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RUN AS YOU ARE

PART 2

How to Create a 2018 Finance Plan

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**Strengthening democracy
by unleashing the power of
women leaders through training,
technology, and community.**

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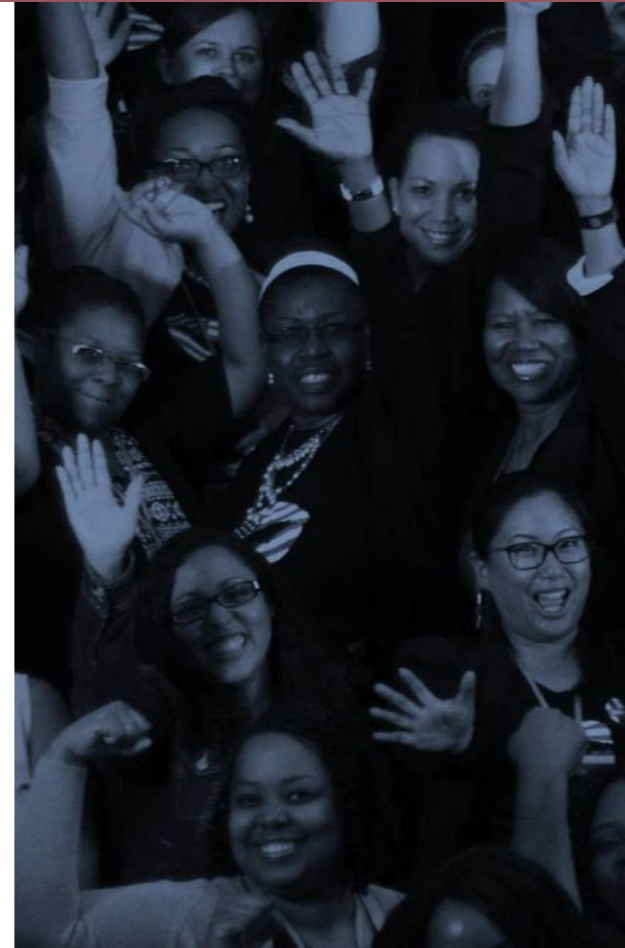
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ABOUT VOTERUNLEAD

VoteRunLead is a training powerhouse.

We match you with the right know-how, trainings and how-tos to help you enter politics with a purpose. Our approach is practical, actionable, nonpartisan and individualized. VoteRunLead members are sitting on school boards and in state houses all across America. Our candidates are diverse and dynamic. Our team knows how to support you; we are you. We know that who you are—your values and your life experience—make you an exceptional candidate. We believe in you and we feel the urgency you feel.

Get started with our [3 part web series here](#).



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WEB CLINICS

**VRL readies women to become
elected officials & civic leaders.**

**We do this through industry
partners & experts in our year-
long web series.**

**Check your email from us every
week for upcoming sessions!**



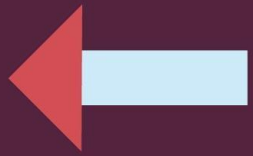
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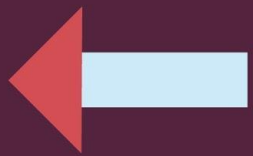
REPLAYS

**Today's web clinic will be
recorded & available for
on-demand viewing.**





CHAT BOX



Introduce yourself!

**Share tips, favorite links,
your Twitter handle, etc.!**

**Take advantage!
Ask your questions for our experts
& we will get them answered!**



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Stephanie Berger

TREASURER AND FOUNDING BOARD MEMBER

Stephanie Berger is a veteran of three presidential campaigns and an expert, teacher and trainer in the field of fundraising and non-profit development. Stephanie laid the groundwork for starting Berger Hirschberg Strategies by working for 16 years as a political fundraiser. She served as the California Finance Director for Al Gore's presidential campaign, Finance Director for the Democratic National Convention, Finance Director for John Kerry, and Vice President of Development for the Elizabeth Glaser Pediatric AIDS Foundation.

Throughout her career, Stephanie has launched successful strategies for high-profile political candidates and advocacy organizations, helping to elect public officials nationwide and elevating public awareness on critical issues, such as education and the environment. Stephanie not only designs and executes powerful fundraising and non-profit strategies, but she leaves her clients with the know-how and the permanent infrastructure required for them to fundraise over the long-term.

Stephanie is an adjunct professor at George Washington University for the Semester in Washington Program, serves as a Board Member of Harlem's IMPACT Repertory Theatre and is the Vice President of the Board of the Woman's Campaign School at Yale. Stephanie lives in New York, NY.

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Faith Winter

TRAINING COORDINATOR

Faith Winter is currently a Colorado State Representative, Executive Director of Emerge Colorado and consultant for VoteRunLead. Faith has spent her entire career inspiring people to action whether it is the thousands of women she trained to run for office at The White House Project, the young voters she turned out in 2004, or engaging her constituents on important issues facing Westminster.

