

“Learn to Fish”

FUNDRAISING TO WIN

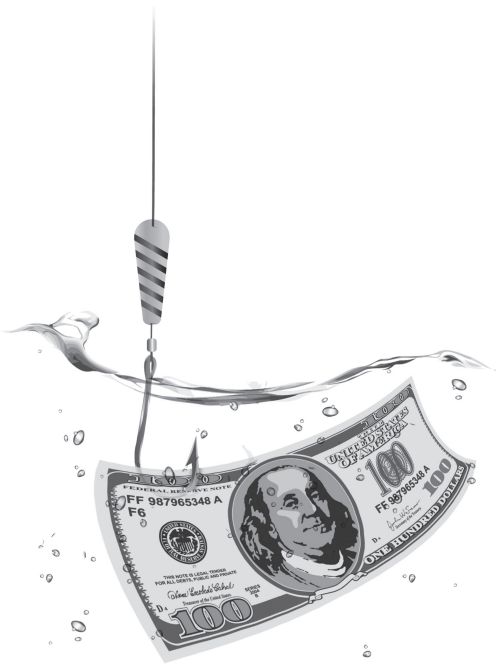


FUNDRAISING GUIDEBOOK for
DEMOCRATIC ORGANIZATIONS



CALIFORNIA
DEMOCRATIC
PARTY

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INTRODUCTION TO FUNDRAISING

Fundraising is the engine that drives any successful political endeavor. While it can seem like a somewhat daunting process, the reality of fundraising is simply the basics of making an “ask,” and working the response rather than passively awaiting one. It is like any other sales pitch; a crafty message for an interesting or useful product will be more successful than a boring, lackluster product with little advertisement. Bottom line – the democratic organization has a slate of “products” and the message you are promoting is, “We can win.”

Successful fundraising starts with a sense of urgency and a core belief in the ideals of your Democratic committee or club. If the money won’t or can’t make a difference in electing Democrats locally, statewide or nationally, than what is the actual motivation for the donor to give? Some may still give out of friendship, loyalty or even guilt. However, the message that, yes, these funds will help us WIN, is actually the key motivation for a donor to participate.

This manual seeks to break down the mechanics of developing and implementing a fundraising strategy for your organization, and it attempts to show how simple the process can be when executed with a few easy steps. From writing a plan, designing the pitch, planning an event, and bolstering the efforts of your endorsed candidates, this guidebook will illustrate how Democratic organizations can utilize winning tactics and raise more funds than ever before.

Lastly, this guidebook seeks to dispel the notion that fundraising is difficult or something to be feared. By imploring the basic fundraising principles, everyone will be able to move forward with an effective effort.

GETTING STARTED

Getting started is the most difficult part of fundraising. It’s really about determining what you want to achieve as an organization, and then establishing and developing the mechanisms to reach those goals. You must assess the strengths and weaknesses, and the needs and wants of your organization before you can write and implement the overall plan and strategy.

The best way to start out is by making an overall assessment of your organization. While the answers will be different for each organization, the basic questions are the same:

1. What is the mission of our Democratic Organization?
2. Based on our size, what is the structure of our organization?
3. What are the expectations of our members, and how will they be met?
4. What is the financial need and goals of the organization?
5. What is the timing of the need?
6. What are the legal questions that must be considered?
7. Who will be the point person for the fundraising effort?
8. How can we establish a fundraising committee to support the point person?
9. Are there staff or volunteers that can offer reliable help?
10. How do we build and maintain our database of members and contributors?

Consideration of each question individually will allow your group to establish parameters for fundraising, determine what you collectively envision for the organization, and how fundraising will help you achieve your overall goals.

DETERMINE THE ORGANIZATION'S MISSION

When you started or joined the organization, you knew it was formed to help Democrats. That being said, each election cycle brings different opportunities and challenges in achieving your overall objective. For any upcoming political cycle, you will need to determine the main objective of your organization. For example, are you most interested in helping the State Legislative leaders maintain their majorities despite an open-primary environment? Is the organization simply focused on electing Democratic Women throughout California? Or is there just one Assembly race that means the most to your group?

All of these are important, and much needed to fill a niche in your local political environment. However, what must be determined from the outset is a clear mission, and if it's all of the above, that's great too. But, you have to come up with the hook, the answer to the question: "What will you do with the funds you raise in order to specifically help Democrats?" Once you gather the answer, you will have your mission.

STRUCTURE OF THE ORGANIZATION

Structure is wholly determined by the charter of your organization and how you will use that charter to achieve the goals put forth through your mission. You may have a President or Chair who will do the lion's share of the fundraising, or you may have a board who will share in the effort. Determining the structure, and the accountability within that structure, will help alleviate confusion and create a shared responsibility to achieve the goal of your mission.

