



— ONE VOICE UNITED



IN DISTRICT FUNDRAISER TOOLKIT

INTRODUCTION

One of the most effective ways to cement a good relationship with a lawmaker or potential lawmaker is to participate in their election or re-election effort. Candidates take opportunities to meet voters and raise funds for their campaign very seriously. On average, a House congressional race costs upwards of \$1.5 million and a Senate campaign can cost over \$10 million. Inviting a candidate into your home or your office to meet your friends, colleagues and family is more than just a fundraising opportunity; it provides you a forum to develop a personal relationship with the candidate.

1. DECIDE ON A CANDIDATE



- **Choose a candidate who is supportive of oral health care and dentistry.**

If the candidate is an incumbent, he/she will have a legislative record. Call or email ADPAC to check on the candidate's record.

- **Understand the political landscape and layout of your congressional district.**

Most congressional races consist of an incumbent (someone who is currently a member of Congress) and challengers (someone who wants to become a member of Congress). ADPAC does not generally support challengers unless the incumbent candidate has been a foe to dentistry or oral health. Incumbents have a very high success rate and ADPAC believes that making enemies in Congress is not effective. Occasionally, congressional races have an open race (when an incumbent retires). ADPAC does get involved in open seats upon request from the local dentists. Understanding political positions of candidates is essential when choosing a candidate to financially support.

2. PLANNING THE FUNDRAISER



- **Choose the location for your fundraiser.**

The fundraiser can be held at your home, your dental office, or at any reasonable location.

- **Set a fundraising goal for a House candidate between \$5,000 and \$15,000 and a Senate candidate between \$15,000 and \$20,000.**

A small, private event such as a dinner or reception will allow the candidate to spend quality time with you and your colleagues. In order to hit your fundraising goal with such a small number of attendees, tickets could cost \$250 or you could also host a larger event like a barbecue in your backyard where tickets can be \$50.

- **Contact the candidate at their campaign office.**

Call or email the campaign and ask to talk to the manager or finance director. Explain what dates you and your venue are available and work out a time that works best for both you and the candidate. With the help of the campaign, set a fundraising goal and ensure that the candidate's schedule will not change at the last minute. Confirm the date (in writing) with both the campaign and ADPAC.

- **Consult with ADPAC and your state dental society from the beginning.**

A variety of factors should be considered when hosting a fundraiser. ADPAC and the candidate's campaign will help you through the process. Timely communication is vital to hosting a successful event.

- **Budget everything first and minimize costs.**

An in-district fundraiser doesn't need to be elaborate or fancy, but there will be costs incurred. Decide what food or beverages you will be having and if a caterer is needed. Make sure to stay within the legal guidelines when hosting a fundraiser; there is a maximum amount of money you are allowed to spend providing invitations, food, and drinks for a fundraiser of \$1,000 per person (\$2,000 per couple) per election. Anything above this limit is considered by the FEC as an in-kind donation and counts against your maximum contribution. To help ensure that you are in compliance please make sure to keep all receipts and turn over copies to the campaign.

3. RECRUIT A HOST COMMITTEE

- **Determine and recruit individuals to serve on the host committee.**

Having a host committee will help you reach beyond your own contacts. They can help create an invite list, and assist in the overall promotion of the event. Each steering committee member should personally recruit money and attendees.

- **Recognize the host committee on the invitation.**

The host committee can be made up of your fellow colleagues, other health care professionals or friends that live in the candidate's district.

4. CREATE AN INVITATION

- **Draft an invitation and check the spelling of all names.**

Create a simple invitation and an accompanying email to include with the invitation. You may want to send personalized emails to certain groups of attendees. One email can go to your dentist invitees while another can go to your friends and family.

Example of a Personal Letter or Email to an Invitee:

Dear (Name):

As you may know, (candidate's name) is seeking (re-election/election) to be our U.S. Representative. As a strong advocate of issues important to both our profession and our community, I believe that (candidate's name) is uniquely qualified to represent our district. You are cordially invited to attend a (reception/dinner/other) in (candidate's name) honor at my home on (date) and (time). This will be a great opportunity for you to meet and speak with (candidate's name) and to demonstrate the (profession's/community's) support for (his/her) work in Congress. Please RSVP and let me know if you can join us on (date). I look forward to seeing you.

Sincerely,
(Your name)

4. CREATE AN INVITATION *(CONTINUED)*

• Include RSVP information.

It is essential to have your attendees RSVP. Include information for invitees who wish to contribute but cannot attend. You may want to include a credit card slip for contributions. Work with the campaign to ensure that you have all the information needed, i.e. card number, CSV, expiration.

