

ADA Grassroots Action Team Network Resource Kit: Hosting a Fundraiser in Your Home

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I. Introduction

There is no more effective way to cement a good relationship with a lawmaker or potential lawmaker than to participate in his or her election or re-election campaign.

Most candidates take a very personal view of their election efforts, because their careers are at stake. If you make a financial investment in their campaigns, and/or volunteer your services, you will have an excellent chance of becoming one of their valued constituents and friends.

Fundraising events are very important to candidates for public office, because they serve a dual purpose in their campaigning efforts. Obviously, and most importantly, they help the candidate raise money.

Campaigning at the federal level is expensive, and can range from several hundred thousand to several million dollars a candidate. As a result, candidates must spend a significant amount of their time and energy focused on fundraising; even after they have been elected, they must retire debts and prepare for election almost immediately.

Therefore, they appreciate and remember those who have helped them in their efforts. Additionally, fundraising events, especially those held in the candidate's district, give him or her the chance to meet and talk with voters – an opportunity that will never be passed up!

Conducting a fundraising event for your candidate can be fun, and the ways to raise money are limited only by your imagination, the candidate's schedule, and a few legal considerations. More importantly, however, fundraising is an

investment in your candidate's career and future — something very serious to them — and an investment in the political future of dentistry. The friendship you and your fellow Action Team members develop with your lawmaker while organizing and conducting his or her fundraiser could have a positive and far-reaching impact on dentists, their practices, and their families.

Always consult with ADPAC, the ADA Washington office and your state and local dental societies before your Team decides to host a fundraiser. When each Team's activities in the ADA grassroots effort are coordinated, the profession will be much more effective and successful in achieving its legislative and political goals.

A. Advantages of Conducting a Fundraiser in Your Home

There are a wide variety of ways to host a candidate fundraiser, but one of the simplest and most effective is to host a fundraiser in your home. There are several advantages to conducting a home fundraiser:

- It makes a clear statement to your friends, your colleagues, and to the candidate that you are supporting his or her campaign and investing in his or her career.
- It can be more personal and intimate, and foster a closer relationship between you and your colleagues and the candidate.

- It will have more of an impact on the candidate. He or she will have been the guest of honor at a party you organized, and a guest in your home as well.

- It will give the candidate the opportunity to meet and speak on a personal basis with potential voters they might never have met otherwise.

Your Action Team is in an ideal position to host a home fundraiser and to further enhance your relationship with your U.S. Representative or with a challenger or open seat candidate who has a reasonable chance of getting elected.

The ADA Washington office is available to answer questions and give you guidance in conducting a successful and enjoyable event.

B. Legal Considerations

If you hold a fundraiser on behalf of a candidate for federal office, you must be aware of certain provisions in the federal election law. Staff at ADPAC will work with you to be sure you are in compliance. You and your spouse are permitted to spend up to \$2,000 as a couple (\$1,000 each) for costs of invitations, food and beverages when you hold a fundraiser in your home on behalf of a candidate without it being counted as a campaign contribution.

Further, you may make these expenditures in any single election, which means that you may host a fundraiser during the primary, during a run-off election, and again during the general election on behalf of a federal candidate. These expenditures do not count against the individual contribution limit of \$2,300 per candidate, per

election, which you also are permitted to make.

Contributions collected at your fundraiser that exceed \$100 must be made by check or money order. Contributions in cash are limited to \$100, and anonymous contributions are limited to \$50. Federal law requires that the name and address of the contributor and date of receipt for each contribution exceeding \$50 be forwarded to the candidate's campaign committee within 10 days of receipt. If you receive individual contributions in excess of \$200, federal law requires that the name and address of the contributor, occupation, name of employer, and the date of receipt must be forwarded to the candidate's campaign committee within 10 days of receipt.

Your candidate is required to report contributions received to his or her campaign to the Federal Election Commission which in the aggregate exceed \$200; however, you should be aware of these legal requirements when designing your fundraising invitations and RSVP cards to gather the appropriate information.

