & Jeremy Bird • Robin & Austan Goolsbee • Rick Jasculca • John Kupper  
Allyson Laackman • Kyle Lane • John Levi • Harrison Mackler • Samir Mayekar  
Sophie McCarthy • Coral Negron • Lizzie Nelson • Peter Newell • John Oxtoby  
Lee Rosenberg • Eric Sedler • Susan Sher • Roz Skozen • Alan Solow • Jim Terman  
Matthew Tully • Andrew Wernick

*(Host Committee in Formation)*

**DONATION  
PER ATTENDEE**

Co-Host: \$500  
Supporter: \$250  
Guest: \$150

Checks payable to the "Lesser Committee"  
or donate online and RSVP at [bit.ly/LesserJuly9th](http://bit.ly/LesserJuly9th)

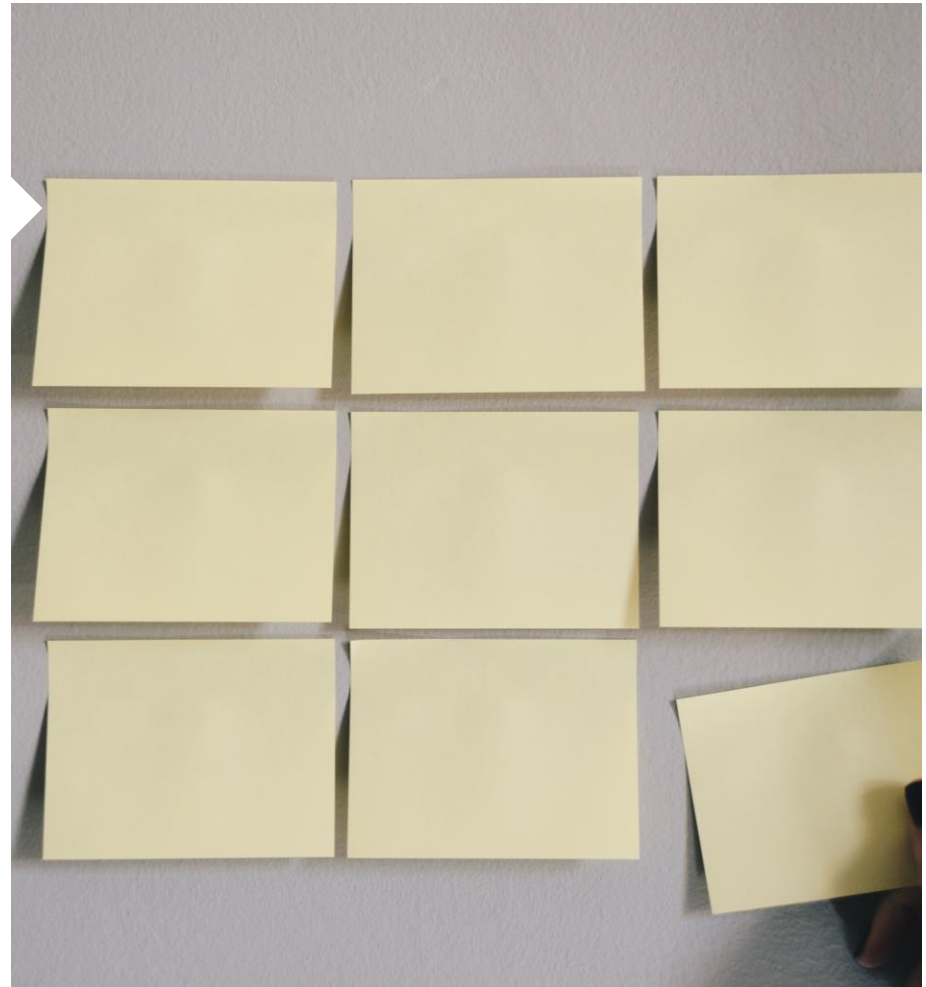
PAID FOR BY THE LESSER COMMITTEE • WWW.ERICLESSER.COM  
JESSICA ELIN, TREASURER • P.O. BOX 450, WILBRAHAM, MA 01095

