



**Campaign Boot Camp:  
Fundraising and Finance**  
*November 6, 2019*

# CAMPAIGN FINANCE COMPLIANCE

# DISCLAIMER

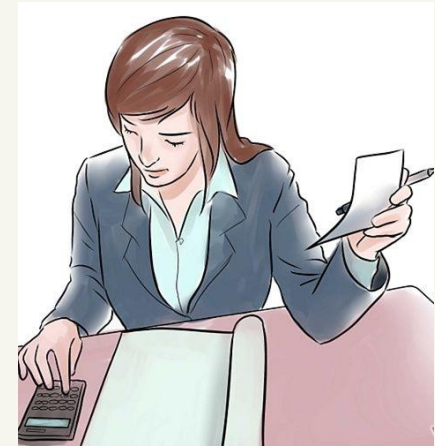
- Presentation is for educational purposes only and designed for candidates who plan to raise or spend \$2,000 or more on their election under FPPC Compliance Regulations.
- Each candidate is responsible for ensuring they are meeting all legal requirements.

# CAMPAIGN TREASURER

- An essential member of your campaign team
- A professional treasurer will assure your campaign finances are in order
- Legally, a candidate, family and/or friend can serve as a treasurer. This is highly not recommended because there are different finance rules and reporting regulations that must be followed. It is not as simple as taking in money and making expenditures.
- Get a professional treasurer if at all possible.

# CAMPAIGN TREASURER DUTIES

- Processes and deposits contributions received
- Issues campaign expenditures
- Reconciles monthly bank statements to confirm numbers being reported match what is in campaign bank account
- Ensures contributions and expenditures comply with jurisdiction compliance law



# CANDIDATE/ TREASURER SEMINAR

*Presented by the Fair Political Practices Commission*

This workshop will cover:

- Getting started activities
- Campaign reporting and advertising
- Post-Election Activities

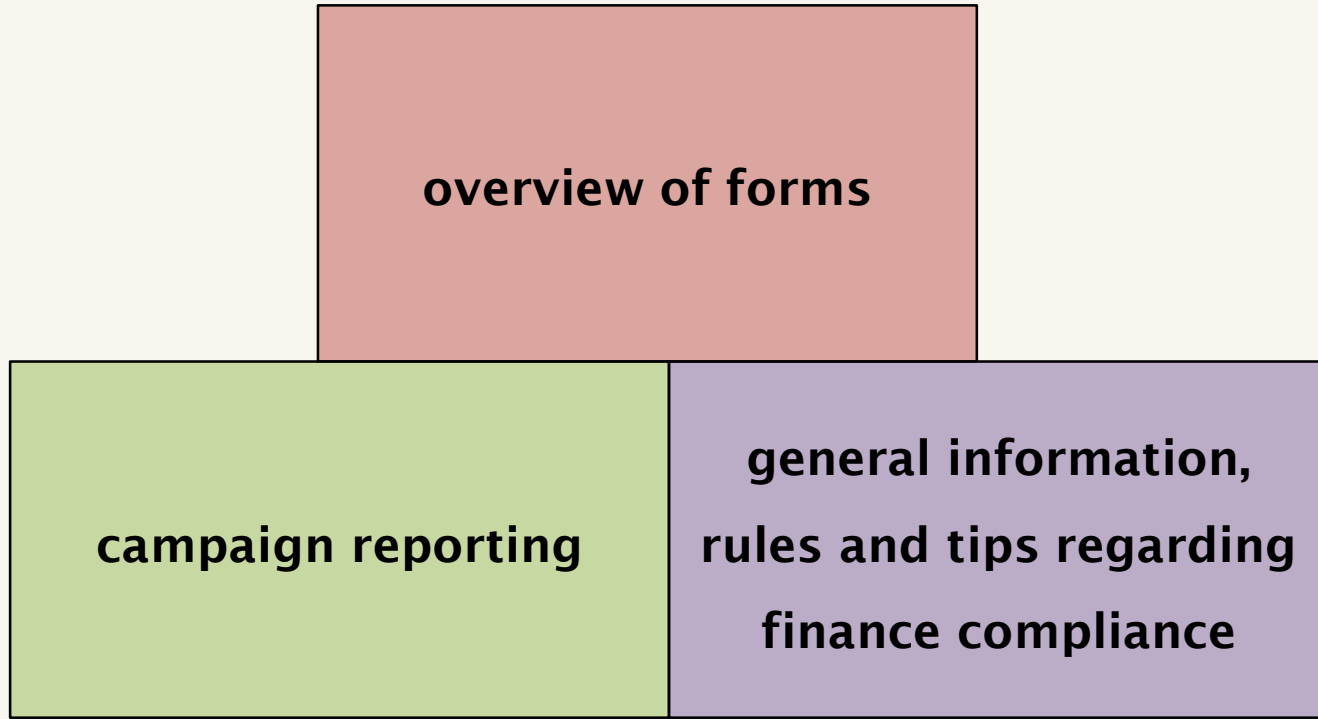
Thursday, December 5, 6:30-8:30pm

Common Chambers

5520 Overland Ave., San Diego, CA 92123

Reservations are required with the County of San Diego/ Registrar of Voters to ensure seating space and materials are available for all participants. Please call our Financial Disclosure section at (858) 505- 7565.

# WHAT WILL YOU LEARN TODAY?



# CAMPAIGN BANK ACCOUNT RULES



No commingling funds (personal and campaign)



All campaign contributions must be deposited into campaign bank account



All campaign expenditures must be made from campaign bank account



Do not use campaign funds for personal use



Candidates may not make out of pocket expenses, funds must first be deposited into campaign account before making an expenditure

# RECORD MANAGEMENT

# RECORD MANAGEMENT

## CONTRIBUTIONS



- Collect name, physical street address, occupation and employer of donors
- Keep copies of the following:
  - Check contributions
  - Cash contributions
  - Credit card contributions
  - Bank statements
  - In-kind contributions

## EXPENDITURES



- Order pre-numbered checks to make payments to vendors
- Keep copies of all receipts and invoices
- Keep record of why a campaign expenditure was made
  - Political, Legislative, or Governmental
  - Purpose of meetings and/or meals
    - Who attended the meeting and/or meals

## OTHER



- IRS documents
- Bank documents
- Contracts
- Campaign literature
- Etc....