Legal requirements for state candidate fundraisers vary by state. Your state and local dental societies will assist you in compliance with state campaign finance laws. For further information on federal campaign contribution limits, visit the Federal Election Committee's Citizens' Guide:

<http://www.fec.gov/pages/brochures/citizens.shtml>

C. Planning the Fundraiser

Once you have decided to host a fundraiser in your home, your next step will be to decide what type of event you will sponsor.

Your primary goal is to raise the largest amount of money for your candidate for the least amount of work and expense. Since it is your home, your choices are limited only by your imagination, the candidate's schedule, and the size of your house!

A small, private event such as a dinner or reception with 8-12 Action Team members and spouses will allow the candidate to spend quality time with you and your colleagues to learn more about the issues that interest you and other dentists. It will also help you to solidify the close relationship you wish to establish with your candidate. Small events like this, however, may require high price tickets (more than \$200 each) to make this a successful fundraiser for the candidate.

Keep in mind that candidates like to meet a lot of potential voters, too. Consider hosting a barbecue in your backyard, a theme party, a cocktail reception, a breakfast or brunch buffet or a potluck supper to which you invite a large number of voters for the candidate to meet and address. The ticket price for an event aimed at a larger attendance should cost less. Charging \$25 - \$100 per person for events such as these could raise as much money for your candidate as your small dinner for high level contributors.

In deciding what type of event to host and what the ticket price should be,

consult with your candidate's campaign for advice as well as ADPAC and your state and local dental societies. Your event also might be dictated by the candidate's schedule and preference as to the kind of event. A variety of factors should be considered, e.g., incumbents may command a higher ticket price than non-incumbents; and incumbents who hold positions of leadership in Congress may be able to attract more dollars than those who do not. The campaign staff also should be able to advise you how to design an invitation response device that meets federal election law requirements.

D. Tips for Hosting a Successful Home Fundraiser

Be Organized Before the Event

The first step you should take in hosting a fundraiser in your home is to let the candidate know you would like to do it. On some occasions, the campaign staff may approach you and ask you to take on this assignment. But more often than not, you must take the initiative and contact the candidate and his or her campaign to let them know of your interest.

To arrange a fundraiser with the candidate, you should contact the candidate, the campaign manager, the fundraising chair and/or the campaign scheduler, depending upon how the campaign is organized.

Together you can determine the type of event to be held, and set a date and time.

Congressional candidates have very busy campaign schedules, so you will need to allow significant lead time of up to two months if at all possible. Make sure that the candidate can attend rather than a

surrogate representative of the campaign!

A critical step in organizing and planning a fundraiser in your home is to develop a steering committee to assist in selling tickets to the event, especially if you plan to have a large fundraiser. Your colleagues, friends, neighbors, and local political party activists are good choices to help out. Remember, the more people you involve on the steering committee, the better the odds that you'll have a good turnout to the fundraiser.

Be Organized at the Event

Although planning and organization are important in the days and weeks leading up to the event, they are critical on the day or evening of your fundraiser as well. As with any event that you host in your home, you want everyone to have an enjoyable time; so like any good host, you must work to keep things running smoothly. Developing an agenda for the event and following it in a flexible way is a good idea (see sample agenda).

During the course of the event, you should make sure that:

- The candidate has enough time to meet and speak with everyone attending the event, and that he or she does, in fact, speak to everyone. You should help the candidate circulate through the crowds and avoid being monopolized by just a few people. Anyone who has paid money to attend your event and leaves without meeting the candidate will be frustrated!

II. Fundraiser Timeline and Checklist

In planning any successful event, you will need to develop and follow a timeline for your fundraiser that details and sets deadlines for every activity to be completed. The following timeline can be used as a guideline and checklist.

Nine Weeks from Fundraiser

- 1. Confirm event with ADPAC and your state and local dental societies.
- 2. Determine the date, time, location and ticket price for the event in conjunction with the candidate/campaign staff.
- 3. Confirm the event and date in writing with candidate/campaign staff. (Sample letter provided).