EXPECTATIONS

The expectations game is one that can make this process challenging and can be difficult to overcome when a well-intentioned organization sets unrealistic goals or does not have a clear mission. This can be easily overcome by putting together a clear mission, a structure, and a realistic goal at the outset, making it easier to meet and exceed the expectation of the membership and the overall Democratic community. For example, if your goal is to elect Democratic women to the State Senate, and you have determined there are two races where you can make a difference, that allows you to create a structure to fundraise for that mission, determine a clear way to legally assist those campaigns, and set an expectation to meet and possibly exceed those financial goals. Determining exactly what you want to do and what you want to raise will strengthen your organization and help you win the expectations game.

OVERALL FINANCIAL NEEDS AND GOALS

Determining the real costs of your mission and a budget for the overall effort will be crucial to your success. If your organization has office overhead, phone line costs, costs to feed volunteers, a paid volunteer coordinator and a paid fundraiser, then your budget needs to include those line items in addition to anything else your group may need to accomplish its goals.

SAMPLE BUDGET FOR A DEMOCRATIC ORGANIZATION

Cash on Hand \$10,000												
Line Item	Jan	Feb	March	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Target to Raise			\$ 15,000.00	\$ 10,000.00	\$ 10,000.00	\$ 15,000.00	\$ 5,000.00	\$ 5,000.00	\$ 25,000.00	\$ 15,000.00		
HEADQUARTERS EXPENSES												
Democratic Headquarters Rental	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Utilities	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 500.00	\$ 500.00	\$ 1,500.00	\$ 2,500.00	\$ 3,000.00	\$ 2,500.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Telephones	\$ 50.00	\$ 50.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 500.00	\$ 200.00	\$ 50.00
Internet	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00	\$ 100.00
Office Manager	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Volunteer Coordinator												
Equipment Rental	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00
Food for Volunteers	\$ 100.00	\$ 100.00	\$ 100.00	\$ 300.00	\$ 400.00	\$ 300.00	\$ 400.00	\$ 400.00	\$ 1,000.00	\$ 1,000.00	\$ 500.00	\$ 100.00
Printed Materials in Support of Candidates					\$ 500.00			\$ 200.00	\$ 500.00	\$ 500.00		
FUNDRAISING EXPENSES												
Fundraising Director	\$ 1,000.00	\$ 1,000.00	\$ 4,000.00	\$ 1,000.00	\$ 1,000.00	\$ 4,000.00	\$ 1,000.00	\$ 1,000.00	\$ 4,000.00	\$ 1,000.00	\$ 1,000.00	
Postage/Printing	\$ 50.00	\$ 500.00	\$ 500.00	\$ 50.00	\$ 500.00	\$ 500.00	\$ 50.00	\$ 1,000.00	\$ 500.00	\$ 500.00	\$ 500.00	
Catering			\$ 1,000.00			\$ 1,000.00			\$ 3,000.00			
Venue Rentals			\$ 1,000.00			\$ 1,000.00			\$ 2,000.00			
Supplies	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	
	\$ 5,500.00	\$ 5,950.00	\$ 11,100.00	\$ 4,850.00	\$ 5,900.00	\$ 11,300.00	\$ 6,950.00	\$ 8,600.00	\$ 16,500.00	\$ 7,300.00	\$ 6,000.00	\$ 3,450.00
Total Projected to Raise with Current COH	\$ 110,000.00											
Projected Expenses	\$ 93,400.00											

FUNDRAISING TIMELINE

Now that you have determined the budget, you can see a distinct timeline showing when and where you need cash. This allows you to foresee cash flow crunches ahead of time, and before they become problematic. The sooner you get started with your fundraising effort, and the more of a nest egg your organization has built up, the better. Preventing a cash flow meltdown should be the main objective. In short, the earlier you set your objectives and start to raise the money, the more funds you will have to help Democrats. The Emily's List's motto, "Early Money is Like Yeast," is a crucial motto to remember.

LEGAL QUESTIONS

One of the most important components of fundraising, aside from actually raising funds, is making sure that you are in compliance with state and/or federal laws pertaining to political contributions. Depending on your mission and the types of campaigns you chose to assist, it is important to be familiar with the laws regarding the receipt of contributions, the limits of those contributions, and what type of committee you will need to form to receive and disburse those funds. While it is a matter of practicality to have knowledge of these laws, it is highly recommended that you hire a professional treasurer to handle the nuts and bolts of the campaign finance component, file your reports, and make sure that all of your actions are legal.

Depending on the type of organization and your organization's mission, these are the questions you may need to address:

1. Should you hire a professional treasurer?
2. How much can your organization receive and/or give?
3. What are the rules for the different kinds of organizations (Central Committee, Democratic Club, etc.)?
4. Do you need to form a Political Action Committee (PAC)?
5. How can you help local, state and federal campaigns? How are they different?

