

# Campaign Skills Trainer's Guide

## Module 10

### Mobilizing Resources

### *Support, Donations, Volunteers*





# CAMPAIGN SKILLS TRAINER'S GUIDE

## MODULE 10: MOBILIZING RESOURCES

### Support, Donations, Volunteers

#### SESSION OVERVIEW:

All campaigns need resources, and successful candidates are able to mobilize many types of assistance, including donations, in-kind contributions, volunteers, and supporters. This module explores the skills and techniques involved in resource recruitment and management.

In this module, participants identify the types of resources needed to run a campaign--money, in-kind contributions, supporters and volunteers--and learn techniques for identifying and assessing potential sources of support. Special focus will be put on identifying potential supporters and fundraising techniques, and practicing how to directly ask for financial and other forms of support.

**NB:** In advance of the training, inform participants that they should bring along their personal contact or address books and any contact lists they have access to from their parties or campaigns. They will use these to build a list of potential donors.

#### SECTIONS:

1. Rules for Political Fundraising
2. The Spectrum of Support
3. Identifying Potential Donors
4. Fundraising Tools and Techniques
5. Resources vs. Return
6. The Art of the Ask

#### LEARNING OBJECTIVES:

- Identifying the types of resources needed
- Identifying and assessing potential sources of support
- Identifying different fundraising techniques
- Practicing how to ask for things in person

**TIME:** 110 minutes

#### MATERIALS:

- Flipchart and paper, markers and tape
- Paper and pens or pencils for participants (or advise them in advance to bring their own)
- Training agenda (optional – can be written on the flipchart)

#### HANDOUTS:

- None

#### PREPARATION:

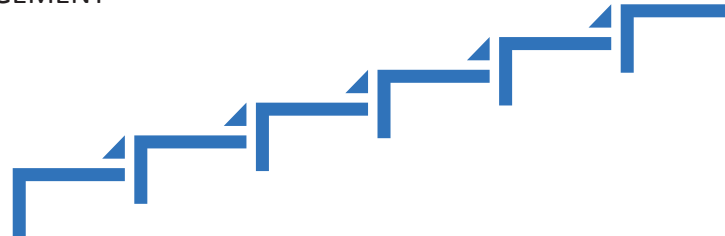
Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives

### 3. MYTHS OF POLITICAL FUNDRAISING:

- Only people with a lot of money donate to political parties.
- If I ask someone for money, I will make them angry.
- Fundraising is only about money.
- It doesn't matter what the law says; no one will ever find out.
- Fundraising is begging or shameful.
- We don't need to go out and find donors; they will find us!