# Sacred Call Time & Outreach



## MAKE IT EASY AND ORGANIZED: FUNDRAISING SYSTEMS

1. Prospecting and tracking correspondence
2. Your fundamentals- Educate and Activate
  - One Pager on Who & Why
  - Contribution Instructions
3. Recording commitments & contributions
4. Build a community of support
5. Thank You Notes & Personal information tracking



# ONE PAGER SAMPLE

## Bill Owens *for Congress*



Checks can be made payable to  
**Bill Owens for Congress**  
FEC ID C00464495  
P.O. Box 1575  
Plattsburgh, NY 12901  
<http://www.billowensforcongress.com>

### Open Seat Special Election in NY-23

#### Bill Owens Biography

Bill Owens has devoted his life to creating jobs, bringing economic development to the North Country, and serving his country. Bill Owens is an Air Force veteran who served as a JAG Officer at the Plattsburgh Air Force Base. And while politicians have talked about creating jobs, Democrat Bill Owens has spent his career doing the actual work. Bill is a North Country community leader who helped bring over 2,000 jobs to the region by leading the redevelopment of the Plattsburgh Air Force Base and helping recruit businesses from Canada to Upstate New York.

#### Bill Owens is in a Strong Position to Win

- Bill Owens was the unanimous choice of all eleven Democratic Party County Chairs in the district as the strongest candidate for the 23<sup>rd</sup> district.
- President Obama's win in this swing district shows this district is trending Democratic. His message of strengthening our economy resonates with the voters and is echoed by Bill's professional experience.
- A strong Conservative candidate has entered the race, building a professional campaign that is likely to draw critical base votes away from the Republican candidate.

#### Bill Owens has the Right Approach for the District

- Bill Owens is not a career politician. Like Scott Murphy, he's a private citizen whose campaign has been fueled by New Yorkers who recognize his ability to drive economic growth within the community.
- Bill Owens has lived and worked in Plattsburgh for decades, serving on the Air Force Base, on numerous community and civic boards, and working towards economic development and job creation.
- Bill's campaign has been supported by a visit from Vice President Biden to upstate New York and he has received the early endorsement of both Senator Schumer and Senator Gillibrand.

#### Political Background

Congressman John McHugh has been confirmed by the Senate as Secretary of the Army. Governor Paterson must issue a proclamation declaring a special election to take place between 30 - 40 days of his announcement. President Obama won this district with 52.6% of the vote which indicates that a strong candidate with the right message can make this a competitive race.

#### Giving Information

Contributions to Bill Owens for Congress count against 2010 contribution limits. Checks can be written for the Special Primary, Special General and Primary 2010 elections.

Paid for by Bill Owens for Congress





# CONTRIBUTION INSTRUCTION SAMPLE

Yes, I/we will attend the April 26 event with Governor Patrick...

No, I/we will not be able to attend...

...and enclosed is my contribution for \$ \_\_\_\_\_, made out to the "Deval Patrick Committee"

\*Name: \_\_\_\_\_

\*Home Address: \_\_\_\_\_

Home City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

\*Occupation: \_\_\_\_\_

\*Employer: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_ Amount: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Signature: \_\_\_\_\_

**Event/Host: April 26/Hamersleys**

\* Required by Massachusetts Campaign Finance Laws

Please mail checks to:

**Deval Patrick Committee**  
**56 Roland Street, suite 206**  
**Charlestown, MA 02129**

To make a secure donation online, go to:

<http://www.actblue.com/page/devalpatrick-hamersleys>

The Deval Patrick Committee (the "Committee") can accept individual contributions of up to \$500.00 in a single calendar year. Campaign finance laws prohibit the use of money orders or cash in excess of \$50 for campaign contributions. Contributions and gifts to the Committee are not tax deductible for federal and state income tax purposes. Campaign finance laws prohibit contributions from corporations. Campaign finance laws limit annual contributions to a single campaign committee from a Massachusetts-registered lobbyist to \$200.00.

Paid for and authorized by the Deval Patrick Committee. Designed in-house. Labor donated.

# FOLLOW UP SAMPLE

Dear Friend,

It was great to briefly speak with you today. Thank you again for your generous contribution of \$500 to the Committee to Elect Kathryn Burton; I appreciate your support of my campaign.

Contributions can be made online [here for the dinner](#) or by using the attached contribution form. Please note the maximum contribution per calendar year to my campaign is \$500 per person. Please note that checks should be made payable to the "*Committee to Elect Kathryn Burton*" and mailed to the Kathryn Burton, PO Box 130224, Boston, MA 02113.

