Video Two: Raising the Dough
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GUIDELINES FOR FUNDRAISING

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There are very few people in politics who like to raise money; however, there are even fewer smart politicos who don't acknowledge that it is critical to successful campaign efforts. The truth that candidates never want to hear is that the most important person in the fundraising operation for any candidate is the candidate himself/herself. And, even more so for first-time or unknown candidates, or, those running for less visible office.

The extent to which you will be able to raise enough funds to conduct a credible, winning campaign is in direct proportion to the amount of time you, personally, put into it. No one else can do it for you. Other people can help you do it, but, in the final analysis, you are the main cog in this effort. Fundraising should be your first priority. The candidate's time is precious and the candidate's first time priority must be call time.

Following are some proven techniques and suggestions to help you get organized and started in the quest for the precious campaign dollar.

NOTE: Before we get into the mechanics of fundraising, there is one housekeeping detail to be addressed. You must have a campaign committee, a treasurer and a bank account. No one can send you a donation without the name of a committee, and you can't deposit a check unless you have a campaign account. So, the first step is to take care of these details. File the appropriate paperwork with the election authorities which govern the office you are running for - State Board of Elections, FEC etc.

ALSO: There is no worse feeling than having a campaign stall or stop because of legal requirements that have not been met. Make sure that you and your campaign attorney know all of the rules about who you can raise money from, how much you can raise, and when and how the funds must be reported. Be meticulous in your record keeping and if you are in doubt about the propriety of taking a particular contribution, don't take it. In Illinois, contribution rules have changed recently. Make sure that you know the new laws.

BEGIN VIDEO:
Section One: Who Do You Know: Identifying and Cultivating Potential Campaign Donors (0:00)

Building Your Foundation. From the moment you decide that you might be interested in running for office, fiscal reality should set in. Money facilitates communication with your voters, so you have to have it. Case Closed. The question becomes, how do you get it.

There is an old story about someone asking legendary bank robber Willie Sutton why he

robbed banks. His answer: that was where the money was. In your own community and your own life, the first thing you need to do is to figure out the answers to these questions.

Think about the issues that you care about and the other candidates that you support. Go to fundraising events for these causes/candidates and meet people. Often supporters are listed on the event invitations. Keep these invitations and start meeting these people. They already have something in common with you, either a cause or a candidate, so you already have a place to begin your relationship with these potential donors.

Creating the List. You need a list of names to contact for money. The best source for this list is YOU.

The people who are most likely to give you money are people you know, people you went to school with or are related to you; these are the individuals who will comprise what we like to call your "dogcatcher" list. These people would give you money whether you are running for dogcatcher or president of the United States - they are giving money to YOU.

Make a list of the following: family, relatives, friends, neighbors, colleagues, members of organizations to which you currently belong and formerly belonged, classmates, your holiday card list. Record the person's name, address, business and home phone number, email and a point of reference - classmate, Bar Association member, etc.

After you've compiled this list, place a dollar amount next to the person's name (put each person in your database so that you can produce a contact sheet to help you maximize your call time). The dollar amount for each person should represent what you feel that you may realistically ask the person for. A good rule of thumb is to always ask for what you may feel is the maximum amount a person can give. For example, if someone is capable of writing a $500 check, ask for $500. Never ask for a lesser amount unless you sense that the donor will balk at the higher amount. If someone who is capable of writing a $500 check is asked only for $100, they will give only $100.

It may take you a few days or a week to compile this list but it is time well spent. It's they type of project you have to do only once, and it has to be done at the start of the campaign and then added to as you build your donor list.

Dividing the List. After you've compiled your list, the next step is to organize yourself is to contact the names and to divide your list in to large donors and smaller donors.

There are four main ways to contact people: in person, by telephone, by email and social media networks, or by mail. The three primary ways you will use are phone, email and mail because you will not have too much time to meet with people individually. However, you should meet with potential donors when you can, but only if they are capable of writing a large check and/or helping you to raise money from their contacts.

High dollar donors should all be called and smaller donors will go on your email, direct mail

and event list.

The Phone Call. When you call potential donors, be direct. Tell them why you're calling, explain why you're running and how important it is to you and to them, and always ask them to send in their contribution that day or the next day or to go online and contribute on your website.

Those individuals who know you best will probably be inclined to send you some donation because they have some kind of relationship, connection or history with you. You may not always get what you ask for or expect, but you should be able to get some contribution. This is very important because someone who gives you just $10 has, in effect, made a commitment to you and might be inclined to give you another donation later on in the campaign if for no other reason than to justify and reinforce their original contribution. So it is incumbent upon you to make sure that you always get some amount.

After you finish a call, you (or your aide) should make a notation next to the person's name such as "will send $25." If the donation is not received within one week, call them back to see if they sent it.

Maximizing the Phone Call. In addition to asking your donor list for money, you can also ask them for other things: you can ask them to raise money for you, you can ask them to help in the campaign and you can ask them to write a letter to everyone they know in your district and host an event. Many of the people you call, incidentally, will ask you if there is anything else they can do for you, so don't be bashful or hesitant to ask for more. Ask them for more names of people that you could call or for their help raising more for you. If your contacts are willing to raise money for you but don't know how to go about doing it, here is what you can tell them:

- Ask them to raise money for you from their own circle of friends, colleagues, clients, etc. In other words, their own list. They could send an email to their list or send a mail solicitation to them.
- They can call people directly, just as you're doing, and ask them to write a check for you or go to your website and donate.
- They can host a reception in your honor at their home or place of business. If they do this, you should insist on the following: the people who are being invited should know that they will be asked to write a check to your campaign, in other words, they're not being invited to a party, they're being invited to give money at a party. Also, it's always preferable to indicate a suggested donation on the invitation.

