

How to Organize a Major Fundraising Event



Liberal University
Université libérale

The Importance of Fundraising

No Money, No Campaign

The time to raise money is now, not when the writ is dropped for the next election. We are still very popular but that will not continue indefinitely. By raising money now, we will get an advantage on the opposition by being ready to go with both pre-writ and post-writ campaigns.

If you don't do it now, then when? If not you, then who?

It's There – You Just Have to Find It

Some Liberals say that their ridings are poor and they can't raise a lot of money. I say that is not true. Take a look at Glengarry–Prescott–Russell, represented by the Honourable Don Boudria, or the Algoma–Manitoulin riding, formerly represented by Maurice Foster, and now by Brent St. Denis. Both are mainly rural ridings without a lot of businesses in them. Yet they are able to raise money.

You must tailor your fundraising to appeal to the people of your riding. In large centres, you can organize a high priced event. In smaller centres or rural ridings, you may have to look at lower ticket prices, but you can likely do more events. In both instances a Cheque Mate/Century Club program will work.

Profile and Networking

There are some added benefits to fundraising apart from the money. It gives your organization some profile in the community, and gives your Member of Parliament and riding people an opportunity to network with supporters and business people.

Preliminary Steps

The Draw

The first thing is to get a guest speaker or other drawing card that will appeal to potential ticket buyers. You must look at whether to have a political figure or not. If you go the non-political route, what will you do?

In London several years ago, we asked the Royal Canadian Air Farce to come in. They sent two of their members (Roger Abbott and Don Ferguson) and it was a great evening. Mind you, it cost us \$3000.00 (and it would no doubt be much more today). Another riding put on a concert. There are all kinds of other non-political ideas – use your imagination!

For now, we will concentrate on a political event, whether it is a dinner or reception.

Clearly you will need someone who can raise interest in your riding. There are some ministers who are popular anywhere. Other ministers will have a limited appeal depending on the riding. The time to start looking is six months before your planned event. If you are in a Liberal held riding, ask your Member of Parliament about the best way to approach your guest.

The Date

The date may depend on the availability of your guest. Get some dates when your guest is available and see if the facilities you want are available.

Try to arrange the date for a week when the House is not sitting. You can then avoid the possibility of a vote or debate in the House requiring your guest's attendance.

As far as the day of the week goes, it may depend on the kind of event and the riding you are in. For a big-ticket fundraiser, Thursday nights are often the best. You may find that other days are best in your riding. Ask other organizations who do fundraising what their experience is like.

The Location

The location is key. You want a place that is in your riding, can provide good food and is the right size. This is often a tall order. If you are not familiar with all the potential sites, ask around.

Size is very important. The room must look full. If your location is too big, find out if you can block off part of it somehow, using dividers, curtains or sliding doors. You can also use balloons, sign trees or other decorations to fill up the room.

You also want:

- easy access
- good parking
- good food at a reasonable price
- approval to decorate
- a good sound system
- an elevated area for the head table
- a side room for the head table to gather
- a bar.

The Participants

Another issue that must be addressed is what ridings will take part. Will it be your riding only or will it involve other federal Liberal riding associations?

Generally speaking, the more ridings participating, the more prominent a guest speaker you will be able to get.

If it is a group effort, set the ground rules from the start. Will the profits be divided equally or will they depend on who sells the tickets? Generally, fewer problems arise if the profits are split equally, as long as all ridings pull their weight in the work department. If the profits depend on who sells the tickets, you will end up with the various ridings chasing the same people to buy a ticket.

The Accountant

Another preliminary issue to deal with is who will look after the money. An accountant will be helpful but not necessary. A riding treasurer who knows his or her stuff can easily do the job.

Make sure that if you have a multi-riding event, you open separate bank accounts to keep track of the proceeds. Also make sure that the accountant understands that you want tax receipt information sent to the Provincial/Territorial Association or LPC (depending on the province or territory) within 30 days after the event.

The Chair

Your chair is the linchpin of the whole dinner. He or she will be co-ordinating everything. It is best if he or she has staff support to handle the ticket requests as they come in. Usually a prominent business person or

professional has these resources. You will also want the Chair to make a lot of phone calls on your behalf to sell tickets. Line up your chair right at the beginning, even before you arrange your speaker.

The Lists

Existing Lists You Need

The next step is to consider who gets invitations. If you plan a high priced event, you should concentrate on past donors, and not on your average Liberal. If you are planning a lower priced event, both past donors and Liberals should be invited.

Expanding Your Base – New Lists

We must all be conscious of expanding our base of financial support. Look for other sources of names such as the local Chamber of Commerce. Go to City Hall and ask if they have a list of the largest employers or businesses in the community. If you are in a Liberal held riding, ask your Member of Parliament if there are any persons or businesses that he or she recommends be approached. Buy the Canada Phone CD-ROM and download the names and addresses of businesses.