Please let me know if you have any questions or would like additional information about my campaign. Thank you again for your generous support and friendship.

Best,  
Kathryn

# THANK YOU SAMPLE

Mr. and Mrs. John Doe  
123 Main Street  
Hanover, New Hampshire 03755

Dear Joe and Jane,

I would like to thank you for your continued friendship and support, as well as for your recent generous contribution to the DNC.

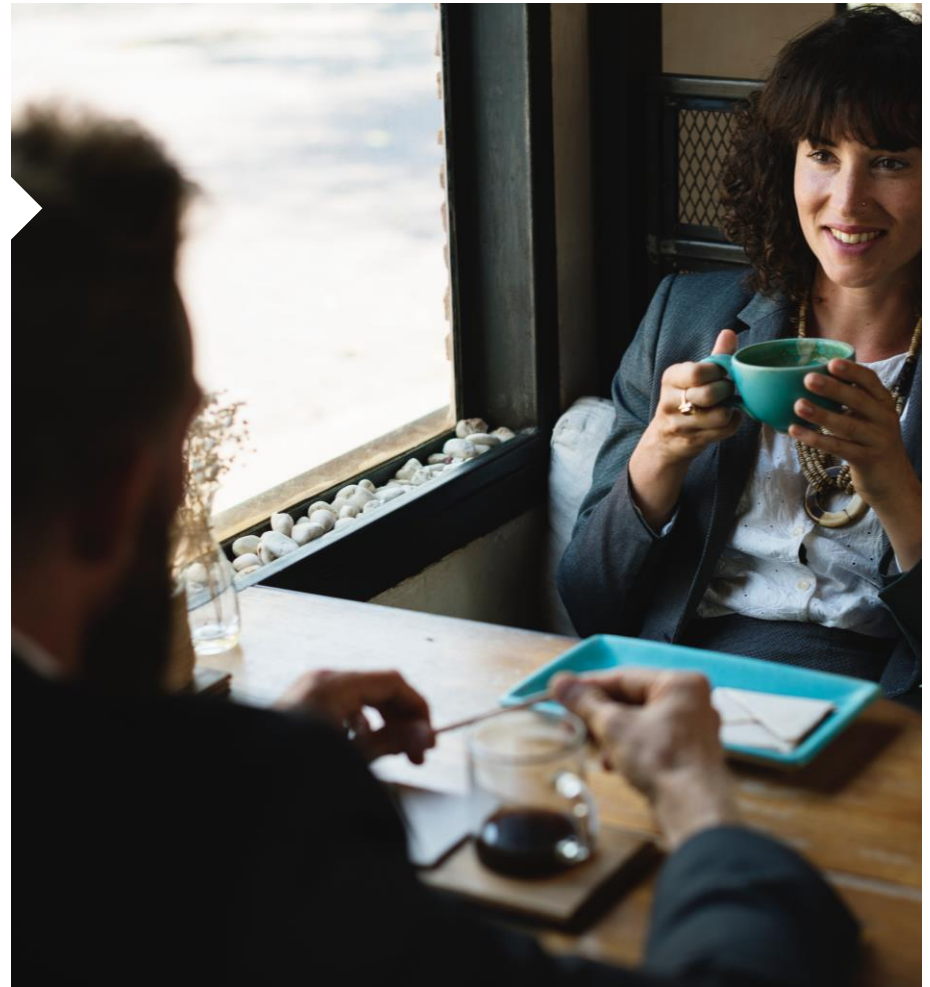
At this defining moment in our nation's history, your contribution to the Democratic Party could not be more crucial. Through the DNC and Organizing for America, we are leading the effort to promote the White House's policies and enact meaningful change. Thanks to your help, we are gaining ground with President Obama's strong and proactive vision to move our country forward. Your commitment to the DNC is also critical to the success of Democratic candidates across the country, ensuring that progress is seen at all levels of government.

You have my sincere gratitude for your support.