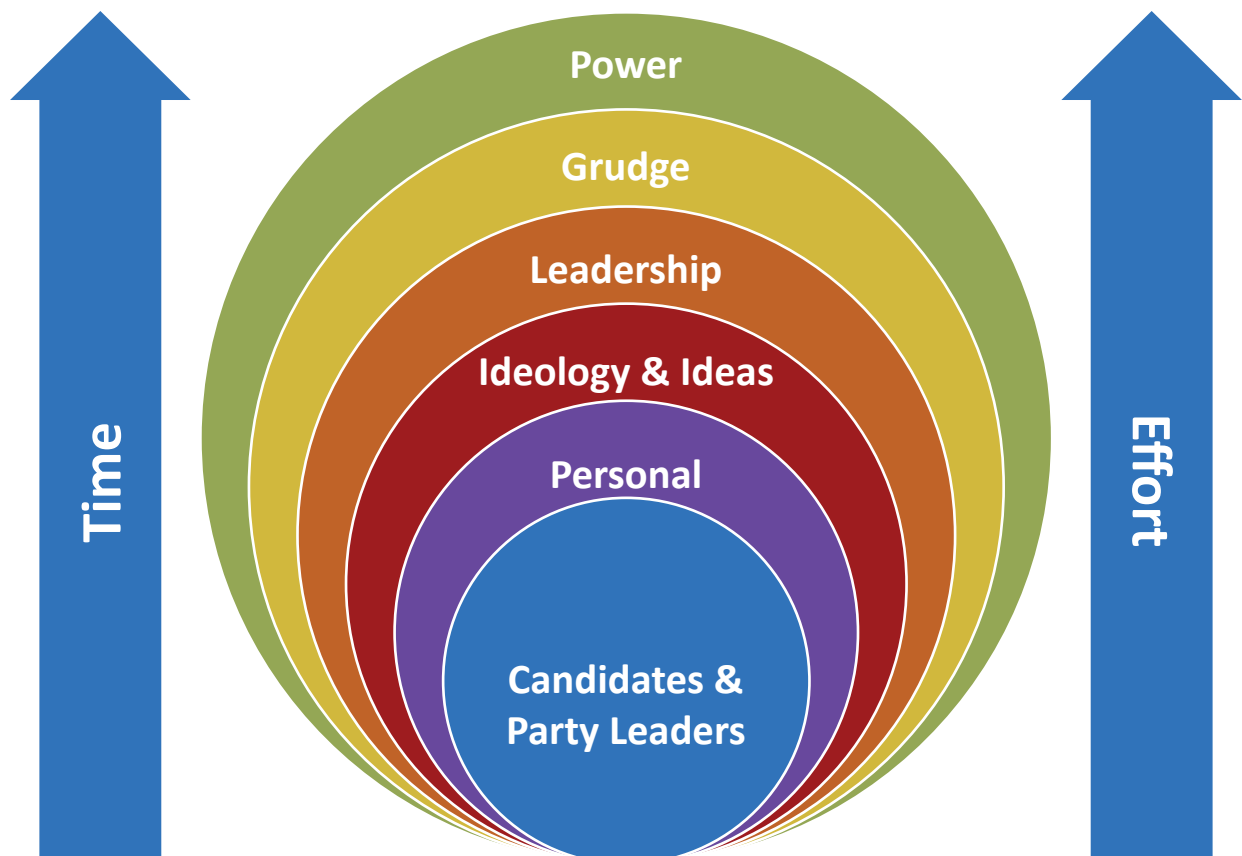
### 4. LADDER OF ENGAGEMENT



### 5. QUESTIONS FOR CANDIDATES AND PARTY OFFICIALS:

- Who knows you? Who likes you?
- What issues have you championed? Who else thinks these issues are important?
- What are your professional achievements that interest or impact others?
- What are your personal achievements that interest or impact others?
- Who are your political allies?
- What organizations do you belong to?
- What community leaders support your work?
- What family ties will help fundraising?

### 6. CIRCLES OF BENEFIT:



## 7. FUNDRAISING TECHNIQUES ASSESSEMENT:

High Resources / High Return	Low Resources / High Return
Low Resources / Low Return	High Resources / Low Return

## 8. THE ART OF THE ASK:

1. Prepare
2. Establish Rapport
3. Connect
4. Be Specific
5. Stop Talking
6. Listen and Respond

If the donor says:

Yes →

Maybe →

No →

Yes, but less →

7. Take Care of Details
8. Show Appreciation
9. Ask Again
10. Stay in touch

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

## TRAINING ACTIVITIES

### SECTION 1 – Rules for Political Fundraising – 10'


Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review the learning objectives.	TP	1	
2	<p>As a warm-up, begin the session by asking the participants if they have ever raised money or got any other resources donated for their party. Ask those who have to tell you what they have learned from that experience. (If no one has done this, ask participants what their impressions are of political fundraising.)</p> <p>Then say that there are several common misunderstandings about how political fundraising works and share with them the following list:</p> <ul style="list-style-type: none"> <li>• Only people with a lot of money donate to political parties.</li> <li>• If I ask someone for money, I will make them angry.</li> <li>• Fundraising is only about money.</li> <li>• It doesn't matter what the law says; no one will ever find out.</li> <li>• Fundraising is begging or shameful.</li> <li>• We don't need to go out and find donors; they will find us!</li> </ul> <p>Confront each of listed myths with truths, but before you reveal these, ask the participants if they can explain why each myth is not true. Try to elicit as much as possible from the following:</p> <p><u>Only people with a lot of money donate to political parties:</u></p> <ul style="list-style-type: none"> <li>• It is not just the wealthy who are willing to be political donors.</li> <li>• In many countries, the people who earn the least amount of money give the largest percentage of their income away.</li> <li>• It is possible to raise large sums of money in small amounts.</li> </ul>	DBR	9	<p>This brainstorming serves as an assessment tool. It is highly that most participants will have done some form of resource raising – getting food donated, recruiting volunteers, finding someone to pay for mobile phone cards, and other similar things – but they may not realize that what they did was resource raising or fundraising.</p> <p>If participants seem particularly uncomfortable with the idea of fundraising or asking for money, feel free to take a minute before the “Myths” exercise to explore this and ask them to explain why they feel this way. A number of the issues addressed in the “Myths” exercise may come out, which will create a useful segue.</p> <p>Prepare the following on the flipchart in advance:</p> <div> <p><u>Myths of political fundraising:</u></p> <ul style="list-style-type: none"> <li>• Only people with a lot of money donate to political parties.</li> <li>• If I ask someone for money, I will make them angry.</li> <li>• Fundraising is only about money.</li> <li>• It doesn't matter what the law says; no one will ever find out.</li> <li>• Fundraising is begging or shameful.</li> <li>• We don't need to go out and find donors; they will find us!</li> </ul> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p><u>If I ask someone for money, I will make them angry:</u></p> <p>Sometimes, we are concerned that we will insult someone if we ask them to contribute to our political party or campaign, or we think we will have to offer them something in return for their contribution. The truth is that when you are asking someone to contribute to your party, you are asking them to take leadership and to support your party's or campaign's vision for the country and the future. People are often honored to be asked to play such a role.</p> <p><u>Fundraising is only about money:</u></p> <ul style="list-style-type: none"> <li>• Money is important, but it's not everything.</li> </ul> <p>If a supporter is not able to give money, they might be able to provide office space, office supplies, computers, printing, air conditioning, internet access, transportation, bathroom supplies, food and refreshments, etc., or to host an event for the party or candidates.</p> <p><u>It doesn't matter what the law says; no one will ever find out:</u></p> <ul style="list-style-type: none"> <li>• Voters are skeptical about the relationship between money and politics and, frankly, they should be.</li> <li>• Everything that you do as a political fundraiser must be legal, moral and ethical.</li> <li>• Know the law: who can give, how much, when and what has to be publicly declared. If the law does not exist or is unclear, set your own standards, make them honorable and stick by them.</li> <li>• Always ask yourself: how would I feel if this appeared in the newspaper (or if my mother found out)?</li> </ul>			