FUNDRAISING POINT PERSON (FINANCE DIRECTOR)

No matter the size or scope of your fundraising needs, your organization must have a point person directing the fundraising effort. This may be a volunteer leader, or for a large-scale effort, a professional fundraiser. The individual you select will be responsible for directing all efforts related to fundraising, inclusive of, but not limited to, ensuring that mailings and emails have gone out, that follow up calls have been made, and all fundraising/event logistics are handled properly. This person will be responsible for achieving your organization's mission and financial goals while directing the fundraising effort. Therefore, it is imperative that your finance director, whether paid or volunteer, is experienced, knowledgeable, and has the time to devote to your efforts.

FUNDRAISING COMMITTEE

Once you have identified a director for your organization's fundraising effort, it is important to enlist a committee of people to help the effort by offering expertise and list building assistance. These people must be willing to help find contributors to make the overall fundraising strategy successful. They also must be willing to make calls and send emails to their colleagues and friends urging their participation in your fundraising events or specific targeted programs. It is important to give committee members clear goals, and to have the finance director spend time delegating and managing the committee while identifying how best each member can contribute their time to bolster your efforts. For instance, you may have a committee member who can help secure a prominent person to speak at your fundraiser, or another committee member who can identify a donated location for an event or phone bank. Another member may own a restaurant that can provide your volunteer food, potentially alleviating a line item in your budget. Above all, and most importantly, you want committee members who have the capability to pick up the phone and enlist monetary commitments and support.

STAFF AND VOLUNTEERS

As you move through the process of building an organization structure and budget, it is important to consider what kind of staff, volunteer or intern help you can get on a regular basis. For instance, are there folks that you can rely on to help with the database or with follow-up phoning for events? It is important to begin establishing a list of volunteers that can be relied upon for quality help. These are people that don't need a lot of hand holding and require little direction. It can be beneficial to put a cadre of your interested members through a small training to help evaluate each person's skill set, and to teach the basic mechanics of fundraising for your specific organization. By investing time in your volunteer base, you can save on overall staff costs while strengthening your internal structure and providing a sense of efficacy to those involved in your organization.

BUILDING AND MAINTAINING THE DATABASE

Your database begins with your membership list. Those who are current members and those who have been members within the last five years will constitute your donor base and should be contacted for any fundraising effort that your organization is engaged in or sponsoring. For instance, a local legislator's annual dinner or a fundraiser planned by your organization is a great way to utilize your member base to bolster the event. However, the key to truly evolving the effort is expanding beyond your current members and donors to affiliates or like-minded Democrats in your area that regularly contribute to candidates and Democratic causes.

SUGGESTIONS FOR EXPANDING YOUR MEMBERSHIP LIST

1. Ask each active member to bring 10 names of new people they think might be interested in getting involved.
2. Ask each endorsed candidate or close elected official for the names of their maxed-out donors (this is someone who has contributed the maximum allowed in the current election cycle) who they think might want to be helpful; this works especially well for events where the elected official is featured at the event or is a part of the event host committee.
3. Research Democratic donors in your organization's surrounding area – there are websites where information about Democratic contributors is readily available.

The one site that seems most effective is **fundrace.huffingtonpost.com**. The Huffington Post runs this site, and it will tell you who gave to the Presidential candidates by state, city and neighborhood. In 1994, I used this site for a client running in my town, and I discovered that my neighbor across the street gave \$1,000 to John Kerry and his next-door neighbor gave \$1,000 to Howard Dean. I had known these neighbors casually for a few years, but I had no idea they were even Democrats, let alone Democratic givers. Taking the time to do strong research can make a huge difference in expanding your organization's reach.

WRITING THE FUNDRAISING PLAN

Now that you have taken the time and asked the difficult questions about your organization's mission and assessed the strengths and assets of the organization, it is time to begin writing a plan to guide how you will raise the funds needed to achieve your objectives. It is important to take all of the input you from your team and begin to sketch out the best way to move forward.

The following are the four fundraising mechanisms to consider when writing a plan:

- 1. Membership Dues**
- 2. Hosting a Fundraising Event**
- 3. In Person Meetings or Telephone Solicitations**
- 4. Email and Direct-Mail Solicitations**

1. Membership Dues

Each Democratic Organization and Club is set up differently. However, in many cases organizations use membership dues as part of continued membership and commitment to their organization. This may be a small amount of money, but if you have one hundred members that are required to pay a \$35 membership fee – that is an additional \$3,500 to your bottom line.

Those organizations that do not charge membership dues, and are not precluded from doing so, may want to consider dues as another mechanism for raising money, expanding your organization's reach, and solidifying the strength of your membership base.