# REPORTING

# FORM 460 – CAMPAIGN STATEMENT



Public document



Reports all the money coming in and all the money going out of a campaign



Different reporting deadlines based on a non-election year and election year



File reports with jurisdiction where you are running for office



Subject to fines for filing late or not reporting correct information

# FORM 460 – SCHEDULES

## MONEY COMING IN



- SCHEDULE A
  - Contributions
- SCHEDULE B
  - Loans Received
- SCHEDULE C
  - In-Kind Contributions
- SCHEDULE I
  - Miscellaneous Increase to Cash

## MONEY GOING OUT



- SCHEDULE B
  - Loan Repayments
- SCHEDULE E (SCHEDULE D & G)
  - Expenditures
    - D = Expenditures made to other committees
    - G = Sub-vendor information
- SCHEDULE F
  - Accrued Expenses

# SCHEDULE A – CONTRIBUTIONS

## YAY

- Date received
  - When the committee has possession of the money
- Disclose details of donors
  - Name, physical street address, occupation, employer
- Disclose true donor
  - Donor is person who signed the check or authorized on credit card
  - Money laundering occurs when true source of contribution is not disclosed

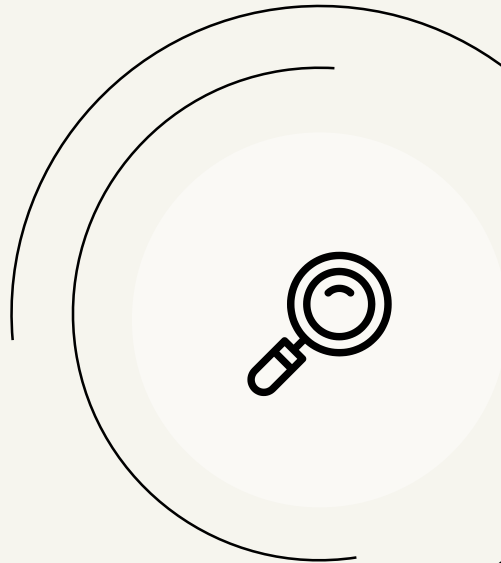
## NAY

- CANNOT ACCEPT
  - Cash contributions of \$100
  - Cashier Checks or Money Orders of \$100 or more
  - Money from foreign nationals

## TIPS

- Due diligence to collect donor information when receive contribution
- Have envelopes to keep track of donations received with date
- Credit card contributions
  - Confirm all credit card information including billing address to process
  - Find out if there are limitations to contributions received- including limits and who you can accept money from

# SCHEDULE B – LOANS RECEIVED | REPAYMENTS



**Candidate's personal funds may be used as a loan to the campaign**

**Keep record of when loan was received, and where funds are coming from**

**Loans made to campaign can be repaid with contributions received**

**Loans are converted to contributions if candidate chooses not to be repaid or if there are not enough campaign funds to cover loan repayment**

# SCHEDULE C – IN KIND CONTRIBUTIONS

- Date received = gain possession of goods or services
  - Report donated items at fair market value (what would it cost any member of the public to purchase the item)
  - Provide description of good or services received
- Food and beverages
  - Rental spaces
  - Tickets to events
- Have donors fill out an in-kind contribution form with all info and give you receipts
  - In-kind contributions count towards contribution limits
  - If a donor makes an in-kind contribution and a monetary contribution, these are aggregated together to count towards the contribution limit

# SCHEDULE E – EXPENDITURES



## YAY

- All expenditures must have a political, legislative or governmental purpose
- When paying vendors confirm the physical street address and invoice with description of service
- May designate a personal card as a campaign card
  - Credit card must have a \$0.00 balance



## NAY

- Campaign funds may not be used for personal purposes
- Do not withdrawal cash from the campaign bank account to make payments to vendors
- Candidate may not reimburse themselves for expenditures made with personal funds



## TIPS

- Due diligence to collect all vendor information
  - If paying an independent contractor or firm more than \$600 in a year, will need to send them a 1099
- Keep good record of expenses being made
  - Take photos of receipts

# SCHEDULE D & G

## SCHEDULE D



- Expenditures made to support or oppose other candidates, measures or committees
- Examples include
  - Monetary contributions
  - Payments made to a vendor for goods or services
  - Payments made for communications
- Disclose the dates and amounts of contribution or expenditure

## SCHEDULE G



- Payments made by an Agent or Independent Contractor (on behalf of the committee)
- Credit card expenditures
  - Expenditures made of \$100 or more
- Payment made to other vendors
  - Expenditures made of \$500 or more

# SCHEDULE F – ACCRUED EXPENSES



## YAY

- Outstanding debt
- Report goods or services received, but have not yet been paid during a reporting period
- Continue to report as accrued expenses until they have been paid off



## NAY

- Do not have vendors manipulate their invoices to reflect a different date than when services were received



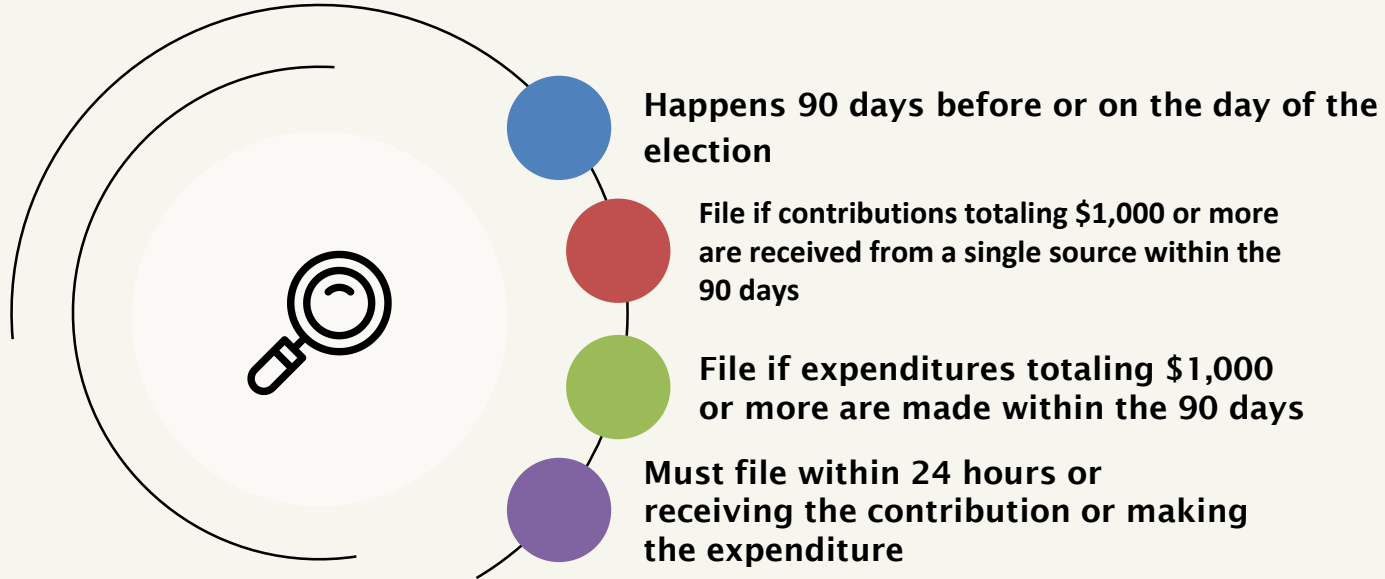
## TIPS

- Close to a reporting deadline, start asking vendors you will need invoices for reporting purposes
- Receive an invoice after reports have been filed, no worries you can amend the report to disclose the information