Eight Weeks

- 1. Determine and recruit individuals to serve on the steering committee, and advise them to schedule the event on their calendars.
- 2. Select honorary chairs of the steering committee and secure approval to use their names on the fundraising invitations.
- 3. Draft invitation and seek appropriate approval. Work with ADPAC and campaign staff to ensure that the invitation and response card meets all legal requirements. (Samples provided).
- 4. Get cost estimates from printers for producing the invitations.
- 5. Compile invitation list:

- a. past contributors from the campaign
- b. lists of dentists and spouses in the district/community
- c. lists of physicians/others in the medical community
- d. business/industry lists
- e. targeted lists available from campaign
- f. neighbors and friends

6. Determine date and location of first steering committee meeting.

7. Send out meeting notice to steering committee members. (Sample provided).

Seven Weeks

1. Print invitations.

2. Purchase postage for invitations.

3. Recruit volunteers to address, stuff, stamp and seal invitations.

4. Draft and approve follow-up letter from a "name" individual. (Sample letter provided).

Six Weeks

1. Address, stuff, stamp, seal and mail invitations.

2. Conduct first steering committee meeting.

a. give each member five-ten invitations for personal recruitment

b. thank them for agreeing to assist

3. Print follow-up letter.

4. Determine location for phone bank.

5. Begin recruiting volunteers for phone bank.

Five Weeks

1. Follow-up with steering committee (phone calls and personal letters).

2. Recruit photographer and entertainment (if desired).

3. Stuff, stamp and seal follow-up letter from a "name" individual.

4. Determine date and location for second steering committee meeting.

Four Weeks

1. Write script for telephone bank (sample included), get materials and information sheets for phone bank.

2. Continue steering committee follow-up.

3. Follow-up with ADPAC to request a contribution to present to candidate at the fundraiser.

Three Weeks

1. Conduct second steering committee meeting.

a. Evaluate status of ticket sales, and what plan of action must be undertaken to meet fundraising goal.

Two Weeks

1. Follow-up steering committee progress.

2. Have phone bank make phone calls to all those invited who have not responded to invitations.

One Week

1. Continue to follow-up with steering committee.

2. Recruit volunteers for day/evening of event.

Day of Fundraiser

1. Check physical arrangements and logistics.

2. Secure materials for volunteers.

3. Set up a microphone (if needed).

4. Have name tags available.

5. Have a master list of invitees.

6. Display candidate's campaign material.

Fund-Raising Event

1. Have a table set up near the entrance of your home to take checks and pass out campaign literature.

2. Plan to introduce candidate to all attendees.

3. Plan for candidate to make approximately fifteen minutes of comments midway through the fundraiser.

4. Plan to present checks to candidate from attendees, host and/or ADPAC.

5. Allow the candidate to mingle freely with the guests and help avoid a few people dominating the candidate's time.

6. Make sure no one contributes more than \$2,300 legal limit to a federal candidate's campaign.

Post Fund-Raising Activities

1. Send all checks to the candidate's treasurer within 10 days (if not delivered at fundraiser).

2. Follow-up with a note of thanks to candidate for making the fundraiser a success, and reiterating your support for his/her candidacy. (Sample included).

3. Send thank you letters to steering committee and volunteers. (Sample letter included).

4. Follow up all pledges.

5. Put together financial report

6. Write up a summary of event with any recommendations concerning future fundraisers in the dental community.

7. Refine master list for next fundraiser.

8. Report back to ADPAC and your state and local dental societies.

III. Home Fundraiser Evaluation Form

The information below will be instructive for the ADA in helping other Action Teams that plan to host home fundraisers. Please complete and return this form as soon as possible after your fundraiser.