2. Hosting a Fundraising Event

For most organizations, the foundation for fundraising will be built on events and the list developed to support those events. The easiest way for an organization to test this list and bring in initial funds is to host an event. Events can vary in size, but it is recommended that each organization have a large, signature event annually that highlights state and local Democrats and showcases your organization's prominence in the community. In addition, smaller events, such as coffees and co-sponsored events with candidates and/or other organizations can be additionally effective, but should be secondary to the overall effort.

The message, or "hook," needs to be determined when getting started. Are you inviting people to a conversation with a prominent elected official or a chili-cook off? Either can be immensely successful, but your organization must develop the message surrounding the event ahead of time.

Events can be a huge time suck and expense if not planned and implemented properly. It is important to have a strategy and set a realistic goal at the outset. The steps in securing an event and the timeline to execute it should be almost the same no matter the size and the scope of the event.

EVENT TIMELINE: Planning, Implementation and Follow-Up

3 - 4 Months Prior to the Event: Meet and Set Goals

- A. Determine what the event will be (time of day, type of event, event message)
- B. Determine how much you want to raise
- C. How much you want to charge (for example: Sponsorships for \$1,000 and individual tickets \$150 each)
- D. Determine in what city the event should be held and narrow venue options
- E. Consider if there are venues that can be donated or where your organization may be able to get a reduced rate
- F. Consider event dates (for example: if May is your target month, determine what other events are happening and what is the best timing)
- G. Consider a celebrity, political star draw or "Special Guest" for the event and reach out to their people with dates and times
- H. List project – is the list ready for a major email blast and/or invitation mail blast
- I. Sponsor list or host committee must be completed ASAP
- J. Ask elected officials or "prominent friends" if they could place sponsor calls

6 - 8 Weeks Prior to the Event

- A. Date and venue must be solidified
- B. Event draw must be solidified
- C. Catering must be solidified
- D. Invite must begin being designed, proofed and sent to printer
- E. Sponsors should begin being contacted for support by all callers
- F. "Save the Date" email to sponsors should go out
- G. Make sure event tracking is current

3 - 4 Weeks Prior to the Event

- A. All invitations should be sent out
- B. Follow-up calls to sponsors should continue
- C. Follow-up calls to remaining list should begin
- D. Menu should be finalized with caterer

- E. Finalize logistical arrangements, such as “Special Guest” pick-up, timing of appearance and specific remarks
- F. Make sure all deposits are paid to venue, caterer and other vendors

Week of the Event

- A. Continue making calls to invitee list – keep raising money!
- B. Begin designing a “Sponsor Recognition” placard for event entrance
- C. Make sure event tracking is current
- D. Check in with all vendors: caterer, music etc., to ensure all are on track
- E. Finalize speaking program
- F. Make sure you have enough volunteers to assist with event check-in
- G. Make sure event tracking is current

Day of the Event

- A. Finalize event tracking
- B. Print name tags for pre-registered guests
- C. Make a ‘sign-in’ sheet for walk-in guests
- D. Arrive early at the venue
- E. Make sure the caterer and any other vendors have everything they need
- F. Meet volunteers prior to the event to help train them on what they will be doing: accepting contributions, making name tags, or just pitching in
- G. Designate someone to be in charge of the “Special Guests” – have they arrived? Do they need a holding room? Do they need refreshments?
- H. Designate someone to keep track of all elected officials who arrive
- I. Continue to troubleshoot and monitor the event flow

Post Event

- A. Reconcile list and follow-up with those who pledged but did not contribute
- B. Update the database with the new information
- C. Thank donors

3. In-Person Meetings or Phone Solicitations

As your organization is building support and growing in numbers, it is important that you consider recruiting new members and major sponsors by providing them with a personal touch. There are two ways to achieve this, either a personal meeting or telephone call. If the Board or a surrogate representative of your organization identifies a potential supporter who would make a huge impact on the organization’s bottom line, you must consider meeting with them face to face. While in-person meetings are most effective, they should be reserved for those special donors that require more convincing or could potentially contribute significant money or time to your organization.

For those sponsors who have participated in the past, or may be helpful but not to the same extent, a personal phone call from a Board member or appropriate surrogate can be very effective. The key to both approaches is that when asking for significant dollars, a personal touch is required. It is a proven fact of fundraising that the more personal the “ask,” the higher the donor commitment.

Lastly, it is important to keep careful track of your commitments and donor outreach. This is imperative to complete any follow up in addition to maintaining organization when you may have 5-10 people making phone calls or conducting meetings to raise money for the same event.

4. Email and Direct Mail Solicitations

Email and direct mail solicitations are very helpful in list development and invitation dissemination. While they are less effective than in-person or telephone solicitations, direct mail/email solicitations give your organization the ability to reach out to a much broader audience and test more possible prospects to expand your organization's fundraising base.