# SCHEDULE I – MISC INCREASE TO CASH

- Interest from banking account
- Filing fee refunds from vendors, city/county clerk
- Sale of items (up to fair market value)

# FORM 497 – 24 HOUR REPORTING



# MAJOR DONOR

- Happens when the committee receives \$5,000 or more from a donor
- Committee must send donor a notice that they may need to file as a major donor
- Keep a copy of the letter sent to the donor

# REPORTING DEADLINES - 2020

Reporting Statement	Fundraising Period	Report's Due	Notes
<b>Non-Election Year</b>			
1st Semi-Annual Report	01/01/2019 - 06/30/2019	7/31/2019	
2nd Semi-Annual Report	07/01/2019 - 12/31/2019	1/31/2020	
<b>Election Year - 2020</b>			
<b>Primary</b>			
1st Pre-Election Report	01/01/2020 - 01/18/2020	1/23/2020	
2nd Pre-Election Report	01/19/2020 - 02/15/2020	2/20/2020	
3rd Pre-Election Report	02/16/2020 - 02/26/2020	2/28/2020	<b>City of San Diego ONLY</b>
1st Semi-Annual Report	02/16/2020 - 06/30/2020	7/31/2020	
Form 497 - 24 Hour Reporting	12/04/2019 - 03/03/2020		contributions made or received to or from a committee that has an FPPC ID No. that total \$1,000 in aggregate amounts
<b>General</b>			
1st Pre-Election Report	07/01/2020 - 09/19/2020	9/24/2020	
2nd Pre-Election Report	09/20/2020 - 10/17/2020	10/22/2020	
3rd Pre-Election Report	10/18/2020 - 10/28/2020	10/30/2020	<b>City of San Diego ONLY</b>
2nd Semi-Annual Report	10/18/2020 - 12/31/2020	1/31/2021	
Form 497 - 24 Hour Reporting	08/05/2020 - 11/03/2020		contributions made or received to or from a committee that has an FPPC ID No. that total \$1,000 in aggregate amounts

# AFTER THE ELECTION

# AFTER THE ELECTION

- Must continue to file campaign reports and pay the \$50 annual fee until the committee is terminated.
- May continue to receive contributions to pay outstanding debt.
- May use leftover funds for different purposes (dependent on winning or being defeated).
- Leftover assets belong to the campaign, not the candidate. These assets can be sold for FMV. Funds received are reported on Sch I.
- To terminate campaign committee, there must be no remaining funds or plan to receive contributions or make expenditures.
- File Form 410, stating committee is being terminated. File Form 460, last report showing the account with \$0 balance.

# QUESTIONS



# NON-FED. FINANCE REQUIREMENTS

- Solicitations must include the legible name and address of the committee (as registered with the SOS) – mass mail, flyers, email, etc. (additional rules in City of San Diego)
- Solicitations must request the donor's name, physical address, occupation, employer, and any contribution limits
- Individual contributions aggregating to \$100 or more in a year must include occupation/employer or else be returned in 60 days
- A committee may not accept cash contributions, make cash payments, or keep cash assets (petty cash) of \$100 or more

# MORE FINANCE REQUIREMENTS

- All transactions must have paper backup, and copies of all payments, receipts, and documents related to contributions must be kept for 4 years
- Individual donors must be 18 years old and U.S. citizens or legal residents.
- Non-monetary donations must be reported as in-kind contributions.
- It is illegal for an individual or organization to pay or reimburse a person to make a contribution
- Your jurisdiction may have additional requirements or contribution limits



# FINANCIAL BEST PRACTICES

- Always deposit cash in the bank before spending it
- Review bank statements for unauthorized transactions, and reconcile statements with internal accounting records each month
- Record receipts as mail is opened, and deposit all contributions (or return, if necessary) within 30 days of receipt (10 days for federal committees)
- Get invoices and/or receipts for all payments

# FUNDRAISING



# FUNDING FUELS THE CAMPAIGN

- To succeed, your campaign needs a solid plan for fundraising and financial management
- As the candidate, you're the most important asset in the campaign and the primary fundraiser ... though it may be your least favorite thing to do
- Fundraising requires confidence, skill, discipline, and hard work
- Asking for a contribution gives supporters a way to invest in you and your campaign

# 5 QUESTIONS OF FINANCE

- How much do we need?
- Where will we get it?
- How much can they give?
- How will we ask?
- How will we accept?

# GOALS AND TIMELINES

- Research fundraising totals in past elections for your office to gauge what you may need to fund a viable campaign
- Prepare a budget – ideally accounting for low, moderate, and high fundraising scenarios
- Create a written fundraising plan along a timeline with specific metrics, keeping in mind campaign filing deadlines

# FINANCE PLAN

- Historical donor information that may be applicable
- Endorsers and supporters with large networks
- Event ideas
- Digital: email, Facebook
- Mail
- Call time expectations
- Monthly goals that can be broken down weekly if necessary

# GROUND RULES FOR BUDGETING

- Start from Election Day and work backward
- Voter communication comes first
- Break it down monthly
- Cut revenue estimates by 15% and increase expenditures by 15%
- Voter contact comes first. 65% of budget or more.
- Add on 10% of your total for contingencies

# PREPARE MULTIPLE BUDGETS

- **Gold-** List everything you could possibly need or want to win and add it up. This is your dream number.
- **Silver-** Start cutting from gold. Take out unnecessary overhead (Can you double up on staffer duties?), ineffective communication tools (yard signs), and decrease voter communications budget.
- **Bronze-** Cut from silver. These cuts start to hurt. Decrease staff or rely on heavier volunteer support. Take out anything you can live without and still have a path to victory. This is your minimum budget.
- **Reality-** This is your living, breathing, updated (at least monthly) budget that reflects the realities of the campaign. Some things will be added, others removed.

