



Fundraising Guide

Making a Plan

Here are some suggested actions to get started on the financial planning portion of your campaign:

- Develop a finance plan with real numbers on a spreadsheet.
- Aggregate all your contacts and network to that same spreadsheet and prepare a script with how you are going to ask them for money.
- Make sure to schedule call time and call time goals, i.e., how much do you need to raise during that call time in order to reach your overall campaign fundraising goal?
- Develop and track how you will raise money.
- Make sure you plan for who is responsible for financial reporting. Your campaign needs to follow campaign finance law and be timely with your reporting – make sure these dates are on your calendar.

Getting Started

Before you start fundraising, make sure to do your research on how much you will likely need to run a successful campaign.

Federal, state and local governments have different means of acquiring financial campaign information (e.g., online versus in person). Here are some questions to get your research started:

- What did the previous campaigns raise and spend?
 - » How much was spent to win, including minimum and maximum amounts?
 - » How much was spent to lose, including minimum and maximum amounts?
 - » Where did the money come from?
- How was the money raised, spent and reported?
 - » What sources can you raise from (and what sources can you NOT raise from)?
 - » What can be in-kind and coordinated?
 - » When and how do you need to report?
 - » What can you spend on?

- How much do you think you can raise?
 - » Where can you fundraise large, medium and small amounts of money?
 - » Who will you target? Family, friends, elected officials, activists, allied organizations, opponent's opponents, other unions (including IAFF ones), etc.?
 - » How is your time fundraising best spent? Consider call time, events, mail, online, etc.
- What is your goal amount and what do you need to win?
 - » When do you think you will be able to raise your goal by?
 - » Make sure to track your progress: expected, identified/committed, in and left to goal
 - » Differentiate between hard commitments and soft pledges and make sure to collect hard money as soon as it is offered.
- How will you prioritize your time while fundraising?
 - » Schedule call times when you or your candidate will be most productive.
 - » Make sure to quantify your time and set a fundraising goal per hour.
 - » Track your hours to know where your time is going: hours scheduled, completed, calls per hour, contacts, commitments, etc.

Targeting

Before you start asking people for money, get organized. Make sure to aggregate all your contacts from all your different networks to the same spreadsheet or database to keep track of who you are calling, how you contacted them and how much money you are asking for. Prepare a script with how you are going to ask them for money. Below are examples of the different networks you need to target:

- Personal
 - » Family, friends, current/former colleagues
 - » Members of groups you are affiliated with
- Miscellaneous contacts
 - » Meet a new person? Add them
- Ideological
 - » Party donors, activists, elected officials

- Professional/Power
 - » Labor, environmental, healthcare, women's groups, etc.
 - » Corporate & PAC
- Anti-Opponent

Call Time

Call time is when you literally sit down and call your list of targets and ask them for money.

- Schedule call time with another person to help keep you on track and assist you.
- Be prepared before you start your calls.
 - » Research call sheets, talking points and contact info
 - » Identify ability, history, issues, asks and pitches
- Make sure to track your results on your call sheet or database: calls, left messages, call backs, notes on the conversations, etc.
- Send follow-up emails thanking, reminding or asking again.
- Schedule follow-up calls and arrange for payments.

Events

Events can be a great way to energize support and show interest in your campaign. However, events take up a lot of time, money and people, so be strategic with how many events you do.

- Evaluate which events will yield the most money and support using the least amount of time, money and people.
- Special events, like house parties, BBQs, etc., need to be planned ahead and have a specific fundraising goal.
- Keep in contact with hosts and follow up to make sure they are hitting the fundraising goal.
- Identify when money can be expected before the event. For example, 50% before, 25% day of, etc., and follow up.
- Set a realistic budget in comparison to fundraising goal and limit or eliminate overhead.

Other

There are many ways to fundraise. Make sure the ways in which you choose to fundraise are the most efficient and are tailored to your campaign's needs.

- Emails to family, friends and supporters can be less effective if they are not personalized.
- Online fundraising is growing, but online fundraising accounts sometimes have fees. Check for these and make sure to use the platform that is right for your campaign.
- Make sure all modes of fundraising, such as email and online fundraising, are scheduled and have a specific fundraising goal for each.
- If applicable, plan on how you will solicit federal, state and local PAC contributions and or party committee contributions.

Helpful Reminders

Here are some helpful reminders while laying out your fundraising plan:

- Spend early dollars wisely and remember, more money comes at the end of your campaign.
- Limit overhead and make sure to focus on voter contact.
- Have a plan you can afford and realign based on what you have raised.
- From your call script to emails, make sure you are staying on your campaign message.
- Plan your quarters and anticipate when money will come. Make sure this info is in your budget.
- Make sure to hit all your reporting deadlines. Keep track of all incoming and outgoing costs.
- Thank your donors. Then recruit them to volunteer to help on your campaign in other ways.

Questions or Need Assistance?

If you have any questions or need help with your campaign, please reach out to the IAFF Political Department and request assistance [online](#) or email politics@iaff.org.