



Appendix B: Finance

- Call Time Tracking & Follow up Sheets
- Sample Campaign Budget

Call Sheet

TARGET: \$ _____

Source:

Name: _____ Work Phone: _____

Spouse: _____ Home Phone: _____

Address: _____ Email: _____

_____ Occupation: _____

_____ Employer: _____

_____ FAX: _____

County: _____

Notes:

Date: _____ Completed Call: _____ L/M: _____ Call Back: _____ Other: _____

Date: _____ Completed Call: _____ L/M: _____ Call Back: _____ Other: _____

Date: _____ Completed Call: _____ L/M: _____ Call Back: _____ Other: _____

Date: _____ Completed Call: _____ L/M: _____ Call Back: _____ Other: _____

Date: _____ Completed Call: _____ L/M: _____ Call Back: _____ Other: _____

Ltr / Fax/Email: _____ Ltr / Fax/Email: _____ Ltr / Fax/Email: _____

Ltr / Fax/Email: _____ Ltr / Fax/Email: _____ Ltr / Fax/Email: _____

Received/Date: _____ Received/Date: _____ Received/Date: _____

Received/Date: _____ Received/Date: _____ Received/Date: _____

Sample Call Tracking Sheet

	Hours Called	Hours Scheduled	Calls Completed	Messages Left	Hard Yes	No	Total Amount Raised
Morning							
Afternoon							
Evening							

Sample Pledge Follow up Tracking Sheet

Last Name	First Name	Date Pledged	Amount Pledged	Follow up Letter Sent	Follow Up Call Made	Date Received	Amount Received	Date Thank You Sent
Hasan	Arshad	5/4/2006	\$500	5/5/2006		5/9/2006	\$250	5/10/2006
Hughes	Tom	5/4/2006	\$400	5/5/2006				
Dean	Jim	5/4/2006	\$500	5/5/2006			-	
Strain	Helen	5/4/2006	\$250	5/5/2006	5/15/2006			
Coken	Jennifer	5/4/2006	\$250	5/5/2006	5/15/2006			
Hodge	Talesha	5/4/2006	\$1,000	5/5/2006		5/12/2006	\$500	5/13/2006
Honeycutt	BJ	5/4/2006	\$1,000	5/5/2006		5/10/2006	\$1,000	5/11/2006
Mossman	Mike	5/4/2006	\$250	5/5/2006				
Bradley	Chuck	5/6/2006	\$1,000	5/7/2006				
Crott	Annette	5/6/2006	\$100	5/7/2006			\$100	
Watson	Simon	5/6/2006	\$1,000	5/7/2006	5/17/2006	5/20/2006	\$500	5/21/2006
Cohen	Mitch	5/6/2006	\$200	5/7/2006				
Strapper	Jack	5/6/2006	\$200	5/7/2006				
Lindolen	Linda	5/6/2006	\$600	5/7/2006				
Derden	Courtney	5/11/2006	\$2,500	5/12/2006		5/14/2006	\$2,500	5/15/2006
Eisensteil	Carla	5/11/2006	\$250	5/12/2006				
Sorty	Desmond	5/11/2006	\$500	5/12/2006				
Hillen	Amanda	5/11/2006	\$2,500	5/12/2006				
Abraham	Robin	5/11/2006	\$1,000	5/12/2006				
Mittrand	Alice	5/11/2006	\$500	5/12/2006				
TOTALS			\$14,500				\$4,850	

Sample Target Amount Tracking Sheet

Last Name	First Name	Target Amount	Pledge Amount	Actual Amount	% Pledged	% Received
Hasan	Arshad	\$500	\$500	\$250	100%	50%
Hughes	Tom	\$1,000	\$400	\$0	40%	0%
Dean	Jim	\$5,000	\$500	\$0	10%	0%
Strain	Helen	\$500	\$250	\$0	50%	0%
Coken	Jennifer	\$500	\$250	\$0	50%	0%
Hodge	Talesha	\$5,000	\$1,000	\$500	20%	10%
Honeycutt	BJ	\$2,500	\$1,000	\$1,000	40%	40%
Mossman	Mike	\$500	\$250	\$0	50%	0%
Bradley	Chuck	\$2,500	\$1,000	\$0	40%	0%
Watson	Simon	\$2,500	\$1,000	\$500	40%	20%
Cohen	Mitch	\$500	\$200	\$0	40%	0%
Strapper	Jack	\$500	\$200	\$0	40%	0%
Lindolen	Linda	\$1,000	\$600	\$0	60%	0%
Derden	Courtney	\$5,000	\$2,500	\$2,500	50%	50%
Eisensteil	Carla	\$500	\$250	\$0	50%	0%
Sorty	Desmond	\$1,000	\$500	\$0	50%	0%
Hillen	Amanda	\$5,000	\$2,500	\$0	50%	0%
Abraham	Robin	\$2,500	\$1,000	\$0	40%	0%
Mittrand	Alice	\$500	\$500	\$0	100%	0%
TOTALS		\$37,500	\$14,500	\$4,850	39%	13%