Steps	Description	Type	Min	Note to the Trainer
	<p><u>Fundraising is begging or shameful:</u></p> <ul style="list-style-type: none"> <li>• Political fundraising is not begging and should not be considered shameful or embarrassing.</li> <li>• Political fundraising is a form of specialized marketing, connecting the vision of the party to individuals who want to see that vision become a reality.</li> <li>• Raising money for politics is about getting people involved in political events that affect all of society. Asking people to become more invested in their country's political future should be perceived as an honorable request rather than an embarrassing or awkward one.</li> </ul> <p><u>We don't need to go out and find donors; they will find us!</u></p> <ul style="list-style-type: none"> <li>• Money rarely finds its way to your campaign all by itself.</li> <li>• This type of specialized marketing requires research and outreach to identify and communicate directly with prospective donors.</li> <li>• The only way to raise money is to ask for it!</li> </ul>			

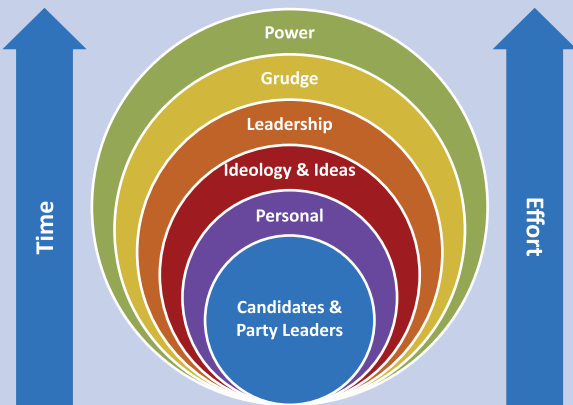
## SECTION 2 – The Spectrum of Support – 7'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Revisit the point you have just made that fundraising (and resource raising) is not just about money. Reaching out to supporters and potential supporters is about getting people involved in the political process. There are many ways that people can support your campaign.</p> <p>Ask the participants to think of all the different ways that supporters can engage with or get involved with their political party or campaign. Some of these may involve contributing money, but others may involve giving time or helping the party expand its support.</p> <p>Write participants' ideas on the flipchart, trying to elicit at least 5 but no more than 8 suggestions. Some options to help with the brainstorm are listed below. Ensure that there is diversity among the suggestions in terms of the level of commitment to the campaign they require, and that "making a financial contribution" is one of the items.</p> <ul style="list-style-type: none"> <li>- Attending an event</li> <li>- Talking to family and friends about the campaign</li> <li>- Helping at the campaign office</li> <li>- Canvassing</li> <li>- Hosting an event</li> <li>- Making a financial contribution</li> </ul> <p>Once you have completed the list, ask the participants to put these activities in order from lowest to highest, in terms of the level of engagement with the campaign or party they require. In other words, the activities at the bottom rungs of the ladder require less time and commitment from the supporter. As you move up the ladder, the level of commitment from the supporter increases.</p>	DBR	5	<p>As the participants are organizing steps, you can draw a blank Ladder of Engagement (the number of steps should match the number of activities listed in the brainstorming) to which you will add their conclusions:</p> <p><u>LADDER OF ENGAGEMENT:</u></p>  <p>The final ladder of engagement, completed with the participants' suggestions, might look something like the one below. The activities moving from the lower rungs to the higher rungs of the ladder should become more progressively involved, committed and engaged with the party or campaign.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask a participant to come up and facilitate the discussion among the larger group while you prepare the ladder of engagement on another piece of flipchart paper. Once they have reached consensus, add their answers to the picture, ensuring that the highest one is “making a financial contribution”.</p> <p>Conclude with:  <i>Building support can start with something that seems very small or simple – often it is simply attending an event for the party or the candidate – and then grows into something bigger. This is how many political party and campaign activists begin and expand their commitment to politics.</i></p>	TP	5	<p>If participants are unable to reach consensus during the discussion on the level of engagement and commitment among the activities, feel free to intervene to provide direction.</p> 
2	<p>Ask participants: <i>Why do people give support to political parties, campaigns and candidates? Why do people do things like the activities we have listed on the ladder of engagement?</i></p> <p>Accept all the reasons offered by the participants, and then explain that all of these can be summarized by the following two:</p> <ol style="list-style-type: none"> <li>1. People give support because they want to</li> <li>2. People give support because someone asked them to</li> </ol> <p>Make a strong point here that:  <i>The job of the campaign team is to identify people who support, or will vote for, the candidate or party—and then to move those people up the ladder of engagement, increasing their level of support and commitment so that the campaign has the volunteer, material and financial resources it needs and the supports have the opportunity to engage more fully in political life.</i></p>	DBR	2	<p>It is unlikely that participants will give the answer, “because someone asked them to” during this brainstorm, but this is an important point to make. Tie this back to the points you made during the “Myths of Fundraising” discussion about fundraising as a way of asking people to take leadership, and about how money never walks in the door on its own; you have to go out and ask for it.</p>