The least costly, and most effective of the mailing options is email. If your organization has an existing web site, email solicitations can provide an easy way for people to link back to your organization and almost immediately make a contribution. Old-fashioned direct mail still works, especially when mailing invitations for events. However, given the rising cost of postage, direct mail should be well targeted and used with a carefully vetted list. For example, direct mail to an elected official's list that he/she has given you will be far more effective than a list you purchase from a list vendor.

DONOR ACKNOWLEDGMENT

The most important part of fundraising mechanics is a proper THANK YOU. Donors must be acknowledged for their support and friendship, and the strength of a personal thank you will likely ensure that donor will give in the future. When considering thanking donors, you must apply a few basic rules:

Personalization – The more personal and direct the thank you, the better. If you have some stand out supporters, a personal call or a handwritten note will always be superior to a form letter. That being said, a form letter needs to go out at a minimum.

Speed – The quicker you thank the donors, the better. You can sacrifice a little speed for a personal touch. But, donors must be thanked within 2 weeks of their contribution.

Update – With a thank you note should come some information about what your organization did with the funds or are planning to do. How you are achieving your goals and how did their money help you get there?

Never ask for more money in a thank you note – it's tacky and will not be well received.

Never ask for more money before you have thanked the donor –that's rude and timing is extremely important.

Never use a thank you note to give bad news about your efforts or campaign.

RE-SOLICITATING DONORS

Going back to your base of donors is necessary for long-term financial stability, but can be tricky. It is important to give them some distance from their previous contribution and a reason for them to participate again. If you have a specific program for them to support and some momentum behind that program, it is much harder for an already invested donor to say NO and not participate again.

For instance, the fictitious group used in the sample materials in this book, the Next Generation Democratic Club, might have gotten word that a candidate they had not yet supported in the Central Valley is exciting and has a real chance of pulling an upset.

The group may decide they want to raise some quick dollars in order to support that candidate. Making a re-solicitation call to a supporter who has proven they believe in the organization's mission is the most effective way for NGD to achieve that goal. But, if they call this donor three weeks following their large annual event that the donor just sponsored, they may be bothered with the timing of the quick additional ask. The key here is the fine line between needing more help and showing appreciation for past help. Keep this in mind when re-soliciting donors.

In addition, a re-solicitation form letter may be effective with your lower dollar supporters, but with sponsor types, it is important to stick with the personal touch. Board members need to reach out to the higher dollar contributors individually and lay out the strategy with them. This will help insure they will help and also make them feel valued in the relationship.

EFFECTIVELY USING YOUR ENDORSEMENT POWER

Endorsements are a fundamental part of every Democratic organization. Your mission is to help elect Democrats no matter how specific or broad your group chooses to define that. With the responsibility to select candidates to support comes great power, and most clubs do not use this power to their organization's benefit. There are three questions you must ask yourself in order to effectively use the power of your endorsement: First, who did your organization endorse? How can the momentum of the race help you raise money? And how can the candidate themselves help you raise money?

Let's go back to our fictitious club, NGD, and say they endorsed an Assemblyman from the Fresno area. Now let's say that Assemblyman has a tough race because redistricting has changed the make up of his Central Valley seat. NGD can use this race to generate excitement and ask their supporters to help "Elect the next generation of Democrats." In addition, the candidate you have supported will have a select number of maxed-out donors (donors who cannot contribute any more direct support to the Assemblyman under the law). NGD can approach those maxed-out donors and ask them to assist their group in "lecting the next generation of Democrats."

Thus, you are generating momentum for your organization and your endorsed candidate, and keeping your membership excited about the overall mission of the organization. However, make sure that your efforts are not stepping on the endorsed candidate's efforts. There is a finite universe of money, and you don't want to solicit donors that the candidate is still trying to pursue for contributions. Therefore, be very cautious if focusing on maxed-out donors.

CONCLUSION

Fundraising seems at first glance to be a daunting undertaking, but in fact, once your organization goes through the exercise of answering a simple set of questions, the plan becomes evident. Much of your organization's efforts will be unique to your group and its mission. What may seem overwhelming at first can be broken down bit by bit to come up with an overall arrangement that will allow your group to succeed. This success is a tangible and significant help to the overall success of the Democratic Party this year and beyond. When you got involved, you got involved to make a difference. Fundraising is a very concrete way to make that difference that delivers an outcome, demonstrates immense support and ultimately elects Democrats. You can feel good that your efforts can and will truly pay off.



SAMPLE MATERIALS: A FICTICIOUS DEMOCRATIC ORGANIZATION

“Next Generation Democratic Club” (NGD)

THE MISSION OF “NEXT GENERATION DEMOCRATIC CLUB”

The Next Generation Democratic Club (NGD) was formed by a group of people who were too old for the Young Democrats, but felt that they still needed to have their eye on the up and coming Democrats in the state. The club meets at the beginning of each election cycle to reiterate their mission and outline the club’s goals for the next election.