# SAMPLE BUDGET

What's wrong with this picture?

VOTER CONTACT	July	Aug.	Sept.	Oct.	Nov.	TOTAL
Direct mail				\$1,000	\$1,000	\$2,000
Doorhangers / lit		\$1,000				\$1,000
Lawn signs			\$900			\$900
Voter data		\$300				\$300
Website / email	\$50	50	\$50	\$50	\$50	\$250
Outreach / other	\$150	\$150	\$150	\$100		\$550
						\$5,000
<b>ADMINISTRATIVE</b>						
Manager / assistant		\$500	\$500	\$500		
Fundraising	\$250	\$250	\$250	\$250		\$1,000
Treasurer / filing	\$150	\$150	\$150	\$150	\$150	\$750
Cell phones			\$150	\$150		\$300
Equipment / supplies		\$50	\$100	\$100	\$50	\$300
Volunteer food		\$50	\$150	\$200	\$100	\$500
Other admin	\$100	\$150	\$150	\$150	\$100	\$650
						\$5,000
Sample Budget Total	\$1,000	\$2,350	\$2,550	\$2,650	\$1,450	\$10,000

# CREATE A DONOR FILE

Assemble potential donor contact information, donor history, personal information, affiliations, profession, etc.

- Sources of donors
  - Candidate contacts, holiday card list, Facebook friends, neighbors, family
  - Membership organizations affiliated with candidate who share goals and values
  - What family ties will help fundraising? (Or hurt?)
- Community donors and philanthropists
  - Donor lists on annual reports, event programs of allied organizations, civic donors
- Political contacts, historical donors, and community resources

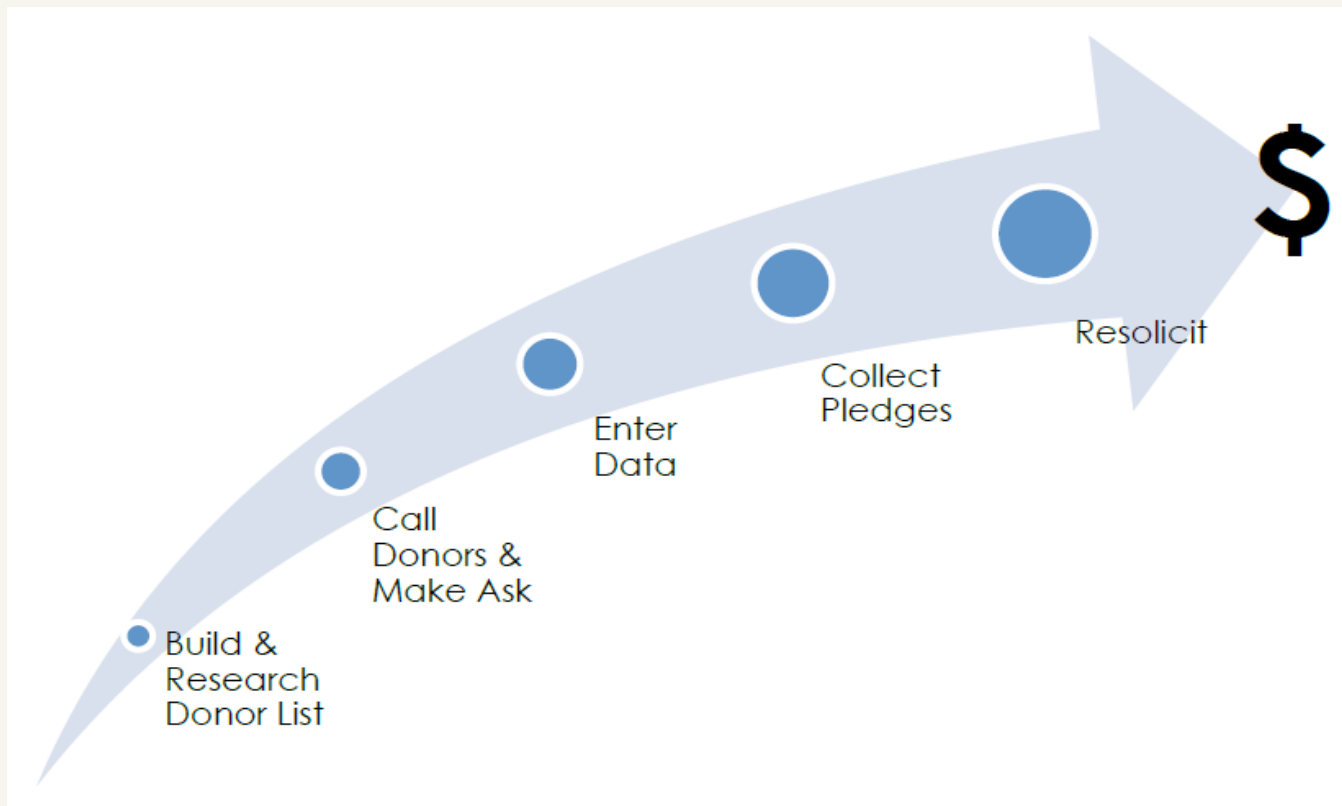
# FUNDRAISING DATABASE

- Start with an excel sheet
  - First and Last Name, Occupation, Employer, Home number, Work number, Cell number, Email, Gender, Affiliation, Amount for ask, Notes about how the candidate knows them and other relevant info
- Add people to your database as you meet them
  - “Hi, my name is Eva. Do you have a card?”