Best Regards,  
Governor Tim Kaine  
Chairman

## NOT JUST ANOTHER DONOR: BEST PRACTICES TO ENGAGE SUPPORTERS

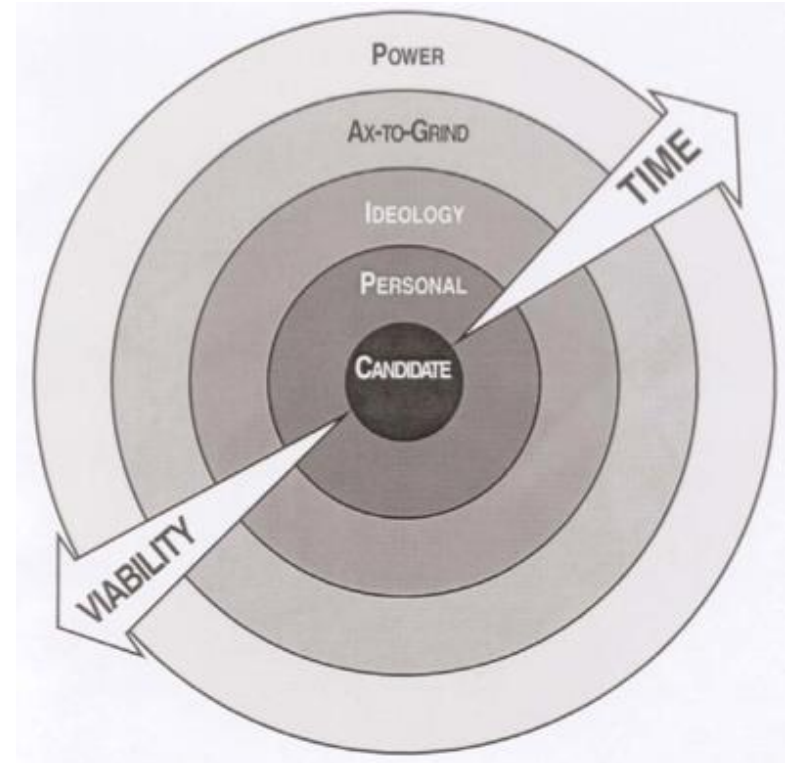
- Invite to a local event
- Ask to volunteer their time
- Ask them to host & leverage their networks
- Serve as a public validator
- Learn about their personal motivations & interests
- Build a personal relationship & community





# **EMBRACING THE FUNDRAISING ASK**

# Mapping Your Network: Circles of Benefit



*c/o EMILY's List Making the  
Dough Rise Manual*

# CONTINUUM OF YES

No

- *Thank you for your consideration. I appreciate your continued guidance and friendship...*

No, Not now

- *...Thank you. I know you lend your time and resources to many great causes so I appreciate your limits on getting involved now. I would love to add you to my \_\_\_ list and will keep you updated on future opportunities.*

Maybe

- *...Thank you. Let me send you some further information about the organization. I would love to connect you with.... As I mentioned, I need more validators in the business community and would love to count on your advice*

Yes

- *...Thank you. You are an amazing advocate/friend/\_\_\_\_. Ill send you an email on how to donate today. This is going to help me fund \_\_\_\_\_. I appreciate your investment in this great cause and I know you will also be proud of the work \_\_\_\_\_ does.*

## GAIN CONFIDENCE: MAKING THE ASK

- Rule #1: Embrace where the contribution is going and what it will produce
- Rule #2: Know Your Audience  
who + motivation + capacity  
+ history= appropriate ask
- Rule #3: Listen



## PRACTICE MAKES PERFECT: PERFECTING THE ASK

- Know Your Audience (Personalize)
- Pick an Effective Attitude (Listening required)
- Build Urgency
- Be Direct
- Ask for Something Specific
- ...PAUSE... for a response
- Follow up & engage beyond contributions





## PRACTICE MAKES PERFECT: PERFECTING THE ASK

- Have 15-20 second clear pitch-  
express why you are involved and why  
you are approaching this individual
- Be direct; ask for specific amounts
- Leave a number where you can be  
reached
- Take diligent notes and keep records
- Send immediate and specific follow up
- Call to check in - without an ask
- Be Gracious



## GUIDE THE CONVERSATION

- Ask questions about what the supporters cares about
- Look for shared interests and commonality
- Share your personal story
- Give concrete accomplishments
- Share how funds will be used
- Share what we do together
- Larger fundraising goal or context
- Join the team



**THANK YOU**