## SECTION 3 – Identifying Potential Donors – 41’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce this section by saying:</p> <p><i>Now that we clarified what fundraising and resource-raising are all about, it is time to think about who the people might be who we can ask for these things.</i></p> <p><i>Finding potential donors starts with identifying individuals and organizations with whom the party or its candidates have shared values, ideals, visions or attitudes. It is surprisingly easy to do this, and it all starts with brainstorming – amassing information by thinking through some of the questions and clues as to who donors might be.</i></p> <p><i>The best place to start is by interviewing the party’s candidates and senior officials, as they are likely to have the highest profiles and the strongest personal and professional networks, by asking them some of the following questions:</i></p> <ul style="list-style-type: none"> <li>• <b>Who knows you? Who likes you?</b></li> <li>• <b>What issues have you championed?</b></li> <li>• <b>Who else thinks these issues are important?</b></li> <li>• <b>What are your professional achievements that interest or impact others?</b></li> <li>• <b>What are your personal achievements that interest or impact others?</b></li> <li>• <b>Who are your political allies?</b></li> <li>• <b>What organizations do you belong to?</b></li> <li>• <b>What community leaders support your work?</b></li> <li>• <b>What family ties will help fundraising?</b></li> </ul>	DBR	5	<p>Prepare the following flipcharts in advance:</p> <div> <p><u>QUESTIONS FOR CANDIDATES AND PARTY OFFICIALS:</u></p> <ul style="list-style-type: none"> <li>• Who knows you? Who likes you?</li> <li>• What issues have you championed?</li> <li>• Who else thinks these issues are important?</li> <li>• What are your professional achievements that interest or impact others?</li> <li>• What are your personal achievements that interest or impact others?</li> <li>• Who are your political allies?</li> <li>• What organizations do you belong to?</li> <li>• What community leaders support your work?</li> <li>• What family ties will help fundraising?</li> </ul> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Another brainstorming tool is a diagram called the Circles of Benefit. This figure illustrates the six major categories of political donors. It can be used to help candidates, party officials and political fundraisers think about what types of people in their personal or professional network might be potential donors.</p> <p>Reveal the diagram you have written on the flipchart in advance and explain each category:</p> <p><b>Candidates and Party Leaders:</b></p> <ul style="list-style-type: none"> <li>• Candidates and party leaders should make a personal financial contribution to their campaign or party, respectively.</li> <li>• It is difficult to make the case that other people should give if they are not doing so themselves.</li> </ul> <p><b>Personal</b></p> <ul style="list-style-type: none"> <li>• Candidates and party leaders should look at their personal connections, including family members, friends, and close professional colleagues, to identify potential donors.</li> <li>• Because of their personal relationship with the party leader or candidate, these people want to see the candidate succeed.</li> <li>• Fundraising Message: "This is important to me."</li> </ul> <p><b>Ideology and Ideas</b></p> <ul style="list-style-type: none"> <li>• Donors in this category are those who share the same causes or who advocate for the same ideas as your party or candidates.</li> <li>• People who share the same heritage, background or community group may also fall into this category.</li> <li>• Fundraising Message: "We share the same values and vision."</li> </ul>			 <p>The diagram consists of six concentric circles. From the outermost to the innermost, the circles are labeled: Power (green), Grudge (yellow-green), Leadership (yellow), Ideology &amp; Ideas (orange), Personal (red), and Candidates &amp; Party Leaders (blue). To the left of the circles is a vertical blue arrow pointing upwards, labeled 'Time'. To the right of the circles is a vertical blue arrow pointing upwards, labeled 'Effort'.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p><b>Leadership</b></p> <ul style="list-style-type: none"> <li>Local community leaders, even those who are largely non-political, will often take a stand for you if they feel you will do a good job representing the needs of the community.</li> <li>Think about local leaders in the civic, academic, religious or business communities who may want to support good political leadership for the area as well.</li> <li>Fundraising Message: “We want the same things for this community.”</li> </ul> <p><b>Grudge</b></p> <ul style="list-style-type: none"> <li>Some donors may not like your party or your candidate very much. But, they dislike the party or the candidate that you are challenging even more and they want to ensure that you are in a position of strength to defeat your opponent.</li> <li>Fundraising Message: “We are strong; we can challenge them.”</li> </ul> <p><b>Power</b></p> <ul style="list-style-type: none"> <li>There are many donors who like to have a relationship with whoever is going to be in power, largely to protect their own interests.</li> <li>Connect their interests with the public commitments you are making as a campaign or party.</li> <li>People or organizations in this circle generally give late in an electoral campaign, because they want to see who is likely to win.</li> <li>Fundraising Message: “We are going to win and we understand your issues.”</li> </ul> <p><b>As the arrows on the side of the diagram illustrate, as you move from the core to the outside of the circle it takes more time and more effort to cultivate a relationship with each type of donor.</b></p>			