In 2004 Faith was named one of 30 people under 30 showing political leadership by the Youth Vote Coalition, in 2008 she was named one of the top ten most influential women in Denver by the Denver Examiner, in 2010 she was named Woman of the year by Colorado Business and Professional Women northwest chapter, in 2012 she was named one of the up and coming women leaders to watch by the Denver Post, and in 2014 the Colorado Democratic Party named her rising star. Faith loves organizing because she believes the best way to create change is by building power through people. Faith is a VoteRunLead alum from Colorado Go Run.

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Fundraising 101

**“Politics has become so expensive that
it takes a lot of money even to be defeated.”**

-Will Rogers



**“There are two things that are important in politics. The
first is money and I can’t remember what the second one is.”**

– Mark Hanna

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Overview of Presentation



- **Fundraising/Marketing Strategies**
 - The Candidate/Organization
 - Target Prospects
 - Research Tools
- **Fundraising/Marketing Plan**
 - Finance Plan
 - Finance Tools
 - The Mechanics
 - FEC and State Regulations
 - Finance Department Structure
- **Conclusion**

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Fundraising Fundamentals Marketing Strategies

- **The Candidate/Organization**
 - Know what you are working with
- **Target Prospects**
 - Building your fundraising list
- **Research Tools**
 - Be resourceful

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The Candidate/Organization **“The Product”**

- Why do you believe in this organization’s mission?
- Why are you running?
- Assess Strengths and Weaknesses of Candidate and President of Organization
- Create **Your** Fundraising Message / Marketing Message
 - Who are you? Why can you win? Why are you better than the alternative?

Target Potential Donor Prospects Time vs Money

1. Personal friends, family, and close professional colleagues
2. The Power Circle
3. Prospects that share your ideological or organizational missions view
4. Prospects that have an ax to grind with your opponent



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Target List Template

[illegible]

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Resources For Research

- **Key Research Website**
 - www.opensecrets.org
- **Go to your Secretary of State's website**
 - Links to election commission section
- **The Yellow Book Leadership Directory**
 - www.leadershipdirectories.com

Big Donor Lists

- www.fortune.com
- www.forbes.com

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Fundraising Overview Marketing Plan

- **Finance Plan**
- **Fundraising Tools**
- **The Mechanics**
- **FEC and State Regulations**
- **Finance Department Structure**

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Finance/Development Plan

Why is it important?

- **Provides organization**
- **Defines roles and responsibilities**
- **Sets deadlines and goals**
- **Provides credibility for your campaign or organization**



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Finance/Development Plan

EVENT	DATE	LOCATION	TIME	HOST	Goal	Cmnt	IN	Out
September, 2007								
Individual Event 1								
PAC Event 1 (Industry Specific - only for Federal races)								
Non-Federal Corporate Event 1 (Industry Specific - only for non-Federal races)								
Individual Event 2								
PAC Event 2 (Industry Specific - only for Federal races)								
Non-Federal Corporate Event 2 (Industry Specific - only for non-Federal races)								
Prospecting Meetings (all month)								
Internet Fundraising								
Call Time (15 - 30 hours)								
Direct Mail								
TOTAL								

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Fundraising Tools



- Personal Solicitation by candidate, Board and surrogates
- Call Time
- Finance/BOD Committee Leadership
- Events
- Internet Fundraising
- Direct Mail, E-mail, & Phone Solicitation
- Marketing Materials
- Grassroots Fundraising
- PAC Solicitation

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Fundraising Tools

Personal Solicitation

- **Call Time** – Turn your time into money
- **Finance/BOD Committee**
- **Follow Up** – Stay in touch and build relationships

“The deepest principle in human nature is the craving to be appreciated.” – William James

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Fundraising Tools Call Time

- **Give them an update**
- **Make your case**
- **Make your ask**
 - To raise money, you have to ASK for money
 - Ask for More than You Think You Can Get
 - Get a firm commitment
 - Thank them and repeat the commitment
- **The Follow Up**
- **Call Time Simulation**

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Fundraising Tools

Finance/BOD Committee

- **Benefits**

- Increases Ability for Outreach – opens doors
- Decreases Pressure on Candidate's/Executive Director's Time

- **Tips**

- Recruit Committee/BOD Members Carefully
- Treat each member like YOU would like to be treated
- Give members the recognition they deserve
- Play it straight with members – they are your kitchen cabinet
- Give them specific goals
- Ask them to schedule CALL TIME as well

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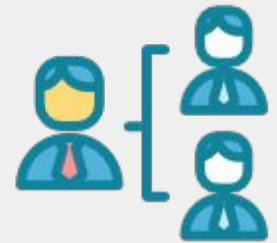
Fundraising Tools Follow Up