Sample Campaign Budget

<u>CAMPAIGN BUDGET</u>	April	May	June	July	August	September	October	November	December	Totals
Target to raise	\$25,000	\$30,000	\$45,000	\$90,000	\$75,000	\$125,000	\$140,000	\$20,000	\$0	<u>\$550,000</u>
<u>Non Voter contact:</u>										
Campaign Manager	\$2,500	\$2,500	\$2,500	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	
Office Manager/ Assistant					\$500	\$1,000	\$1,000	\$50		
Candidate expenses	\$250	\$250	\$500	\$500	\$1,000	\$1,000	\$1,000	\$250		
Office Rental	-	-	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000		
Telephones	\$80	\$80	\$500	\$150	\$200	\$300	\$300	\$150		
Internet	\$25	\$25	\$400	\$100	\$250	\$250	\$250	\$150		
Electricity/Water			\$150	\$45	\$75	\$75	\$75	\$45		
Equipment and Rentals	-	-	\$100	\$75	\$150	\$150	\$150	\$50		
Staff Mileage	\$50	\$50	\$75	\$125	\$250	\$250	\$250	\$75		
<u>Fundraising</u>										
Finance Director	\$2,000	\$2,000	\$2,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	
Finance Assistant						\$1,000	\$1,000	\$1,000		
Catering	-	-	-	\$200	\$50	\$500	\$500	-		
Venue Rental	-	-	-	\$200	-	\$400	\$200	-		
Event Insurance				\$250		\$500	\$500			
Postage	\$500	\$500	\$2,000	\$1,000	\$500	\$3,000	\$1,500	\$1,500	\$2,000	
Mailing/TY Supplies	\$500	\$200	\$1,800	\$150	\$1,000	\$2,500	\$800	\$1,500	\$1,800	

Sample Campaign Budget (cont.)

<u>Overhead Expenses</u>										
<u>Voter Contact</u>	-	-	-	-	-	-	-	-		
Field Director	-	-	\$1,500	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	
GOTV Staff	-	-	-	-	-	-	\$1,000	\$1,000		
Brochures/palm cards		\$5,000		\$3,000	\$2,000	\$2,000	\$2,000	\$500		
Newspaper Ads	-	-	\$125	-	\$250	\$1,250	\$1,750	\$125		
Direct Mail	\$750	-	\$750	\$750	\$750	\$1,250	\$1,000	\$250		
Radio	-	-	-	\$2,500	\$4,500	\$9,000	\$9,000	\$3,125		
TV					\$35,000	\$75,000	\$185,000	\$75,000		
Internet	\$325	\$325	\$650	\$650	\$1,300	\$1,350	\$650			
Voter files	-	\$50	\$75	-	\$150	\$150	\$250	\$50		
Walk lists	-	\$25	\$50	-	\$100	\$100	\$100	-		
Door hangers	-	-	-	-	-	\$650	\$3,250	-		
Lawn signs	-	-	-	-	\$550	\$1,100	\$550	-		
Outreach expenses	\$65	\$65	\$125	\$125	\$250	\$250	\$250	-		
Training	\$225	\$225	-	\$450	-	\$450	-	-		
Recognition incentives	\$50	\$50	\$100	\$100	\$200	\$200	\$200	\$50		
Meals and Snacks	\$50	\$50	\$100	\$100	\$200	\$200	\$200	\$50		
Other	\$25	\$25	\$50	\$50	\$100	\$100	\$100	\$25		
<u>Total Expenses</u>	<u>\$4,895</u>	<u>\$8,920</u>	<u>\$12,050</u>	<u>\$16,020</u>	<u>\$54,325</u>	<u>\$108,475</u>	<u>\$217,325</u>	<u>\$90,395</u>	<u>\$11,300</u>	<u>\$523,705</u>
<u>Total Actual Revenue</u>										
<u>Cash on Hand</u>										



Appendix C: Communications

- Sample Press Advisory
- Sample Press Release

The News Advisory

A news advisory (also called a 'press advisory') serves as a notice or invitation to the media for an event. This is a brief, simple document stating the facts. It has the information necessary for the reporter to get to the event and a brief blurb to hook the reporter. It lists what, when, where, and who. The advisory will note any photo and interview opportunities for the media. The organization, send date, contact info, and "NEWS ADVISORY" are clearly marked at the top. Advisories are sent out a few days to a week before the event and the morning of the event.

Always follow up News Advisories with pitch calls. During the call, ask if the reporter has received it (be assertive, ask them to check and see if it went through. That way, they're likely holding it in their hand as you pitch to them). Advisories can also serve as a notice for a candidate's public schedule.

Sample News Advisory



Immediate Release:
November 4, 2005

Contact: Danny Medress,
802-651-3200 x.148,
media@democracyforamerica.com

Democracy for America Chair Jim Dean to Rally with Ohio Supporters and DFA-List Candidates

COLUMBUS, OHIO – Jim Dean, Chair of Democracy for America, will be in Columbus, Ohio on Sunday, November 6 at 10:00 AM to attend a Get-Out-The-Vote rally with Paul Hackett and Columbus City Council candidates Kevin Boyce, Mary Ellen O’Shaughnessy and Mary Jo Hudson. The rally is being coordinated by Democracy for America – Central Ohio, a grassroots organization dedicated to political activism.