Steps	Description	Type	Min	Note to the Trainer
2	<p>Ask participants if they have any questions about the diagram or any of the categories of potential donors. Clarify any questions or misunderstanding.</p> <p>Instruct participants to take out a piece of paper and something to write with. Ask participants to review the categories of potential donors from the diagram and, thinking about their party or candidates, name at least one new potential donor for each of the categories. Allow 5 minutes for this exercise.</p> <p>When participants are finished, ask if anyone would like to share their list of potential donors. (NB: This is not essential, especially in a multi-party environment. However, in a single-party environment it can be a helpful way for participants to start thinking about who potential donors are.)</p>	ANK	7	<p>Debriefing exercises during a fundraising training can sometimes be tricky if participants feel that information pertaining to donors is sensitive or confidential. This tends to be in a multi-party setting in particular.</p> <p>However, don't avoid asking participants if they want to share their ideas about potential donors. What you may find is that this can lead to a very good discussion about who could possibly contribute to the party or campaign and, in some cases, the participants may end up working together to build a finance plan jointly.</p>
3	<p>Tell the participants that we are going to build on their initial ideas for donors and start thinking about how to expand this list.</p> <p>Explain to participants that finding potential donors often starts with doing exactly what they have just done – building a list.</p> <p>Where do the names on these lists come from? In reality, they can come from any source – any individual or organization that might be sympathetic to the party or the candidate. Common sources include:</p> <ul style="list-style-type: none"> <li>• <b>Current and past schedules, diaries or day planners</b></li> <li>• <b>Mobile phone contact lists</b></li> <li>• <b>Membership lists from professional organizations</b></li> <li>• <b>Employee or staff lists from work</b></li> <li>• <b>Rolodex or address books</b></li> <li>• <b>Club memberships</b></li> <li>• <b>Email lists</b></li> <li>• <b>Names of family members</b></li> </ul>	PEE + TP	7	<p>In advance of the training, inform participants that they should bring along their personal contact or address books and any contact lists they have access to from their parties or campaigns. These will be used in this segment of the training.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>These different types of lists can come from party candidates, senior officials, current party supporters, and other party activists. The purpose is to review these lists and identify anyone on them who might be a potential supporter.</p> <p>Ask participants if they can think of any other sources of contact information for potential donors.</p>			
4	<p>Ask the participants to take out the personal contact or address books and any contact lists they have brought with them. If they have not brought these things, ask them to open the contact lists on their mobile phones (or computers, if they brought one).</p> <p>Inform participants that their task is to identify 5-10 people on these lists who they think would consider making a contribution to their party or campaign, and add these to the list they have already come up with from the Circles of Benefit exercise.</p> <p>For each person they come up with, they should write down their:</p> <ul style="list-style-type: none"> <li>- Name and contact information (What's the best way to reach them? Phone? SMS? Email? At home? At the office?)</li> <li>- Their relationship to the party or candidate</li> </ul> <p>Allow 5 minutes for this activity. As with the previous exercise, feedback and debrief are optional depending on how sensitive this information is.</p> <p>When participants have completed this exercise, make the following point:</p> <p><i>Once you have a central list of potential donors, the next questions are:</i></p> <ul style="list-style-type: none"> <li>- <b>What (or how much)</b> should you ask each person to contribute?</li> <li>- <b>How is the best way to ask them?</b></li> </ul>	TP	3	

Steps	Description	Type	Min	Note to the Trainer
5	<p>Explain to participants that you will first look at how to figure out what or how much to ask potential donors to contribute.</p> <p><i>Donors typically fall into three general categories, based on the general amount you feel you can ask from them:</i></p> <p><b>Low donors</b>  <i>These are donors you can ask for a small amount of money or material resources.</i></p> <p><b>Medium donors</b>  <i>These are donors you can ask for a moderate amount of money or material resources.</i></p> <p><b>High donors</b>  <i>These are donors you can ask for a large amount of money or material resources.</i></p> <p><i>The amount of money you can ask for from each category of donors will depend on the local economic situation, what earnings are like and whether or not there is already a culture of political giving, which can take time to develop. Consider each of these factors and assign a specific figure to each category of donors, or a specific amount that you are going to ask each individual on your list to contribute.</i></p>	TP	4	
6	<p>Ask participants to go back to their list of potential donors and, by each one's name, indicate their likely level of giving. They can do this by either assigning a specific amount of money they think they are likely to give, or characterize each as low, medium or high.</p>	ANK	10	<p>If there is sufficient time, facilitate a discussion among participants of what range of money constitutes a low, medium and high donation. These may differ according to the perspective of the participants and their party, but it is helpful to define these.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Allow 7 minutes for this exercise and 3 minutes for the debrief. During the debrief, even if participants don't want to share names or the financial amounts they have assigned to each potential donor, ask them to report back how many low, medium and high donors appear on their list. It can also be helpful to ask them to specify a financial range for what constitutes a low, medium or high donation.</p> <p>After this exercise, advise participants that this is something they can do in their own political parties or campaigns:  <i>To build a larger list or even a database of potential donors, organize a brainstorming meeting or planning session with party leaders, senior officials, candidates and even prominent party supporters. Ask them all to come to the meeting with their personal and professional contact lists and any other relevant data files, and walk them through the same brainstorming process as you have conducted in this workshop.</i></p> <p>Advise participants that when putting together a database of potential donors, it is important to compile all of this information as clearly and comprehensively as possible. Get the spelling of names correct; identify the right way to address people and the best way to contact each person on the list.</p>			