- **Each candidate/BOD/surrogate call should be followed up on**
 - Email follow up
 - Invitation / Contribution card
 - Marketing information
 - Staff follow up call
- **The candidate/BOD/surrogate should keep in touch with key people in the campaign**
 - Weekly conference calls

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Fundraising Tools Events

- Cultivates Donors
- Gives an Excuse to Contribute
- Set a Realistic Event Ticket Price
- Set a Realistic Budget
- Set a Realistic Fundraising Goal
- Coordinate the Timing of the Event
- Look for a Significant Draw
- Pay up Front
- Allow Time to Plan
- Be Creative



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Fundraising Tools On-line Fundraising

- **Design Your Website Right**
 - Make it easy to maneuver
 - Provide constant updates
 - Rememberenee@unitedstateofwomen.org – the website is a 24 hour / 7 day a week / 365 day a year representation of your campaign and candidate
- **Fill it to the Brim**
- **The Purpose of Your Site**
 - Collect information
 - Inform voters/donors
 - Raise money
- **Contacts**
 - Collect information on your visits to solicit contributions
 - Add the email addresses to your prospect list
- **Be proud of your site and advertise it**
 - Every article, all program news, every speech should mention the site



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Fundraising Tools

On-line Fundraising

How to raise money through the website

- **First visit contributors:**

- “[CLICK HERE TO CONTRIBUTE](#)”
- Make it simple and easy to give

- **Multiple visit contributors:**

- Informative email blasts to individuals with links to contribute
- “Break the bat” – The Dean method of motivation
- End of quarter contributions

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Fundraising Tools

Direct Mail & E-mail

- Re-solicit existing donors versus cold prospecting of new donors
- Follow up on invitations to events and meetings
- Solicit direct donations
- Follow up on outstanding pledges
- Direct Mail vs. E-mail



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Fundraising Tools PAC Solicitation

- **There are over 4,000 federally registered political action committees**
- **Ideological Partners**
 - Who would be interested in your campaign?
- **Incumbent vs. Challenger**
- **How to Target?**
 - Letter of Introduction
 - Follow up phone calls

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Marketing Materials

Have them ready and pass them out



- Press Clips
- Research findings
- Biographical pieces
- Polling/Program information
- List of Accomplishments
- “How We Can Win” Memo – Programmatic Impact Memo

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The Mechanics

Monitoring Income Projection vs Actual Receipts

- **Prospecting Chart**

- Prospecting Timelines – plan ahead for the upcoming quarter
- To track potentials

- **Weekly Cash flow Projection & Contribution Trackers**

- Stay organized – know your money and your systems inside and out
- Record keeping – copy every check



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The Mechanics Organization

- **Databases**

- i.e. NGP, Aristotle, Democracy in Action
- Track contributions, pledges, volunteer info, etc.
- Once created, your database is your greatest asset

- **Organization systems**

- Spreadsheets – keep on template

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FEC and State Regulations KNOW THE LAW

- Hire a compliance lawyer and trust them
- Obtain all legal advice in writing
- Know your state regulations and reporting deadlines
- Hire firm to handle all filing requirements
- In-kind contributions
 - Great way to save on cost



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Finance/Development Department Structure

- National Finance Director/Vice President of Development
- In-state Finance Director/Major Donor associate
- Deputy Finance Director/ Development Associate
- Finance Assistant/Database Manager
- Call Manager
- Finance Consultant – Senior Advisor



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Conclusion



- Think outside of the box
- Brainstorm with your staff and candidate
- Knowledge, confidence, organization and practice will make your candidate and campaign more successful

If you have any question, please do not hesitate to contact me at
Stephanie@bhstrategiesllc.com

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Join us!
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Facebook Group

THANK YOU

Vote Run Lead Alums
Closed Group

Discussion
Members
Events
Videos
Photos
Manage Group
Search this group

Write Post | **Add Photo/Video** | **Add File** | **More**

Write something...

RECENT ACTIVITY

Joyce Mason
16 hrs · Gurnee, IL

I did it! I won my election! I am an elected official!!!! Thanks again to Erin Vilardi and to all of the VRL Alums for your help along the way!

WOODLAND C.C. SCHOOL DISTRICT #50 MEMBERS OF THE BOARD OF EDUCATION-FULL 4-YEAR TERM (VOTE FOR 4)

35 of 35 Precincts Reporting

Detail Map

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A 3-Part Series

Part 1

Why the skills you have are perfect for political office.

Wednesday, April 5

6:30-8pm ET, 5:30-7pm CT, 4:30-6 MT, 3:30-5 PT

Part 2

The 90 Day Challenge: What to do right now.

Saturday, April 15th

2:30pm ET, 1:30pm MT, 12:30pm MT, 11:30am PT

Part 3

Your 2 Year Campaign Plan

April 26th, Wednesday evening

6:30-8:00 ET, 5:30-7:00 CT, 4:30-6:00 MT, 3:30-5:00 PT

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