This year, NGD will decide what the plan of action would be for the 2014 election. NGD decided that the goal of the organization was to help the Speaker of the Assembly. In order to best the Speaker, the club has decided to raise money for up and coming candidates or incumbents that may have tough races due to redistricting and open primary. They would like to make maximum direct contributions through the club’s Political Action Committee (PAC).

STRUCTURE OF NGD

NGD has over 100 active members and an elected board of 12 people. The Board President of NGD is a volunteer and has a full time job. The board will have to support the President, who has been appointed to implement the fundraising objectives.

EXPECTATIONS OF NGD

The mission has been defined, and the group has decided that they want to raise \$50,000 in 2013 and \$50,000 in 2014 in order to support their mission of helping the Speaker and the Next Generation of Legislative leaders. The plan is to have one large signature event each year, with a goal of \$50,000.

NGD’S OVERALL FINANCIAL NEEDS AND GOALS

This is a low overhead club that runs mostly out of people’s homes and on free conference calls. All of the overhead will be related to the actual fundraising effort. The goal of \$50,000 per year seems attainable; however it may be that the 2013 event is lower than the 2014. But in the end, the goal is to raise \$100,000 over the 20-month period.

NGD’S FUNDRAISING TIMELINE

For NGD, the timeline is simple: \$50,000 one month prior to the primary and \$50,000 by one month prior to the General. This way they can contribute to their identified slate of candidates prior to the election.

NGD’S LEGAL QUESTIONS

NGD will need to hire a Professional Treasurer and set up a Committee to accept checks prior to the beginning of their fundraising endeavor.

NGD’S FINANCE DIRECTOR

NGD will have the Board President act as the Finance Director. The President will oversee the effort. The President and Board may come to the conclusion that they have to hire a fundraising professional; but, at this juncture, the President will direct the efforts.

NGD’S FUNDRAISING COMMITTEE

The Board has agreed to play a significant auxiliary role to the President. The Board Members by definition in the Next Generation Democratic Club by-laws serve as Finance Committee members and will help raise money and increase membership.

STAFF AND VOLUNTEERS

While NGD has no paid staff at this time, the volunteer base from their members is significant. The Board assists in identifying members who can help with specific tasks or in-kind donations (a donation that is a gift with a fair market value, such as a case of wine or the catering for an event, as opposed to a monetary contribution) that will support the overall mission.

BUILDING AND MANAGING NGD’S DATABASE

NGD has identified a Board member who will manage and build the list. He will work with the Board and broader membership to expand the club’s membership, affiliate relationships, and the invitee list for upcoming events.

SAMPLE

NGD Fundraising Plan 2013-14

MONTH/DATE	EVENT	LOW GOAL	HIGH GOAL
January/February 2013	Membership Drive	\$ 3,500	\$ 5,000
April/May 2013	Sponsorships for June Event	\$ 10,000	\$ 15,000
June/July 2013	June 1 Signature Event and Collections	\$ 30,000	\$ 35,000
September/October 2013	Membership Barbecue	\$ 2,000	\$ 4,000
January/February 2014	Membership Drive	\$ 3,500	\$ 5,000
March/April 2014.....	Sponsorships for May Event	\$ 12,000	\$ 15,000
May/June 2014	May 5 Signature Event and Collections	\$ 35,000	\$ 45,000
September/October 2014	Membership Barbecue	\$ 4,000	\$ 6,000
TOTAL.....		\$100,000	\$130,000

SAMPLE

Timeline for Fundraiser featuring the Speaker of the Assembly

3–4 Months Prior to the Event: Meeting Held and Goals Set

- A. NGD’s first event will be a cocktail reception on Thursday, June 2, 2013
- B. The goal for the event is \$50,000
- C. The tickets will be \$150 each/\$250 per couple; sponsorships will be \$1,000
- D. The event will be held in Los Angeles at the home of the Board’s V.P.
- E. The Board has reached out to the Speaker to be the honored guest
- F. The Board has met to work on the list and logistics. The Speaker has committed to make 10 key calls and each board member has divided up the sponsor list and taken 10 key calls

SAMPLE

Fundraiser Timeline*(continued)***8–6 Weeks Prior to the Event**

- A. The venue and date are set
- B. The date is secure on the Speaker's calendar
- C. The caterer is a sponsor and will in-kind much of the food
- D. The invitation draft is mocked up
- E. Call have begun contacting sponsors for support
- F. 'Save the Date' email to sponsors has gone out
- G. Begin NGD event commitment tracking