## SECTION 4 – Fundraising Tools and Techniques – 15'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain that you will now look at how you actually go about asking donors to contribute. Define “Fundraising Tools and Techniques” by offering the following: <i>Fundraising tools and techniques are the activities, methods and means that political parties and candidates use to raise money or ask for other forms of support.</i></p> <p>Ask the participants to give you examples of fundraising techniques that they are aware of or which they may have used in the past. Write these on the flipchart.</p> <p>Add any from the list below which were not mentioned during the discussion, and briefly explain what they are:</p> <p><i>Common fundraising techniques include:</i></p> <p><b>Auctions</b> – At auctions, organizers get a number of nice items donated, such as pieces of art, clothing, dinner at a nice restaurant, hotel stays, etc., and invite potential donors to bid on these items at a reception or dinner.</p> <p><b>Raffles or tombola</b> – For a raffle or tombola, get items of any value donated to the party or campaign and sell tickets to as many people as possible. Draw tickets to determine who wins the prizes. This can be done as part of another event or as a stand-alone fundraiser.</p> <p><b>Membership dues and fees</b> – Collect fees from party members at regular intervals (e.g., monthly, quarterly, annually). Offer different levels of membership depending on income and ability to pay. If your party is going to charge membership fees, it must collect these on a regular basis.</p>	DBR + TP	10	<p>Since the concept of fundraising for political parties is fairly new in many countries, participants may be skeptical that some of these methods could work in their local environments. If this is the case, encourage participants to think more broadly and creatively and advise them that all of these methods can be modified to suit local norms.</p> <p>Clearly fundraising techniques which go against legal or cultural standards should be avoided. For example, don't organize a lottery if gambling is unacceptable or illegal. But there are simple ways to adapt each of these techniques to accommodate what will be more acceptable and appealing locally.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p><b>Grassroots fundraising</b> – Grassroots fundraising is when you raise large to moderate sums of money in small amounts. This can include selling campaign or party merchandise such as shirts, bags, posters and buttons; selling food at a community event; or organizing a coffee or tea gathering. The internet is now being actively used in many countries (where the necessary infrastructure exists) as a highly successful medium for grassroots fundraising.</p> <p><b>Coffees or house parties</b> – Coffees or house parties are informal events in which party members or supporters host small gatherings of their friends, family, neighbors and/or colleagues either at their home or another comfortable venue. The host uses the event to introduce a candidate or party to their guests.</p> <p><b>Potluck dinner or picnic</b> – At a potluck event, the campaign or candidate sells tickets to raise money and everyone attending brings a dish or something to eat so that the costs of the food are covered.</p> <p><b>Awards event</b> – Awards events are typically more expensive gatherings in which the party sells tickets or tables of tickets to high donors. The party uses the event to deliver an award or to acknowledge some member of the community whose work or values matches the party's vision.</p> <p><b>Concert or dance</b> – Concerts, dances or any form of social event can be fun ways to raise moderate amounts of money and reach out to new or young donors.</p> <p><b>Community festival</b> – Some political parties host community festivals to mark a special occasion or anniversary and make money by renting out booths or tables to businesses and organizations, selling food and merchandise, recruiting new members and perhaps including other forms of fundraising such as a raffle.</p>			

Steps	Description	Type	Min	Note to the Trainer
	<p><b>Personal solicitation</b> – Personal solicitation is simply asking someone for money in a face-to-face meeting.</p> <p><b>Re-solicitation</b> – Re-solicitation is asking someone who has given money to the party or to a candidate in the past to give again.</p> <p><b>Call time/Phones</b> – Many candidates and party leaders set aside a specific amount of time every week to make phone calls to prospective donors to ask for contributions. This time can also be used to build relationships with individuals who may contribute over time, but not at the first point of contact.</p> <p><b>Letters</b> – In countries with reliable postal and banking systems, candidates or parties can send out letters either requesting donations or inviting prospective donors to attend a fundraising event.</p> <p><b>Email and the Internet</b> – Email and the internet are being used more and more as a successful form of grassroots fundraising in countries where the necessary infrastructure exists to support online donations.</p> <p><b>Finance Committee</b> – Finance committees are made up of individuals who commit to both donating and raising a specific amount of money each year for the party or specific candidates. Committee members are typically well-connected or high-profile supporters who receive special recognition for their work.</p> <p><b>Conferences and Forums</b> – Many parties organize conferences or forums of speakers in which prominent party officials and supporters speak on issues of public interest. There can be a ticket price or registration fee for these events, and parties can add additional fundraising events onto the conference, such as a networking coffee, higher-priced dinner or a raffle.</p>			

Steps	Description	Type	Min	Note to the Trainer
	<b>Selling Advertisements</b> - Some parties sell ads on promotional items such as an annual calendar. The calendar, for example, gives the party the opportunity to sell at least 12 advertisements. Selling ads is a way of offering donors something tangible in return for their support.			
2	Ask the participants to go back to their lists of potential donors again, and to select the fundraising technique which would be the most suitable for each individual on their list. Give 3 minutes for this activity.	ANK	5	As an alternative exercise, you can ask the participants to select 2 or 3 fundraising techniques which they think could be implemented in their communities and have a brief discussion on how they would implemented.