# VENDORS FOR FINANCE

- Compliance: NGP, ISP, Netfile, Aristotle
- Database: NGP, ISP, Netfile, Aristotle, Nationbuilder
- Mass Email: NGP, Nationbuilder, Mailchimp, Constant Contact, Action Network
- Credit Card Processing: Act Blue, Democracy Engine, Square, Paypal

# FUNDRAISING IS A PROCESS



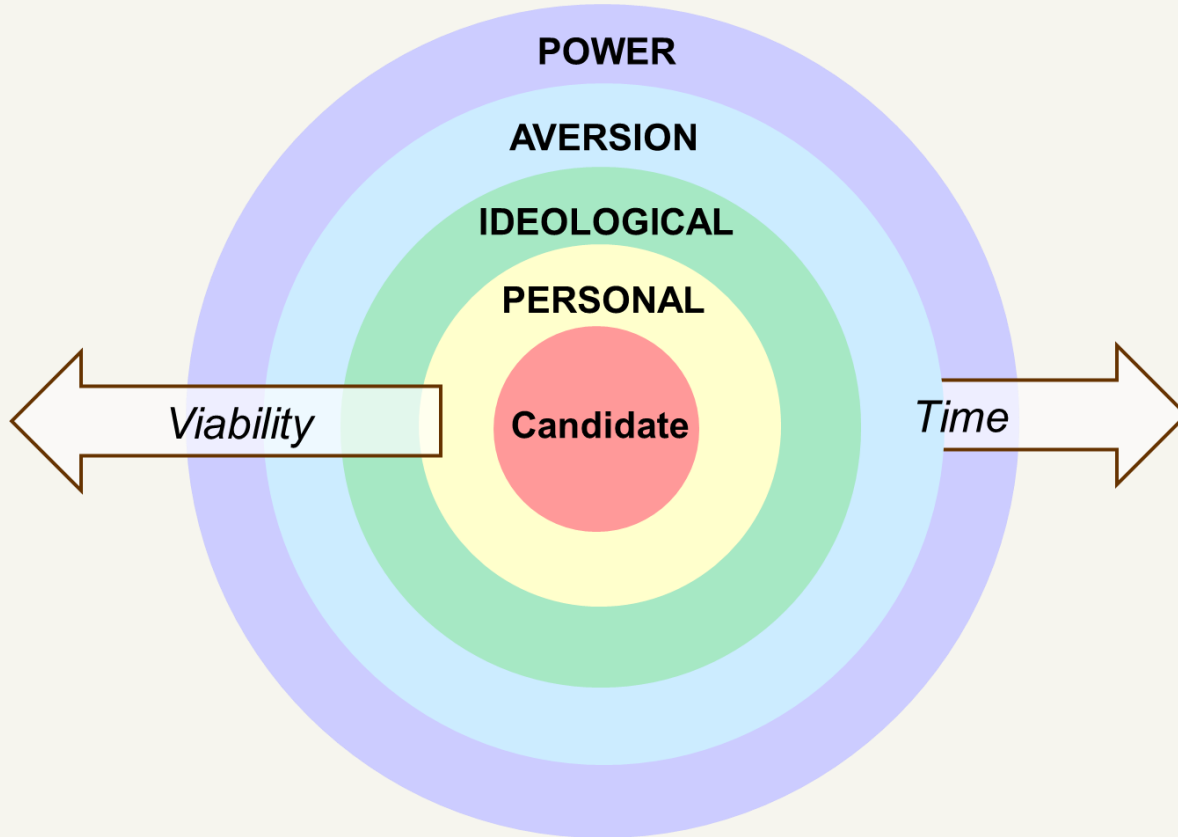
# FUNDRAISING MYTHS

- Political giving is charity.
  - Political donations are not tax deductible.
- Only the rich will donate.
  - They're surprisingly stingy.
- Usual suspects are all you can depend on.
  - Grow your donor base, grow your budget.
- It's rude to ask more than once.
  - If they give once, they'll give again.

# FUNDRAISING IS HARD

- Your candidate will hate it.
- You will hate it.
- Asking for money sucks.
- Money is part of politics. Get over it. You can't change the rules unless you win.

# TYPES OF DONORS



# WHY PEOPLE GIVE

- Personal – family, friends, associates.
  - Early donors. Overlook data and differences because of loyalty.
  - Message: This is the most important thing I've ever done.
- Ideological – members of political party, religion, cultural, ethnic, interest group.
  - Give early regardless of the odds. Accustomed to challenges.
  - Message: We can't give up. We have to fight for what we believe in.
- Aversion to opponent or have a lot to lose.
  - Give early to strengthen campaign and weaken opponent.
  - Message: I'm going to do whatever it takes to beat him/her.
- Institutional power – economic interest.
  - Major donors. Late givers. Favor incumbents and open seats.
  - Message: This is how I'm going to win.

# TACTICS AND TOOLS

- Recruit a volunteer or pay staff to organize fundraising
- Set up an email messaging system and upload your list of contacts and prospects
- Research potential donors
- Prepare call sheets with donor contact info, giving history, background, and suggested amount to give
- Schedule daily call time
- After call time, send follow-up emails and texts
- Plan fundraising events and meet-and-greets
- Fundraise through your website and bulk emails
- Sharpen your skills at “making the ask”

# EFFICIENCY OF METHODS

Method	Response Rate	Avg. Cont. Level	Donor Type	Solicitor	Expense Rate	Collection
Face to Face	50-70%	H	Ind. & PAC	Candidate & Surrogate	1-5%	1-7 days
Telephone	30-50%	M - H	Ind. & PAC	Candidate & Surrogate	1%	1-7 days
Events	15-25%	L - H	Ind. & PAC	Surrogate & Staff	10-15%	1-7 days
Cold prospect mail	1%	L	Ind.	Staff	100%	6 weeks
Resolicitati on mail	5-10%	L-H	Ind.	Staff	10-15%	6 weeks
Online	1-10%	L - M	Ind.	Staff	1%	1-7 days

# CALL TIME: IT SUCKS, BUT IT'S NECESSARY.

- Set a pre-determined schedule for call time in a consistent location free of distraction and schedule the rest of the campaign around that. (Or your candidate will never do it and you won't meet your budget.)
- Stick to at least 10-15 hours per week. Increased around deadlines and budget necessities.

# STAFFING CALL TIME

- Make sure you have an email address dedicated specifically to fundraising and follow up. It can be a gmail. No one cares. But it should not go to the candidate, it should go to the call time staffer.
- Ensure your candidate is not distracted.
- Have a copy of their list in front of you.
- Be ready to look up the people on the list on Google, in your database, or in the voter file so you can give your candidate context for the call.
- Have the call on speakerphone so you can note the details.
- You type up a follow up email immediately after they hang up. Have a template email ready for voicemails as well as conversations. ALWAYS INCLUDE THE DONATE LINK.

# STAFFING CALL TIME (CONT.)

- If someone offers to host an event, try to get a date with them while they are on the phone. They are less likely to flake that way.
- Take credit card information over the phone. ALWAYS HAVE A REMIT READY.
- Have some kind of motivation for your candidate. Reward systems go a long way.
- Tie asks to a specific action: Attend an event, raise by deadline, pay for a mailer, etc.
- Be ready to tell your candidate to cut the crap.