3-4 Weeks Prior to the Event

- A. Invitations are printed, address and mailed
- B. Follow-up calls to sponsors are made (Board meets at board member's law office one afternoon and make calls together)
- C. The Speaker completes his 10 sponsor calls and raises \$12,000
- D. Follow-up calls to invitees begin; ten members split the call list
- E. Menu finalized with caterer
- F. Finalize logistical arrangements with Speaker's Office
- G. All deposits to vendors are paid
- H. Make sure event tracking is current

Week of the Event

- A. Board makes calls to invitee list – keep raising money!
- B. A Sponsor Recognition placard for event is made (thanking the caterer for in-kind donation of food and local union printer for underwriting some of the printing costs)
- C. Update the NGD event tracking
- D. Check-in with all vendors: caterer, music etc., to make sure all are on track
- E. Finalize speaking program: Board VP welcomes everyone to his home then introduces Board President; President acknowledged the elected officials and candidates then introduces the Speaker
- F. Six volunteers assigned to assist with event check-in

Day of the Event

- A. Event tracking is complete: \$46,300 in commitments; \$38,000 collected
- B. Name tags for pre-registered guests are printed
- C. Sign-in sheet for walk-ins completed
- D. All key Board Members arrive at VP's house early
- E. Caterer is cooking and ready
- F. Volunteers are trained and know their tasks: accepting contributions, making name tags, or pitching in on what else is needed
- G. The Speaker has arrived and is mingling with Board Members
- H. A volunteer is at check-in assembling a list of elected officials for acknowledgment by the Board President
- I. THE EVENT GOES OFF WITHOUT A GLITCH – Exceeds Goal!

Post Event

- A. The lists are merged back into the master event tracking, and the Board makes follow-up calls to the pledges who have not yet paid
- B. Update the database with the new information
- C. Thank donors: The Board splits the sponsor list and make calls to personally thank the event's 27 sponsors

SAMPLE Commitment Tracking Worksheet

First Name	Last Name	Phone	Ask Amount	Committed	Received	Rec'd Date	Notes
Kristin	Bertolina	916-552-6887	\$1,000	\$500	\$500	5/30/11	
Michael	Faust	916-555-5600	\$200	\$500			Bringing check to event
Lynn	Guini	213-555-5626	\$2,000	\$2,000	\$2,000	5/15/11	
Terry	Nystrom	310-555-4583					See John G. for pledge

SAMPLE Fundraising Call Script

Calls Answered in Person:

"Hi, my name is [_____] and I am calling from the Next Generation Democratic Club.

"We sent you an invitation for our upcoming event with the Speaker of the California State Assembly, and I wanted to see if you will be joining us?"

"The event is Wednesday, June 1 from 5:30 – 7:00 pm at the home of John Smith in Hancock Park in Los Angeles.

"Sponsorships are \$1,000 and tickets are \$150. Will you be able to participate?"

If YES: Take down their name, the name of any guest(s), and find out how much they will be able contribute.

If NO or HAS QUESTIONS: Give them an overview of the Mission and how Next Generation Democrats is working to elect new, and up and coming Assemblymembers, while simultaneously bolstering the Speaker's majority.

Call Picked-up by Answering Machine:

"Hi, my name is [_____] and I am calling with the Next Generation Democratic Club.

"I wanted to see if you will be joining us and the Speaker of the California State Assembly at our event Wednesday, June 1st from 5:30 – 7:00 pm?"

"Please give me a call to RSVP or for further information at (213) 555-1212."

Note: If someone has not received an invitation or is uncertain, please offer to fax or email them a copy of the invitation.

SAMPLE
Fundraiser Invitation



Next Generation Democratic Club

INVITES YOU TO A SPECIAL EVENING WITH

The Speaker of the Assembly

Wednesday, June 1, 2013

5:30 – 7:00 pm

Home of John Smith

Hancock Park • Los Angeles

\$1,000 Sponsor

\$150 Ticket

RSVP

Call: (213) 555-1212 • Email: rsvp@nextgendem.org

Fax form to: (213) 555-1213

-
- I will attend and be a Sponsor at \$1,000.
- I will attend and purchase ____ ticket(s) at \$150 each.
- Sorry, I cannot attend, but please accept my contribution of \$_____.

Name: _____ Employer: _____

Address: _____ Occupation: _____

City/State/Zip: _____ FPPC I.D. Number: _____

Phone: _____ Email: _____

Check if contributor is registered with FPPC as a Small Contributor Committee

PAYING BY CHECK: Make payable and mail to "Next Generation Democratic Club"
1112 Los Angeles Blvd., Los Angeles, CA 90224 • (ID #555555)

PAYING BY CREDIT CARD:

Print Name on Card: _____

Credit Card Type: _____ Credit Card Number: _____

Expiration Date: _____ Authorizing Signature: _____

● Contributions to the Next Generation Democratic Club are not deductible for federal income tax purposes. Contributions are limited to *[insert current contribution limit]* per year for use in supporting state candidates. There are no limits on contributions used for purposes other than supporting state candidates. Corporations, businesses, PACs and individuals may contribute.