U.S. Congressional District: _____

Candidate For Whom You Sponsored the Fundraiser: _____

Date of Event: _____

Name and Address of Fundraiser Host: _____

Total Number of Attendees at the Event: _____

Ticket Price: _____

Total Amount of Personal Contributions Raised For Candidate: _____

Please rate the outcome of your home fundraiser:

Very Successful 1 2 3 4 5 Not Successful

What worked well in planning and conducting the fundraiser? _____

What would you improve, if you conduct another fundraiser? _____

Please provide any additional comments or suggestions: _____

Name: _____

Address: _____

Phone: _____

Please return this form to:

ADA Grassroots/ADPAC

1111 14th Street, NW, Suite 1200

Washington, DC 20005.

Your efforts in organizing this fundraiser will help ensure that the voice of dentistry is heard clearly in the U.S. Congress. The ADA, ADPAC and the members of the dental profession thank you for a job well done!

IV. Sample Communications

A. Sample Agenda for Home Fundraiser

45 minutes:

Introduce candidate to attendees and allow him/her to mingle and converse.

15 minutes:

Candidate addresses the group and responds to questions that the guests may have. If you are hosting a small dinner, this should be done when the meal is finished.

10 minutes:

Present candidate with checks from the attendees, the host, and ADPAC.

20 minutes:

Introduce candidate to any attendees he/she may not have met and allow him/her to circulate among guests.

Remember: Be flexible! Federal candidates on the campaign trail often have very full days and tight schedules of running from one campaign event to another. Be sensitive to your candidate and his/her time restrictions

B. Sample Letter to Candidate's Campaign to Confirm Event

Dear (Name of Campaign Manager):

My (spouse or colleagues helping with event) and I are delighted that (candidate's name) has agreed to be a guest in our home. As we discussed, we plan to hold a (type of event) in (his/her) honor, and request contributions of (amount) to attend. In accordance with (candidate's) schedule, we have planned our event for (date) at (time) at our house.

Directions to our home are enclosed. Over the next several weeks, our steering committee will be meeting and organizing the event, and I will stay in close touch with your office to keep you informed of how everything is progressing. I will also send an agenda for the event for your review and approval.

Please do not hesitate to contact me if you should have questions or suggestions. We look forward to a very enjoyable and successful (day/evening).

Sincerely,

(Your Name)

Enclosure: Directions

cc: ADPAC

Constituent Society

Component Society

C. Sample Invitation Letter to Event

Dear (Name):

As you may know, (candidate's name) is seeking (re-election/election) to be our U.S. Representative. As a strong advocate of issues important to both our profession and our community, I believe that (candidate's name) is uniquely qualified to represent our district.

You are cordially invited to attend a (reception/dinner/other) in (candidate's name) honor at my home on (date) and (time). This will be a great opportunity for you to meet and speak with (candidate's name), and to demonstrate the (profession's/community's) support for (his/her) work in Congress.

Please complete and return the enclosed reply card in the envelope provided to let me know if you can join us on (date). I look forward to seeing you.

Sincerely,
(Your name)

D. Sample Reply Card

- Yes, I will attend the (event) in honor of (candidate) on (date). Enclosed is my check for a contribution of \$(ticket price).
- Yes, I will attend the (event) in honor of (candidate) on (date), and will bring my contribution of \$(ticket price) at that time.
- I am unable to attend the (event) in honor of (candidate), but want to show my support. Enclosed please find my contribution of \$ _____.
- I am unable to attend the (event) in honor of (candidate).

Please Print:

Name _____

Mailing Address _____

City, State, Zip _____

Please make checks payable to: (candidate's campaign committee).

Federal law requires political committees to report the name, mailing address, occupation and name of employer for each individual whose contributions aggregate in excess of \$200 in a calendar year. Political contributions are not deductible for federal income tax purposes.

E. Sample Meeting Notice to Steering Committee

Dear (Name):

Thank you for agreeing to serve as a member of the Steering Committee for the (event) in honor of (candidate's name). As we discussed, the (event) will be held on (date) and (time) at my home.