# CALL TIME PROCESS

- Schedule 2 hours a day. About 25 calls an hour; expect to reach 6 people and get a commitment from 3. Set up a quiet place with no distractions. No other incoming calls.
- Call manager sorts calls and prepares call list with donor history, background, including a specific suggested amount based on donor history.
- Script. What are you asking? News? Urgency? Goal?
  - Solicitation of contributions for specific purpose
  - Solicitation of host committee members for a fundraiser
  - Solicitation of surrogates to raise money for your campaign
  - Solicitation of endorsements
- Script must include a specific ask for specific amount.
- Make notes on the call sheets to record details of conversation and build relationships. Obtain emails and personal contact info.
- Most calls will result in leaving a message and following up.

# “THE PITCH”

- Introduction- “Hi, Im\_\_\_ running for...”
- Connect- “I’m calling you because...”
- Benefit- “We really need to fund..”
- Ask- “Will you donate \$100 today?”
- **STOP TALKING**
- React- According to what they said Listen.
- TAKE THE MONEY OVER THE PHONE
- Thanks/Understanding- “I really appreciate/ I understand..”
- Follow up- Email, text, make note to call again

# REACTION

- “Yes” → “Thank you so much! To make it easier on you and so my team doesn’t have to bug you later, I can take your credit card information over the phone right now.”
- “That’s too much.” → Negotiate
- “Need more information.” → Offer to answer any questions. Send information to them. With a link.
- “No.” → Ask why. It may get awkward but it’ll help you strengthen your pitch in the future. Then “Thank you for your time. I understand.”

# SAMPLE CALL TIME MESSAGE

Hello John,

*This is \_\_\_\_\_.*

*I'd like to bring you up to date on my campaign for \_\_\_\_\_. You know that I am running because \_\_\_\_\_. Our polls show that \_\_\_\_\_. (Or, all indications are that this is going to be a very close race.) We're off to a good start. As you know this is really key building the viability and momentum of our campaign. I hope I can count on your support in this. Can you make a contribution of \$200 today to help us reach our goal of raising \$\_\_\_\_\_ by \_\_\_\_\_?*

Stop talking. Let the donor think and answer. They may counter with a lower amount.  
Don't talk them out of it!

# CALL TIME FOLLOW-UP MESSAGE

Following up on calls with an email message or note gives donors an easy way to respond:

*I'm sorry that I missed you today. I wanted to talk with you today about my campaign. OR I have some good news. OR an important development.*

*I am running because.... I hope that you agree ..... and that I can count on your support with a contribution of \_\$\_ to my campaign.*

*Please give me a call at (000) 000-0000 at your convenience. You can also learn more about my campaign and make a contribution at [www.\\_\\_\\_\\_](http://www.____). I have attached a one-pager with information on my candidacy and a contribution form that you may use to contribute by check if you prefer.*

*Thank you for your support!*

# SAMPLE DONOR PROSPECTUS



Sunday Gover is a lifelong San Diegan, public school mom and a successful small business owner. Now, Sunday is running for State Assembly to bring new leadership to Sacramento and make real progress on the priorities that matter to San Diego.

As a mother and 18-year Scripps Ranch resident, Sunday understands the challenges ordinary people face and will bring that fresh perspective to Sacramento to deliver for our communities.

Running a small family business, Sunday knows what it takes to create jobs, meet a payroll and contribute to a growing economy. Sunday attended University of San Diego High School and graduated from UCSD. She lives in Scripps Ranch with her partner Kim, their four children and their dog, Lily.

## In the Assembly, Sunday WILL:

- Oppose GOP cuts to the Children's Health Insurance Program
- Expand STEM education starting in elementary school
- Work toward universal public pre-school
- Freeze in-state tuition at UCs and CSUs
- Expand career education for our kids
- Defend Choice and Women's Health
- Stand up to the NRA for common-sense gun laws

With the national political landscape and uncertainty around the Supreme Court, it is more important than ever to elect leaders who share our values and will stand up for every day Americans. Sunday is that leader for the 77<sup>th</sup> Assembly District. With your help, we can flip the 77<sup>th</sup> and give California values a seat at the table in North County.

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

@sunday\_gover VoteSunday77 votesunday77@gmail.com

Paid for by Sunday Gover for Assembly 2018 FPPC#1397541. Printed In-House.

## SUNDAY GOVER *Our Values. For a Change.*



### 77<sup>th</sup> Assembly District: A seat that can swing

Registered Voters: 279,512

Party Breakdown: R 32.54%, D 32.08%, Ind 30.35%

\*Registration trends show that Democrats will outnumber Republicans by Election Day in November.

Clinton beat Trump by sixteen points in 2016.

Assembly Democrats Political Director, Bill Wong, has weighed in on Sunday's campaign for AD77, saying: **"The changing demographics and the national wave of opposition to the extreme Republican agenda in DC makes your race a top tier pick up opportunity for Speaker Rendon in 2018."**

### Sunday Gover: A candidate who can win

- Sunday's real-life experience as a public school mom, cancer survivor and small business woman resonate strongly with voters in this suburban middle class district.
- In the primary election, Sunday raised more funds for her campaign than the district's last two Democratic challengers raised in their entire campaigns, combined.
- Polling shows the race in AD77 is a toss up, with the incumbent holding just a 2-point lead.
  - 46% of voters believe that it is time for new representation in the district, while only 36% would vote to re-elect the incumbent.
  - Sunday holds the lead among many demographics, including Latinos, AAPI, Democrats and Independents.

### Partial Endorsement List

California Democratic Party  
EMILY's List  
Equality California  
California Teachers Association  
United Domestic Workers  
Planned Parenthood Action Fund  
Brady Campaign to Prevent Gun Violence  
Goosage Campaign  
SEIU California  
United States Senator Dianne Feinstein  
Speaker of the Assembly Anthony Rendon  
State Controller Betty Yee  
San Diego City Attorney Mara Elliott  
Councilmember Barbara Bry  
Councilmember Chris Ward  
Councilmember Cori Schumacher  
Councilmember Steve Padilla  
School Board President Kevin Baizer

## How can you help flip the 77<sup>th</sup>?

It's simple, really. Sunday needs resources to win.



**DONATE** up to \$4,400:  
[www.votesunday.com/donate](http://www.votesunday.com/donate)  
OR **Make checks payable to:**  
Sunday Gover for Assembly 2018  
3401-A Adams Avenue, No. 345  
San Diego • CA • 92116

**HOST** a Fundraiser:  
Email [VoteSunday77@gmail.com](mailto:VoteSunday77@gmail.com)  
Team Sunday will connect with you.

