

FINANCE PLAN OUTLINE

I. Candidate analysis

- A. Who knows your candidate?
 - 1. Previous donors
 - 2. Past schedule/calendar
 - 3. Holiday card list
 - 4. Professional achievements
 - 5. Rolodex/Outlook
 - 6. Club memberships
- B. Who likes your candidate?
- C. Who dislikes your candidate?
- D. What issues has she championed? (personally or professionally)
- E. What legislation has she sponsored?
- F. Who are her political allies?
- G. What organizations does she belong to?
- H. What family ties will hurt or help fundraising?

II. Campaign analysis

- A. Type of race: incumbent, open seat or challenger
- B. What is your candidate's perceived viability?
- C. Primary or general: how many and what type of opponents
- D. Legal Limits
- E. Assumptions about candidate's activities

III. Donor groups

- A. Make a list of donors or groups of donors targeted for solicitation
- B. What circle of benefit does each donor or group of donors fall in?
- C. What message will you use with each donor or groups of donors?
- D. What tools best fit this group?
- E. How much will you raise from each group?
- F. Who will solicit them?

IV. Projecting income

- A. Figure out the total number of prospects per donor group (N)

- B. Figure out what tool you will use to solicit each member of the donor group (candidate call or visit, event, internet, direct mail, resolicitation, etc.)
- C. Multiply the number of prospects by the assumed response rate for each tool ($N \times .60$ for call time, etc.=R)
- D. Estimate what the average contribution will be for tool (A)
- E. Multiply the estimated response rate, R, by the estimated average contribution, A, to equal the projected income for each donor group ($R \times A = I$)

V. Campaign calendar

- A. How much call time will you need per week, per month or per quarter? **BLOCK THIS TIME.**
- B. Create an event schedule
- C. Create a schedule for direct mail creation and drops
- D. The fundraising schedule should revolve around finance report deadlines
- E. All tool activities should take into account the assumptions about cash flow

VI. Donor research

- A. Who are the largest employers in the district/state?
- B. Read local newspapers and business journals
- C. Look at the political landscape
- D. Look at the demographics of the district: ethnic, social, cultural, religious