<u>Section Two: When people want to do other things for you (14:00)</u>

Events can build enthusiasm for your campaign and your war chest – but do it wisely!

1. Events - cocktail parties, dinners, house parties - are a less effective way of raising money because the time and effort involved is often not commensurate with the result, but if someone wants to host an event for you, don't say no. Following are some pointers to consider when planning an event.

2. House parties - House parties can be useful in attracting small donations and also for meeting people and recruiting volunteers for your campaign. If someone wants to have a party for you:
   • Persuade the host to pick up the entire cost of the event: invitations, postage, follow up phone calls, refreshments, entertainment (if any)
   • Make sure that the host is using his/her list of friends, neighbors, etc. You can provide additional names if asked, but the idea is for the hosts to use their own relationships with invited guests to raise you money.
   • The hosts may use printed invitations, email and phone calls to invite the guests. Regardless of how the inviting is done, all guests should know that the purpose of the event is to raise money for your campaign. Also, it doesn't hurt if the host mentions or lists a suggested minimum contribution.
   • Make sure that your host has ample copies of campaign literature and other event paraphernalia (buttons, bumper stickers, etc) on hand for the event.

3. Receptions, Dinners - These are events which are typically held at a catering hall or restaurant, and are intended to raise large-dollar contributions. Unless you're absolutely sure that a particular event will raise serious dollars, stay away from them. Why?
   • The fixed costs are high. You have to pay the caterer or restaurant. You will need email a few weeks in advance, and you might send printed invitations out far enough in advance to generate a turnout and you will incur postage costs.
   • Even with a so-called celebrity or special speaker, there is no guarantee that you will raise significant contributions.
   • Events involve a lot of work which detracts from the day-to-day activities of the campaign. You will become preoccupied with generating a turnout and ignore other activities.
   • After the event is held, it is your responsibility to ensure that all guests receive a "thank you" as quickly as possible via email or mail.
   • All other things being equal, you will raise more money from your personal phone calling.

<u>Section Three: Fundraising Time (17:19)</u>
It is incumbent upon you to set aside 3 to 4 hours each day to make your telephone calls. You have to discipline yourself to do this religiously every day, including weekends.

Generally speaking, the best time to reach someone at their place of business is the morning between 9:30 and 11:30 am or in the afternoon between 2:00 and 5:00pm. The best time to reach people in the evening is between 7:00 and 9:00pm.

If possible, it's helpful to have someone working next to you who can dial the numbers as you're finishing up a call and to make appropriate notes and comments next to a donor's name. It will make the calling run smoother and faster and you're less likely to lose or forget

information than you would be by working alone. You are also more likely to be more disciplined if someone is watching.

Don't give up call time – make sure it is scheduled and that it is done. No one gets paid if the campaign doesn't get paid!

Section Four: Keeping Track of Your Money (21:40)

You want to keep track of every single piece of information you have. It is very important to enter everything – even if you think it isn't important because it may be later on. For beginners a spreadsheet is fine, but it can be advantageous to invest in software. Even if you don't win, you can keep your database for next time or the next project or the next candidate. Keep track of where each name came from, associations are very important.

This doesn't just help keep track of donors, but how much money comes in and WHY you got it (i.e. internet, call time, event). It also shows that call time works, and can boost morale of the callers.

There will be plenty of times where your database is not convenient – use the old fashioned method and write it down. If you are at an even, and someone gives you an envelope with a check, use the back of the envelope to write their name, where they work, who they know, the event, the circumstances, who they were accompanied by, etc. ALL of that information can and must be entered in to the database at a later time.

Section Five: The candidate must make his own calls (30:30)

Staff can put the numbers together, enter the information, write the script, but it is imperative that the candidate get on the phone and make calls him/herself. Some staff may know people very well and that is ok, they can make calls, but you are running for office and so you must be the one to call.

Epilogue: Other Tips

Small Donors. Don't forget the little guy! Everyone can help your campaign. Even if someone can only give $5 or $10 they can be major players in your campaign. They can volunteer and they can solicit others for $5 or $10. Each small donor is a potential volunteer and a potential voter. Make sure to get these folks in your database. You can re-solicit small donors through out the campaign.

Direct Mail. Cast a wide net. Except for your own personal list, direct mail and email fundraising are less effective way to raise money. The only candidates who have any degree of success with direct mail and blast email are established political figures who have large donor bases. For your candidacy, it will be a waste of time and money. Use email to solicit people you know, but do not expect dollars to come streaming in just because you have a website.

Response Cards, Envelopes, Online donations. Make it easy to give. It's helpful for you to print up a batch of reply cards and return envelopes, and carry a dozen around with you. The card will simply list the name of your campaign committee and have spaces for a donor's name, address and phone number and amount. In your campaign travels, you will run into people who may want to contribute. If you can hand them a reply card or envelop that includes your campaign website; it will be easier for them to send in a donation physically or online. They can also be sent out as reminders to individuals who have made a commitment to contribute.