



Appendix B: Finance

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

Call Sheet

Campaign Phone number
Campaign Web site
Campaign Mailing Address

ASK: \$ _____

Name: _____ Work Phone: _____

Spouse: _____ Home Phone: _____

Address: _____ Email: _____

_____ Occupation: _____

_____ Employer: _____

Previous donations to campaign: _____

Other contribution history: _____

Call 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: _____

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	Thank You Sent
Hasan	Arshad	5/4/2009	\$500	5/5/2009		5/9/2009	\$250	5/10/2009
Hughes	Tom	5/4/2009	\$400	5/5/2009				
Dean	Jim	5/4/2009	\$500	5/5/2009				
Strain	Helen	5/4/2009	\$250	5/5/2009	5/15/2009			
Coken	Jennifer	5/4/2009	\$250	5/5/2009	5/15/2009			
Hodge	Talesha	5/4/2009	\$1,000	5/5/2009		5/12/2009	\$500	5/13/2009
Honeycutt	BJ	5/4/2009	\$1,000	5/5/2009		5/10/2009	\$1,000	5/11/2009
Mossman	Mike	5/4/2009	\$250	5/5/2009				
Bradley	Chuck	5/6/2009	\$1,000	5/7/2009				
Crott	Annette	5/6/2009	\$100	5/7/2009			\$100	
Watson	Simon	5/6/2009	\$1,000	5/7/2009	5/17/2009	5/20/2009	\$500	5/21/2009
Cohen	Mitch	5/6/2009	\$200	5/7/2009				
Strapper	Jack	5/6/2009	\$200	5/7/2009				
Lindolen	Linda	5/6/2009	\$600	5/7/2009				
Derden	Courtney	5/11/2009	\$2,500	5/12/2009		5/14/2009	\$2,500	5/15/2009
Eisensteil	Carla	5/11/2009	\$250	5/12/2009				
Sorty	Desmond	5/11/2009	\$500	5/12/2009				
Hillen	Amanda	5/11/2009	\$2,500	5/12/2009				
Abraham	Robin	5/11/2009	\$1,000	5/12/2009				
Mittrand	Alice	5/11/2009	\$500	5/12/2009				
TOTALS			\$14,500				\$4,850	

Sample Call Tracking Sheet

	Hours Called	Hours Sched.	Calls Completed	Msgs. Left	No	Hard Yes	Daily Raise Goal	Total Raised	Avg. Raised per hours called
Monday									
Tuesday									
Wednesday									
Thursday									
Friday									

Sample Campaign Budget

	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Totals
Target to raise	\$25,000	\$35,000	\$65,000	\$95,000	\$50,000	\$135,000	\$150,000	\$20,000		\$575,000
										-
Non Voter contact:										
Campaign Manager	\$2,500	\$2,500	\$2,500	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	
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	\$650		
Internet	\$25	\$25	\$400	\$100	\$250	\$250	\$250	\$150		
Electricity/Water			\$150	\$45	\$75	\$75	\$75	\$100		
Equipment /Rentals	-	-	\$100	\$75	\$150	\$150	\$150	\$250		
Staff Mileage	\$50	\$50	\$75	\$125	\$250	\$250	\$250	\$75		
Fundraising										
Finance Director	\$2,500	\$2,500	\$2,500	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	
Finance Assistant					\$1,000	\$1,000	\$1,000	\$1,000		
Catering	-	-	-	\$200	\$50	\$500	\$500	-		
Venue Rental	-	-	-	\$200	-	\$400	\$200	-		
Event Insurance				\$250		\$500	\$500			
Postage	\$500	\$500	\$2,500	\$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.)

Voter Contact	-	-	-	-	-	-	-	-	-	-	-
Field Director	-	-	\$2,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$1,000	
Field Deputy						\$1,000	\$1,000	\$1,000	\$1,000		
GOTV Staff	-	-	-	-	-	-	\$2,000	\$2,000	\$2,000		
Brochures/palm cards		\$5,000		\$3,000	\$2,000	\$4,000	\$3,000	\$500			
Postage				\$2,000			\$4,500				
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	\$300	\$100			
Other	\$25	\$25	\$50	\$50	\$100	\$100	\$100	\$25	\$1,000		
Total Expenses	\$5,395	\$9,195	\$13,775	\$19,020	\$56,325	\$112,475	\$225,925	\$94,200	\$12,800	\$549,110	
Total Actual Revenue											
Total Actual Expenses											
Cash on Hand											



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

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