Boyce, O’Shaughnessy, and Hudson are on the "DFA-List," fiscally responsible, socially progressive candidates endorsed by Democracy for America.

Who: Jim Dean, Chair of Democracy for America,
Paul Hackett, former US House Candidate
Columbus City Council Candidates Kevin Boyce, Mary Ellen O’Shaughnessy and Mary Jo Hudson

What: Get Out the Vote Rally

When: Sunday, November 6, 2005 at 10:00 AM

Where: I.B.E.W. Hall
23 W. Second Avenue
Columbus, OH

Democracy for America is a political action committee founded by Governor Howard Dean. DFA is dedicated to building a grassroots network that supports fiscally responsible and socially progressive candidates for all levels of office.

###

Components of Your News Advisory

← Letterhead [optional]

← **Release Type, Date, and Contact Line**

← **Head**

← **Brief, factual blurb**

← **Who**

← **What**

← **When**

← **Where**

← **Org Info**

← **End Marker**

The News Release:

News releases (also called ‘press releases’) are news stories put out by the campaign or organization. They are from the perspective of the campaign itself –the story the way you want to see it published. Campaigns put these out to assist the reporter writing the story by providing material and point of reference. News releases are also a good way to release a statement. Ideally, the outlet will take the release and paste portions directly into the story (more likely for smaller, understaffed papers). Carefully writing and formatting the release makes it easier for the outlet to do this.

For media events, a campaign should only distribute a news release during or after the event. This is an important distinction between the advisory and the release; the advisory draws them to the event and the release is what they get for coming. The release is written in past tense. This helps the reporter remember your version of the event. Afterward, the news release is distributed to all the outlets which did not appear. Most of your media hits will be from outlets who did not show up to the event, but with whom you did a thorough follow-up. The news release allows reporters to cover the story even if they could not show up.

Check for spelling, typos, punctuation, and so on. This sounds simple, but in the heat of a campaign it can be overlooked. Establish a system to have another person edit your press releases. An outlet will judge the professionalism of your campaign based on your news release.

News releases are simple, short, and consistent. You will almost never need to exceed two pages (though you might include secondary information such as research in a press packet). As with all communications, your news release will include your message.

A news release should be clearly and explicitly designated as such. The words “FOR IMMEDIATE RELEASE” should be in the upper left hand corner and your contact info (name, phone numbers, Email) in the upper right hand corner. The release is written like a story and starts with a headline (and optional subhead). The lead paragraph should include a ‘hook’ (something catchy or interesting) in the first line and should include all the basic facts – who, what, when, where, why. The next couple of paragraphs will have a quote and further explanation, followed by supporting material, and possibly other quotes. The news release ends with a centered series of pound signs, “###” to indicate the end. If your release must exceed two pages, each page ends with a centered “-more-” or “- 1 of 2 -” until the final page. Factual references should be cited, or better, included in the media packet.

Sample Press Release



FOR IMMEDIATE RELEASE
Thursday, December 20, 2007

Contact: Daniel I. Medress
(802) 651-3200, ext. 148

DEMOCRACY FOR AMERICA ENDORSES DARCY BURNER FOR THE UNITED STATES HOUSE OF REPRESENTATIVES

BURLINGTON, VT – Democracy for America, our nation’s largest progressive political action organization, has endorsed Darcy Burner’s campaign to represent Washington’s Eighth Congressional District.

“Darcy Burner is a strong progressive candidate and Democracy for America is proud to endorse her campaign for Congress,” said Jim Dean, Chair of DFA. *“Ms. Burner’s opponent has stood lockstep with President Bush on the War in Iraq and virtually every issue of concern to the residents of the Eighth District. Darcy Burner is the best and most qualified candidate running.”*

Darcy Burner grew up in a blue-collar military family and is the wife of an Army veteran and the sister of a veteran of the War in Iraq. Her family history, experience as a businesswoman in the technology sector, and commitment to her constituents make her the ideal candidate for this district.

Democracy for America is the key endorsement in this race; bringing hundreds of donations from progressives and providing volunteers to participate in door-to-door, grassroots outreach. The DFA Training Academy has trained tens of thousands of activists across the country in the strategies and tactics of successful campaigns and will be coming to Bellevue, WA this February.

“Democracy for America is supporting Darcy Burner because she supports progressive values like ending the War in Iraq, protecting the economic well-being of working men and women, and breaking our addiction to oil. DFA will stand with candidates who stand up for progressive values.” said Arshad Hasan, Executive Director of DFA.

For more information or to schedule an interview with Chairman Jim Dean or Executive Director Arshad Hasan, please contact Daniel I. Medress at 802-651-3200, ext. 148

###

Components of Your Press Release

← Letterhead
[optional]

← Release Type,
Date, and Contact
Line

← Head
← Subhead

← Dateline, Lead,
and Body

← Quote

← Contact

← End Marker