# ACTIVITY: WRITE A CALL TIME SCRIPT

- A friend of yours from college who you haven't spoken to in ten years.
- A Democratic Donor who also has a history of maxing out to candidates. He also is known for charitable giving to Planned Parenthood and Sierra Club.
- A Union Leader who gives consistently, if not hugely, to those she sees as advancing the agenda of working families. She's not personally wealthy, but she's well connected.

Pitch > Reaction > Follow Up

# REMITTS: INCLUDE EVERYTHING

- Contribution amount options
- Donor contact information
- \*\*Occupation and employer
- \*\*Donor Physical Address
- Credit card information
- \*\*Disclaimer with committee #
- \*\*Campaign address and website
- Walk precincts
- Make phone calls
- Volunteer in office
- Host a meet-and-greet
- Yard sign
- Line to sign for endorsement
- You can make envelope/form in-house

Yes, I want to help elec! John Smith-Reed for Court of Common Pleas!

Enclosed is my contribution of:

\$2,000    \$1,000    \$500    \$100    \$50    \$25    Other \$ \_\_\_\_\_

I can also help in other ways:

Host a Fundraiser                       Volunteer  
 Make phone calls                         Go door to door  
 Put up a lawn sign                         Work on election day  
 Other \_\_\_\_\_

For more information call: 215-555-1212

---

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Employer \_\_\_\_\_ Occupation \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_  
Email address \_\_\_\_\_

Method of Payment:    Visa     Mastercard     Personal Check

Name on Card \_\_\_\_\_  
Credit Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Make checks payable to  
John Smith-Reed for Court of Common Pleas



# ONLINE SOLICITATION

- Targets supporters and previous donors
- Rapid reporting of current developments: Share new polling data, deadlines, opponent news.
- Good for low-dollar donors and building donor base
- Invitations to events, rallies, volunteer activities
- Easy to track effectiveness of subject line and message based on open / click-through / contribution data

# FUNDRAISING BY EMAIL

- Cull your lists. (No dot gov's. No city employees if you're running in City of San Diego. No lobbyists if you're running in the County. Info @, Contact @, etc.)
- A/B testing
- Vary lengths and depth of messaging.
- Calls to action.
- Send an intro email when you add new lists to your database.
- Pay attention to your unsubscribe and click rates.

# SAMPLE EMAIL



Dear Friend –

We've done so much together over the years. We've built a movement to make City Hall work for the people of Carlsbad.

That's why I wanted you all to be the first to know:

[I'm running for City Council District 1.](#)

Serving the people of Carlsbad has been the honor of my life. Over the last three years, we've increased public safety, reformed out-of-date policies and procedures, approved projects to provide housing for our homeless veterans, developed a model homeless response plan, and put more protections in place for our environment.

**But there's more to be done.**

I am humbled and honored to ask for your support, once again, to keep our movement going. **The election is in just 111 days.** That means we are in for a sprint, not a marathon. [I need your help NOW!](#)

Please make [a secure, online contribution right now](#) to help us build the foundation we need to get this campaign off the ground.

I know I cannot do this without you, and I am eternally grateful for your steadfast support.

For you. For us. For Carlsbad.

**DONATE**

# FUNDRAISING EVENTS

- Use events to leverage your networks and cultivate supporters.
- Set multiple donor levels to maximize contributions – e.g., Guest \$50, Sponsor \$125, Host \$250.
- A host committee can bump the response rate of an event to as high as 25%. Without a host committee, response rate can be 1%. Hosts commit to give or raise higher amounts.
- Requires time, advanced planning, targeting hosts and compelling message for successful in contributions and attendance. “Houses don’t raise money.”
- Be mindful of costs.

# FUNDRAISING EVENTS

- Ask comes from the candidate. Staff follows up within 72 hours.
- Hold the hosts hand if necessary.
  - When do they want to schedule? Evening? Weekend? Lunch? Dinner?
  - What do their networks look like?
  - Do they want co-hosts? Can they build a host committee themselves or do they need the campaign's help?
  - What ask do they want to make?
  - Public or private event? At their Home? Office? Public Venue?
  - What is the campaign responsible for?
  - Do they need multiple volunteers? Or will you be enough (wo)manpower?

# FUNDRAISING EVENTS (CONT.)

- Get to the event half an hour early. More if the host needs a lot of help.
- Make sure the person staffing the check in table knows the campaign finance rules for your district.
- Name tags: They are for your candidate, not the crowd. Have them unless the host specifically says otherwise.
- Time speaking program to maximize the crowd.
- Make sure your candidate gets food and water.
- Make sure your host gets a hand written thank you from the candidate.

# HOME/OFFICE HOST VS. IN-KIND

- If your event is at the home or office of one of the hosts, that host can spend up to \$500 in non-reportable contributions for food, beverages, decorations, whatever.
- As soon as costs reach \$501, it becomes an in-kind contribution and cash donation rules apply.
- Try to have as many events as possible at private homes or offices. It decreases cost to the campaign and increases the net-gain for each event.

# MEET-AND-GREET HOUSE PARTIES

- Generally no cost to attend; use to meet people grow your base, and raise low-dollar funds
- May have one host or be hosted by several supporters
- Requires 2 weeks from the time you confirm with hosts
- Provide an invitation to distribute in the neighborhood and message for hosts to use to invite other friends and associates
- Encourage hosts to invite all voters in the neighborhood to meet you (the free contact and personal endorsement is important)
- Attendance is generally low
- Provide “host guidelines” with realistic expectations and addresses for voters in the neighborhood from your voter file

# PROGRAM FOR MEET-AND-GREETES

## Preparation

- Staff arrives 30 minutes early to help the host, set up check in table, and put out signs.
- Bring supplies: remits, pens, sign-up sheet, clipboard, literature, check basket, nametags, yard signs, name badges, stickers, etc.
- Bring a camera for candid photos (and sound system if needed)

## Program

- 30-45 min.: check-in, socializing, introductions, mix with guests
- 10 min.: candidate speaks; thank host and guests; bio, priorities, dynamics of race, ask for support
- 15-20 min.: Q&A
- Ask for support and pass around sign-up sheet with volunteer checklist
- Have the host or other surrogate make a compelling ask
- 30 minutes – socializing, follow-up

## Follow-up

- Personal hand-written notes to hosts and “thank you” notes to donors
- Remove event on the website or move to past events