A Master Fundraising Database

Where possible, get all your lists on disk. If not, put them on one master database for future use. You can use the database to print envelopes or labels. It will come in handy for the next election. If at all possible, use Microsoft Access for your database.

The fields should include surname, first name, address, city, postal code, home phone, work phone, past donations. Be creative here.

The Invitation

Get It Done Professionally

The invitation is the first thing that your ticket buyers will see, so you want it done right. Hire a professional to design it for you. Be imaginative but don't go overboard on printing costs.

Another matter to consider is whether people should send in their cheques by mail. Some organizers prefer to deliver the tickets in person and pick up the cheques on delivery. Whatever you do, if the buyers are expected to mail in their cheques, make sure you have a stamped self-addressed envelope and an order card that will fit in the envelope.

It would be advisable to include the tax credit available to buyers.

The Contents

Make sure you have the bases covered:

- date
- your riding association name
- time
- Master of Ceremonies (if well known)
- place (directions if necessary)
- your Member of Parliament's name (optional)
- speaker
- how tickets can be purchased
- dinner or reception
- the name of the evening (i.e. "An Evening with Jean Chrétien")
- price (regular and discount, if any, for members of your pre-authorized chequing program)
- tax credit available

Mailing It Out

Get a group together to stuff the envelopes and put the labels on them. Some people like to hand-write the addresses and a stamp for a personal look. Alternatively, see if a business will put them through their postal meter for you and bill you for the cost. If they have a machine that will seal the envelopes as well, all the better.

The mailing should be done about 6 weeks before the event – certainly 4 weeks at the very latest (that's really pushing it).

Make sure that the return address on the envelopes is a box or address you can access easily every day.

Selling The Tickets

The Key People

As mentioned earlier, the key person is the Chair. Although he or she will be making a number of calls, they cannot do it alone. You will need some other well-known Liberals to make some calls as well. You need a group of people who know the likely donors. You will sell a lot more tickets if your callers personally know the people they are calling – there will be a sense of obligation.

Get a group of five to ten people together and have them divide up the master list. Have them mark the people they feel they can call. Then set a deadline as to when the calls are to be done. Written instructions are important. The Chair should follow up with them constantly to see how they are doing. These calls should be completed two weeks before the event (you can give them some leeway if necessary).

This group should not be expected to call all the names. The rest of the names should be called by riding volunteers. The riding fundraising chair and the president should make the arrangements for these calls.

The General Phone Calls

The riding volunteers should be making their calls to the rest of the list starting three to four weeks before the event and going until the week before. They should be given a script and a form to fill out for any sales they make.

The calls should be made as a group from an office where there are at least five to six lines. Try to get a team of five to six people per evening from 6 p.m. to 8 or 9 p.m. Make sure the lists are clearly marked so that people are not called twice and so that subsequent calls can be made if someone was not home. There should be a captain there each night to supervise the calls. Try to make the calls from the same location and at the same time each night so that there will be no confusion.

Phone calls are an absolute must. If you don't call, they won't buy tickets!

Encourage your callers to:

- talk in a natural voice
- use their own words – the script can be a guideline
- do not want to speak as if they are reading off a piece of paper
- smile when they talk – it makes them sound much warmer.

Continue the phone calls right to the end. You can never sell too many tickets.

PAC Program Members

An event like this is a perfect opportunity to sell your pre-authorized chequing (PAC) program. Make sure there is a large discount for them and play up the discount in your invitation or brochure. You can even send along an application form with the invitation.

Mention your association's pre-authorized chequing program in your telephone script. You will be surprised how many average people will join.

Consider having a reception with your guest speaker before the event for members of your pre-authorized chequing program. This will show them the benefits of belonging to your program.

Distribution of Tickets

Once you have a commitment, there are two options: have them mail their cheques and then mail or deliver their tickets or deliver the tickets and pick up the cheques at the same time. The latter is probably the safest choice. If you wait for many people to send in their cheques, they may never get around to it.

You will need at least one (preferably two or three) person with time and a vehicle to deliver the tickets and pick up the cheques.

A question is often raised about giving tickets out to your sellers to carry around with them. The difficulty with this system is that it becomes too hard to track. Consider keeping the tickets with the chair or the person doing the tracking, and let them send out the tick-

ets upon payment. This allows for better tracking of sales and control of the tickets themselves.

Payment

Although most people pay by cheque, some will inquire about credit. Check with your local bank. Some will supply you with a credit card account and machine for a nominal price. Watch for the amount of the discount charged – it should be 2.5 – 4% and no more.

You may also get a couple of NSF cheques. Don't be afraid to go after them, even if they didn't show up – after all, you likely paid for their dinner.

Tracking

Meet Weekly

Your committee should meet weekly starting at least two months before the event. There would naturally be a number of meetings earlier than this to make the preliminary plans.

You should keep minutes of these meetings in order to make sure everyone knows their assignments for the coming week. They should be faxed out within a day or two.