## SECTION 5 – Resources vs. Return – 15'

Steps	Description	Type	Min	Note to the Trainer																					
1	<p>Remind participants that in a campaign or political environment, you will rarely have all the resources you need to do everything you want to do. <i>Even in fundraising, you have to think strategically about the amount of resources you will have to use to get the return (or the results) that you want and need.</i></p> <p>Instruct the participants to review the comprehensive list of fundraising techniques you made in the previous segment. Ask them, based on their own experience and opinions, which would require the most work (resources) and which would generate the most money (return). Lead a short discussion.</p>	DBR + TP	15	<p>Prepare the following on the flipchart in advance:</p> <table><tr><th>High Resources / High Return</th><th>Low Resources / High Return</th></tr><tr><td></td><td></td></tr><tr><th>Low Resources / Low Return</th><th>High Resources / Low Return</th></tr><tr><td></td><td></td></tr></table>	High Resources / High Return	Low Resources / High Return			Low Resources / Low Return	High Resources / Low Return															
	High Resources / High Return			Low Resources / High Return																					
Low Resources / Low Return	High Resources / Low Return																								
	<p>Introduce the Resources vs. Return chart and ask the participants to place all the listed techniques in one of the quadrants, based on the resources they will require to put together compared to what the party or campaign will gain in return. Facilitate this discussion using the completed Resources vs. Return chart in the Note to the Trainer column.</p> <p>Debrief the discussion by pointing out that: <i>Just because you <b>can</b> put on a massive concert with the greatest pop stars in the country and lots of flashy stage lights and a giant sound system does not mean you should.</i></p> <p><i>Fundraising is about exactly that – raising funds. If an event that you are planning is going to take a lot of work and probably not make a whole lot of money, should you actually do it?</i></p> <p><i>This is an important question. All good political fundraisers need to continually compare the resources that each fundraising effort requires (e.g., the time, people, money, etc.) to the return that it will generate (e.g., the actual money or net income coming to the party).</i></p>		<p>Completed Resources vs. Return chart</p> <table><tr><th>High Resources / High Return</th><th>Low Resources / High Return</th></tr><tr><td>Auction</td><td>Personal solicitation</td></tr><tr><td>Awards dinner</td><td>Re-solicitation</td></tr><tr><td>Membership: monthly direct fees or high dues</td><td>Hosted event (all costs covered by hosts)</td></tr><tr><td>Higher-priced events</td><td>Call time</td></tr><tr><td>Finance committee</td><td>Email and internet (situational)</td></tr><tr><th>Low Resources / Low Return</th><th>High Resources / Low Return</th></tr><tr><td>Coffees or House Parties</td><td>Potluck dinner</td></tr><tr><td>Letters</td><td>Concert or dance</td></tr><tr><td></td><td>Membership with small dues</td></tr><tr><td></td><td>Merchandise – shirts, bags, buttons, books, etc.</td></tr></table>	High Resources / High Return	Low Resources / High Return	Auction	Personal solicitation	Awards dinner	Re-solicitation	Membership: monthly direct fees or high dues	Hosted event (all costs covered by hosts)	Higher-priced events	Call time	Finance committee	Email and internet (situational)	Low Resources / Low Return	High Resources / Low Return	Coffees or House Parties	Potluck dinner	Letters	Concert or dance		Membership with small dues		Merchandise – shirts, bags, buttons, books, etc.
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## SECTION 6 – The Art of The Ask – 20’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the section and explain the process:</p> <p><i>Being able to ask for things is a negotiation skill. In politics, asking for support – whether it is financial, material or political – is an important proficiency to develop. Remember that engaging supporters can start with something very small, and then grow into larger commitments. Being able to ask a supporter to take that slight step up from voter to volunteer is just as important as being able to ask a major donor for large amounts of money.</i></p> <p><i>When it comes to asking for things, your specific approach will depend on the nature of your relationship with the person you are asking and the types of language and communication styles with which you are comfortable. However, the process generally requires the following steps:</i></p> <p><b>1. Prepare.</b> Know in advance how much you are going to ask and think through <b>why</b> this individual would be motivated to support the party or campaign. In order to explore where there might be personal connections with the candidate, gather as much information as possible on the person’s professional background and connections, family relationships, schooling, and interests. If you are asking for financial support, consider what ring of the fundraising diagram this person might be on.</p> <p><b>2. Establish Rapport.</b> Use language, gestures and an appropriate setting to make a connection so that both you and the person with whom you are meeting feel at ease. Make it clear from your body language and approach that this is a two-way communication; you are not just going to blurt out the request for money or other forms of support.</p>	TP	10	<p><u>THE ART OF THE ASK:</u></p> <ol style="list-style-type: none"> <li>1. Prepare</li> <li>2. Establish Rapport</li> <li>3. Connect</li> <li>4. Be Specific</li> <li>5. Stop Talking</li> <li>6. Listen and Respond</li> </ol> <p><u>If the donor says:</u></p> <p>Yes →</p> <p>Maybe →</p> <p>No →</p> <p>Yes, but less →</p> <ol style="list-style-type: none"> <li>7. Take Care of Details</li> <li>8. Show Appreciation</li> <li>9. Ask Again</li> <li>10. Stay in touch</li> </ol>