# CAMPAIGN PROVIDES INVITATIONS

Campaign provides invitation as PDF to ensure all necessary information is included:

- Names of Host Committee for FR or hosts for meet-and-greet
- Candidate name, office, campaign contact information
- Logo, image, and/or themed artwork
- Date, time, location
- Suggested giving levels (fundraiser only)
- RSVP online link and/or contribution form for checks.
- Request for contribution if they can't attend.
- Disclaimer and committee ID
- Post event on Website, County Party Calendar, Facebook

# EXAMPLES

## Hosts & Special Guests

Congresswoman Susan Davis  
 Congressman Scott Peters & Lynn Gorguize  
 former Congresswoman Lynn Schenk  
 Senator Marty Block  
 Senator Ben Hueso  
 former Senator Christine Kehoe  
 former Senator Lucy Killea  
 Assembly Speaker Emeritus Toni G. Atkins  
 Assemblymember Shirley Weber  
 Assemblymember Lorena Gonzalez  
 former Assemblymember Nathan Fletcher  
 Mayor Mary Casillas Salas  
 Council Pres. Sherri Lightner  
 Council Pres. Pro Tem Marti Emerald  
 Councilmember Todd Gloria  
 Councilmember-Elect Chris Ward  
 Councilmember Jennifer Mendoza  
 Councilmember Catherine Blakespear  
 former Councilmember Donna Frye  
 SWC Governing Board President Nora Vargas  
 SDCDP Chair Francine Busby  
 Brittany Bailey  
 Laurie Black  
 Taisha Brown  
 Lynn Bruser  
 Bernadette Butkiewicz  
 Gil & Krista Cabrera  
 Molly Chase  
 Nancy Chase  
 Toni Duran  
 Dr. Elaine Hanson  
 Kathleen Harmon  
 Dr. Jennifer Campbell & Suzanne Hawkins  
 Jessica Hayes  
 Mickey Kasparian  
 Judy Ki  
 Carol Kim  
 Sarah Krueger Jager  
 Linda & Carlos Legrette  
 Jennifer LeSar  
 Kate Lyon  
 Robin & Jim Madaffer  
 Jessica Mier  
 Gretchen Newsom  
 Bryan Pease  
 MaryAnne Pintar  
 Jamie & Jared Quient  
 Miyo Refi  
 William Rodriguez-Kennedy  
 Candace Carroll & Len Simon  
 Shawn VanDiver  
 Christina Wu

**With Members Of**  
 Latinas Lead California  
 Run Women Run  
 Democrats for Equality  
 National Women's Political  
 Caucus of California

## Join Us To Make History

By Electing

*San Diego's First Female City Attorney*

# MARA ELLIOTT

## SAN DIEGO CITY ATTORNEY

With Special Guest

## Speaker Emeritus Toni G. Atkins

**Monday, September 19, 2016**

5:30 p.m. to 7:30 p.m.

**Women's Museum of California**

2730 Historic Decatur Road, Suite 103

San Diego, CA 92106

### Suggested Contributions:

- ◆ Student/Veteran: \$35 ◆
- ◆ Leaning In: \$75 ◆
- ◆ Activist: \$200 ◆
- ◆ Suffragette: \$500 ◆
- ◆ Breaking The Glass Ceiling: \$1,050 ◆

Contributions payable to Mara Elliott for City Attorney 2016  
 C/O Jerry Attebery 5429 Madison Ave, Sacramento CA 95841  
 Or online at: <http://www.marae Elliott.com/>

To RSVP or for more information contact Eva or Sydney at:  
[rsvp@kmstrategies.net](mailto:rsvp@kmstrategies.net) or (619) 239-1721

It is unlawful to reimburse an individual's contribution to a City candidate unless the reimbursement is made by another individual and the names of both individuals are provided to the candidate. Political contributions are not tax deductible. City law permits only personal contributions and limits contributions to \$1,050 per individual, per election. Contributions from businesses, labor unions, PACs, and other types of "organizations" are prohibited. We may not deposit your check or credit card payment without your name, address, occupation and employer, and may not accept cash, cashier's checks, or money orders over \$99. We may not accept contributions from foreign nationals.

**Paid for by Mara Elliott for City Attorney 2016 ID#1377818, P.O Box 262018, San Diego CA 92196**

## Please Join SPONSORS

Craig Benedetto • Andrew Berg • Gil Cabrera • Diana & Kevin Casey  
 Nancy Chase • Marcela Escobar-Eck • Christine Frahm  
 Lawrence & Suzanne Hess • Mel Katz • Rachel Laing • James Lawson  
 Jim & Robin Madaffer • Marshall Merrifield • Jared Quient • Hon. Colin Parent

### CO-HOSTS

Rick Gulley • Sumeet Parekh • Ann Smith • Fern Steiner

With Special Guests

Assemblymember Todd Gloria  
 Assemblymember Tasha Boerner-Horvath

For a Kick-Off Reception to Support

# CHRIS WARD FOR ASSEMBLY

## Panama 66

1450 El Prado, Balboa Park

Thursday, March 21, 2019 • 5:30 pm - 7:00 pm

### Suggested Contribution of

\$1000 Sponsor / \$500 Co-Host / \$150 Attend  
 Appreciated.

DONATE ONLINE: at [www.voteforward.com](http://www.voteforward.com)

Or mail to: Chris Ward for Assembly 2020, ID#1415056  
 1050 University Avenue #E107-28, San Diego, CA 92103

Contributions to Chris Ward for Assembly, 2020 are not tax deductible. The California Political Reform Act (Proposition 13) places limits on contributions to candidates for state office and imposes certain prohibitions. This request does not seek a contribution in excess of applicable limits or from prohibited sources. An individual, union, PAC, and other groups may contribute a maximum of \$2,000 to the committee per election, primary and general. A registered Small Contributor Committee may contribute a maximum of \$500 per election. **Paid for by Chris Ward for Assembly 2020, ID#1415056 c/o 330 Encinitas Blvd, Suite 101, Encinitas, CA 92024.**

# THE SECRET IS THAT THERE IS NO SECRET

- Ask a lot of people for
- A lot of money
- In a lot of different ways
- At a lot of different times
- Repeat.

People will not give if they are not asked.

# PRESENTER CONTACT INFO

- Eva Posner- [eva@evincostrategies.com](mailto:eva@evincostrategies.com)
- Stephanie Sanchez- [sdsanchez@pctreasury.com](mailto:sdsanchez@pctreasury.com)