Keeping Track

For each meeting, have a report ready on who has purchased tickets and the overall total sold. Each purchaser should be listed individually so that everyone can see and make comments. If a large company is expected to buy a table and only buys one ticket, you want to know it so that someone can make a call.

You should also have a report on who has refused to buy a ticket. Perhaps the wrong person made the call and a call from someone else might do the trick.

The Room and the Menu

Decorating the Room

You should be appointing one or two people to take charge of decorating the room and looking after the

physical arrangements.

The decorations could include:

- a podium (with or without light)
- crepe paper (red and white, naturally)
- a Liberal sign on the podium
- helium-filled balloons
- Liberal signs around the hall
- white table cloths with red napkins, or vice versa
- Canadian flags around the room
- a backdrop behind the speaker (especially if there is TV coverage), or else a row of flags
- flowers on the tables
- a centrepiece for the head table

It is surprising how much it takes to decorate a large hall. To make the decorations look prominent, it will take a lot of materials and a lot of time. You are better off not to decorate at all than to under-decorate.

The Menu

The menu must be one that will appeal to everyone. For instance, pork may cause some difficulty. Beef is a safe bet, as is poultry or pasta. You may also want to consider having available a vegetarian dish and be sensitive to the dietary requirements of some religious groups. While you want a good meal for your guests, you do not want to overdo it. Keep a tight control on the meal costs. Remember, you are in it to make money.

Event Day

Seating Arrangements

Once your sales are completed, you will need to set up the seating arrangements. You are better off deciding who sits where so as to avoid a rush for seats and to make sure that those who buy tables and other prominent Liberals are given good seats. Appoint someone who knows most of the guests to look after this. It cannot be done until the last couple of days. Make sure they do a professional-looking display at the entrance so that people can see where they are sitting.

The tables should be spread around the hall in such a way as to make it look as crowded as possible. Some

dinners have a printed program at the tables. You should consider whether it is worth the time and money.

The Head Table

Keep the head tables as small as possible without causing bruised egos. Certainly the Members of Parliament from the participating ridings should be there. Their spouses might also be there if there is room. Of course you will also need your master of ceremonies, your chair, your speaker and perhaps the riding president. About eight or ten people is the maximum.

The head table should, if possible, be elevated a bit (even a foot would do).

The Speaker

The Speaker will likely be picked up at the airport or some other location. Make sure that an appropriate person picks him or her up. Make hotel arrangements in advance if necessary. See if they need to freshen up or relax before going to the event.

Have a gift ready for presentation. The guest speaker may prefer that you make a donation to one of their favourite charities in their name rather than receiving a gift. Consult with the speaker or a member of their staff.

Check with your Member of Parliament, if applicable, and your speaker about going around the room to meet the guests. Some speakers will not eat dinner but instead go from table to table while people are eating. If they do this, someone should go with her or him to introduce them. Otherwise, see if they can meet people before or after the dinner. Again make sure someone is with them.

Arrangements should be made to take the speaker to wherever they are going after the event.

Physical Arrangements

A good sound system is an absolute must. See what is at the location and test it a week before. If it is not appropriate, rent one. Test everything again early in

the day of the event so that the sound system can be replaced or repaired, if need be.

Check the decorations to make sure they are appropriate.

Check the place settings, the flowers, etc. to make sure everything you ordered is there.

Make a Splash!

Don't be afraid to make a splash during the event. Here are some ideas:

- to bring in your guest speaker, have a spotlight ready, turn out the lights, and shine the spotlight as he or she comes in (appropriate for high profile speakers).
- pipe in the head table
- have a draw or an auction (silent or otherwise)
- have a theme for the night and decorate accordingly
- have some entertainment
- show a video on a large screen TV
- keep things brief and keep it moving – people will want to go home

Clean-Up

A clean-up crew should be ready afterwards to clean up and return everything.

The Aftermath

Thank You Letters

Thank you letters to ticket purchasers are a rarity after fundraisers. Consider doing that – you will be surprised at the reaction. People will remember it. Volunteers should also be thanked by letter. The chair should sign all such letters.

Pay the Bills

All bills should be collected and given to your accountant as quickly as possible to get them paid and to allow the accounting to be done right away

Get the Accounting Done

The riding president should follow up with the accountant to get the accounting done and sent in to the Provincial/Territorial Association or LPC, depending on the case. This is especially important if the event is in the fall or at Christmas. Remember that there are different people who review the accounting after it leaves the riding's hands and it all takes time. You want to get it done right and early.

You do not want to see the accounting sent in six months after the event, leaving everyone wondering where their tax receipts are. In particular, companies who have fiscal year ends during the calendar year get upset if the receipts are delayed.

Reviewing the Event

Have a post-mortem meeting after the event to review what went right and what went wrong and take detailed notes for next time.

Finally, make sure you update your master database to reflect who attended and how many tickets they bought. These are people you will want to approach in the future.

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