Steps	Description	Type	Min	Note to the Trainer										
	<p><b>3. Connect.</b> Clearly connect what is important to the donor with what you are trying to achieve as a party or a candidate, and explain how you can make a difference. Keep your message compelling but concise; do not talk for too long.</p> <p><b>4. Be Specific.</b> Ask for something specific. If you are asking for money, tell the potential donor exactly how much you would like them to contribute. It is not sufficient to ask for “something” or “anything.” This is a negotiation – you have to give them something to work with.</p> <p><b>5. Stop Talking.</b> Once you’ve asked for something specific, stop talking and wait for the supporter or donor to consider the request and listen for the response. Do not worry if there is a moment or two of silence; that is perfectly normal. If you try to fill the silence with words, you may find you are talking yourself down from what you have just asked for and undermining your own ask. If it is difficult to be quiet, reach for your glass of water or tea and take a long sip!</p> <p><b>6. Listen and Respond.</b> There are four potential answers from the donor or supporter and four potential replies from you.</p> <table><tr><td><u>If the donor says:</u></td><td><u>You say:</u></td></tr><tr><td>Yes →</td><td>Great! Thank you!</td></tr><tr><td>Maybe →</td><td>Do you need more information?</td></tr><tr><td>No →</td><td>Is there another amount you would be comfortable giving? Or, is there another way of supporting the party that you would feel more comfortable with?</td></tr><tr><td>Yes, but less →</td><td>Would a contribution of (slightly lower figure) be more appropriate?</td></tr></table>	<u>If the donor says:</u>	<u>You say:</u>	Yes →	Great! Thank you!	Maybe →	Do you need more information?	No →	Is there another amount you would be comfortable giving? Or, is there another way of supporting the party that you would feel more comfortable with?	Yes, but less →	Would a contribution of (slightly lower figure) be more appropriate?			
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Steps	Description	Type	Min	Note to the Trainer
	<p><b>7. Take Care of Details.</b> If the person has made a financial commitment, make arrangements to collect it including where and when. If they need to consider the proposal further, determine how you will get them the information they need and make a date for a follow-up meeting. If the supporter has agreed to get more involved in the campaign, make arrangements for when and how this can happen.</p> <p><b>8. Show Appreciation.</b> Regardless of the response, make sure you thank them for their time and consideration. Be sure to send a formal and appropriate thank you to all supporters, no matter what they have contributed.</p> <p><b>9. Ask Again.</b> Once you have shown appreciation for your donors, do not be afraid to ask them for an additional contribution. Donors who have already invested are highly likely to contribute again. If a supporter has agreed to volunteer at campaign headquarters or to canvass, ask if they would be interested in getting more involved by hosting an event for the campaign for example.</p> <p><b>10. Stay in touch.</b> Keep good relations with donors, potential donors and supporters who are making a real contribution to the campaign. Do not call only when you want to ask for something, but also during special occasions, holidays or to communicate about significant political events or happenings within the political party.</p>			

Steps	Description	Type	Min	Note to the Trainer
2	<p>Ask for two volunteers to come up to the front and give them the role of either a candidate (who is asking for a contribution) or a potential donor.</p> <p>The participant who is the potential donor takes on the character of one of the people he or she has listed in the exercise done in section 3 and tells the group a bit about this person, including their relationship with the candidate.</p> <p>The participant who is the candidate can take a minute or two to prepare, including thinking about what or how much to ask for, and can ask for details or any other information they need.</p> <p>Give them a 2 minute limit and a scenario (are they meeting in a café, an office, an event, for example). Then, they play out their roles with the candidate asking for a contribution.</p> <p>Offer feedback, both from the trainer and the group, and give the participants the opportunity to comment on how it felt to ask for money, and how it felt to be asked.</p> <p>Repeat the same role play with one or two more pairs, based on time available.</p>	ANK	10	

## CONCLUSION – 2'

Fundraising is an important, long-term strategic function for all political parties and campaigns. It requires time, skills, planning, commitment and an understanding of the process.

What is most important to keep in mind is that fundraising is a way of asking supporter to take leadership; that it is not only about money but about finding ways for supporters to become more engaged in the political process; and, that at its core, fundraising is simply another means for parties to reach out to and connect with voters.