Our Steering Committee will hold its first meeting on (date) at (time) at (location) in order to get started organizing our fundraiser. Please contact me to let me know if you will be able to attend.

(Candidate's name) and I both appreciate your willingness to participate in this event. With your help, I'm sure it will be a successful and enjoyable (day/evening.)

Sincerely,
(Your Name)

F. Sample Follow-Up Letter to "Invitees" From Specific Contact Person

Dear (Name):

Recently, you received a letter from (host's name) inviting you to a (event) in honor of (candidate's name). I am looking forward to attending this event on (date) and hope that you will be able to join us as well.

(Candidate's name) has shown tremendous interest in the issues that affect both dentistry and the community in which we practice, and a unique understanding of our concerns for our profession, our patients, and our families. (He/she) is very eager to meet and talk with more dentists and members of the community, and to learn more about the issues of importance to us.

I hope that you will take this opportunity to meet (candidate's name) and help show our (profession's/community's) support for (his/her) campaign. Again, the (event) will be held on (date) at (time) at (location). I look forward to seeing you there.

Sincerely,
(Your Name)

G. Sample Thank You Note to Candidate After Event

Dear (Candidate's Name):

My (spouse and/or colleagues) and I would like to thank you for being our guest at (event). I believe that the (day/evening) was a great success and an enjoyable time for everyone.

As a dentist and a member of the community, I feel that you have a very thorough understanding of the issues important to our profession and our district. I would be very proud to have you represent us in the U.S. Congress.

Please do not hesitate to contact me or any of my colleagues if we can provide you with further help or information. I wish you continued success in your campaign, and look forward to meeting with you again soon.

Sincerely,
(Your Name)

cc: ADPAC
Constituent Society
Component Society

H. Sample Thank You Letter to the Steering Committee

Dear (Name):

I would like take this opportunity to thank you for serving on the Steering Committee for the (event) for (candidate's name). All of your hard work and support paid off — the evening was a great success for (candidate's name) and an enjoyable time for everyone!

(Candidate's name) has expressed (his/her) deep appreciation for our fundraising efforts, and having the opportunity to meet with many of us from the (dental) community. I believe that our (event) will go a long way toward helping to make (his/her) campaign a success.

I hope that you will continue to take opportunities to show support for (candidate's name) and communicate with (him/her) on issues of concern to you when (he/she) is (elected/re-elected) to the U.S. Congress. Once again, thank you for all your help.

Sincerely,
(Your Name)

I. Sample Script for Telephone Bank

Hi. This is (your name). I'm calling on behalf of the ADA Action Team in our district which is actively involved in politics to promote dentistry's views on issues among our elected officials. We are also trying to help out (candidate's name), who is running for (election/re-election) to be our U.S. Representative.

I'm calling to follow-up an invitation that was sent to you to attend a (event) in (candidate's) honor.

The (event) will take place at the home of (host's name) on (date) at (time). (candidate's name) will be there, and you'll have a chance to meet and talk to (him/her.) We'd also like

to ask that you show your support for (candidate's name) campaign with a contribution of \$ _____.

If person remembers receiving the invitation and still has it: Do you think you will be able to join us on (date)?

If yes: Great! I will make sure your name is placed on the attendees list, and I'm sure (candidate's name) will look forward to seeing you there. You may mail your contribution in the envelope enclosed with your invitation today, or bring it with you to the event.

If no: I'm sorry you won't be able to attend, but hope you'll still want to show your support for (candidate's name) by sending a contribution. this is a great opportunity for the dentists in our community to make a real impact with (candidate's name), and your contribution will help to make this event a real success.

If person doesn't remember invitation or has lost it: If you'd like, I'll make sure that you receive another invitation in the mail in a day or two. I hope that you will be able to join us. (Take down person's address and make sure you send information as soon as possible.)

If person still needs time to think about it: I understand. I hope that you'll give it some thought and decide to join us. It should be a fun and informative evening for all of us. Thank you.

Make a note of the person's response and report all responses, positive and negative, to the steering committee chairs.