Required Disclaimer Language:

Contributions to the Next Generation Democratic Club are not deductible for federal income tax purposes.

Contributions are limited to *[insert current contribution limit]* per year for use in supporting state candidates. There are no limits on contributions used for purposes other than supporting state candidates. Corporations, businesses, PACs and individuals may contribute.

SAMPLE
**Contribution
 Form**

	A	B	C	D	E	F	G	H	I
16		<i>If self-employed, Business name</i>							
17	CONTACT ADDRESS:								
18	(if different from check)								
19									
20	PHONE/FAX:								
21	Event Code:								
22									
23	Event Name:								
24									
25	Contribution Amount:								
26									
27									
28	Credit Card Number:								
29									
30	Name as it appears on Credit Card:								
31									
32	Card Type:					Expiration:			
33		<i>(VISA, Mastercard, American Express on</i>							
34									
35	Credit Card is:		<i>Personal</i>		Occupation:				
36									
37	<i>(please check one)</i>	<i>If self-employed, Business name</i>			Employer:				
38									
39			<i>Personal, but will be reimbursed by business / organization</i>						
40									
41			<i>Business / Organization</i>						
42						<i>(Name business/organization)</i>			
43	Payee's Address:								
44									
45									
46									
47									
48									
49		ATTACH CHECK HERE							
50									
51									
52									
53									

SAMPLE
**In-Kind
 Contribution
 Form**

	A	B
1		
2		In-Kind Contribution
3		
4		Next Generation Democratic Club
5		1234 Front Street
6		San Luis Obispo CA 93401
7		
8		
9		NGD FPPC/Committee ID Number
10	From:	
11	Name / Committee	<i>Talley Vineyards</i>
12	Committee ID -	
13	Address	<i>3031 Lopez Drive</i>
14		<i>Arroyo Grande, CA 93420</i>
15		<i>805-489-0446</i>
16		Home Phone / Business Phone / Fax
17	Occupation	
18	Employer	
19	<small>*If self-employed, include business name. If a committee, include Treasurer name.</small>	
20	Employer City / State	
21	Employer Phone	
22	<small>*If a committee, Treasurer phone</small>	
23	Articles / Services Contributed - (Description, quantity, duration)	
24	<i>1 case of wine for annual fundraising dinner</i>	
25		
26		
27	Fair Market Value	<i>\$500.00</i>
28	Basis of value --(Itemized price(s), invoice or rate sheet -- attach copy.	
29	<i>attached letter</i>	
30		
31		
32	Date of Contribution	<i>3/30/13</i>
33	<i>Contributions to the Next Generation Democratic Club are not tax deductible for federal income tax purposes.</i>	
34		
35	<small>Contributions are limited to \$7800 per year for use in supporting state candidates. There are no limits on contributions used for purposes other than supporting state candidates. Corporations, businesses, PACs and individuals may contribute.</small>	
36		

SAMPLE
Thank You Note



April 3, 2013

Tony Martin
Martin Land and Lake Co.
4325 Broadway
Fairville, CA 91668

Dear Tony:

Thank you for your generous contribution and support of The Next Generation Democratic Club! The event was a great success because of you and so many others who continue to donate to our efforts.

Because of your generosity we have identified five up-and-coming Assembly candidates that we will support with maximum contributions before the election.

Together we have accomplished a great deal, but there is much more to be done. Your continued support ensures that we will make a difference in helping elect the Next Generation of Democrats!

With warm regards and great appreciation,

Pat Richmond

Pat Richmond
President, Next Generation Democratic Club



SAMPLE
**Re-Solicitation
Letter**



September 3, 2014

Tony Martin
Martin Land and Lake Co.
4325 Broadway
Fairville, CA 91668

Dear Tony:

We are writing to update you on our exciting news and ask for your help. The Next Generation Democratic Club has had a banner year with several successful WINNERS in the Primary Elections. Now more than ever, we must keep the momentum going!

The General Election is only two months away and we want to support more candidates than ever before. There are several key races in the Central Valley and Inland Empire that need our help. This is the time when your contribution can make the difference between VICTORY and defeat.

Please consider supporting us by matching your past contribution of [\$_____]. Your help is appreciated and will make a direct impact on our success.

Together we have accomplished a great deal, but there is much more to be done to elect the Next Generation of Democrats.

Thank you in advance for your continued support.

Pat Richmond

Pat Richmond
President, Next Generation Democratic Club



“Learn to Fish”

Fundraising Guidebook for Democratic Organizations

Authored by Kristin Bertolina Faust
President, Bertolina & Barnato Consulting, Inc.

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**CALIFORNIA
DEMOCRATIC
PARTY**

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