Example of a Reply Card:

- Yes, I will attend the (event) in honor of (candidate). Enclosed is my check for (ticket price)
- Yes, I will attend the (event) in honor of (candidate) and will bring my contribution of (ticket price) at that time.
- I am unable to attend the (event) in honor of (candidate), but want to show my support. Enclosed please find my contribution of \$_____.

Name: _____

Address: _____

Occupation: _____

Please make check payable to:
(Campaign Name)

Example of Formal Invitation:

Dr. and Mrs. Tom Jones Mr. Tom Saul
Ms. Natalie Halpers Mr. Tim Frost
Dr. and Mrs. Disaronno Dr. Sarah Mill

Invite you to a Home Fundraiser for

Congressman Mike Peterson

Thursday April 17, 2013
6:00 p.m. to 8:00 p.m.

At the home of John Smith, DDS
Middletown, NJ

Please RSVP by April 13, at jsmithdds@dds.com
Please see reverse side for directions

5. COMPILE AN INVITATION LIST



- **Use your state organization, the campaign and ADPAC as resources to compile lists of invitees:**

- List of dentists and spouses in the district/community;
- Lists of physicians/others in the medical community;
- Targeted lists from the campaign; and
- Neighbors, friends, and family.

- **Try to contact guests through two different mediums when sending invites.**

Because addresses change frequently, it is best to contact your invitees twice. You can extend an invite through an email, Facebook event, telephone call or regular mail.

6. FOLLOW UP WITH INVITEES



- **Make one final phone call to invitees who have yet to respond with two weeks left.**

Calling the invitees who have yet to respond will truly make your event successful. Use a prepared script and solicit help from your steering committee.

Sample Script for Fundraising Calls:

I'm calling to follow up on an invitation that was sent to you to attend a (event) in (candidate's) honor. The (event) will take place at the home of (host's name) on (date) at (time). (Candidate's name) will be there, and you'll have a chance to meet and talk to (him/her.) We'd also like to ask that you show your support for (candidate's name) campaign with a contribution of \$ _____.

If the person remembers receiving the invitation and still has it:

Do you think you will be able to join us on (date)?

If yes: Great! I will make sure that your name is placed on the attendees list and I am sure (candidate's name) will look forward to seeing you there. You may mail your contribution in the envelope enclosed with your invitation today, or bring it with you to the event.

If no: I am sorry that you won't be able to attend, but hope you'll still want to show your support for (candidate's name) by sending a contribution. This is a great opportunity for the dentists in our community to make a real impact with (candidate's name) and your contribution will help to make this event a real success.

7. UNDERSTAND LEGAL CONSIDERATIONS



- **Be aware of certain provisions in the federal election law if you hold a fundraiser on behalf of a candidate for federal office.**

Staff at ADPAC will work with you to be sure that you are in compliance. You and your spouse are permitted to spend up to \$2,000 as a couple (\$1,000 each) on the cost of invitations, food and beverages, without it being counted as a campaign contribution.

- **Recognize that you may make these expenditures in any single election, which means that you may host a fundraiser on behalf of a federal candidate during the primary, a run-off election (if one occurs) and again for the general election.**

These expenditures do not count against the individual contribution limit of \$2,700 per candidate, per election, which you are also permitted to make.

- **Collect contributions at your fundraiser by personal check or money order and give them directly to campaign staff (if present) or transmit to the campaign within 10 days of the event.**

Federal law requires that the name and address of the contributor and date of receipt for each contribution exceeding \$50 be forwarded to the candidate's campaign committee within 10 days of receipt. If you receive individual contributions in excess of \$200, federal law requires that the contributor provide his/her name, address, occupation, name of employer and the date of receipt so that the information can be forwarded to the candidate's campaign committee within 10 days of receipt.

- **Understand that legal requirements for state candidate fundraisers vary by state.**

Your state and local dental societies will assist you in compliance with state campaign finance laws.

- **Take out liability insurance.**

Anytime you host an event at your house, you should call your homeowners insurance carrier and ask for a one night liability insurance policy. Explain the event and how many people should be attending. Sometimes, your typical homeowners insurance will include adequate coverage.

***This is not legal advice.** These are considerations that you should understand before hosting a fundraiser. For further information on federal campaign contribution limits, visit the [Federal Election Committee's Citizens' Guide](#).



8. COMPLETE THIS CHECKLIST



- Contact ADPAC.**
- Set realistic expectations and goals.**
- Finalize the budget for the event and set an attendance estimate.**
- Create a steering committee with members from the dental and physician community.**
- Send out invitations to guest list and keep track of responses.**

FOUR WEEKS FROM FUNDRAISER

- Follow up with ADPAC to request a contribution to present to the candidate at the event.**
- Work with the campaign to set a schedule for the event, including who will speak to attendees.**
- Decide on what food and beverages you will be serving, contact a caterer if needed.**

THREE WEEKS FROM FUNDRAISER

- Check in with the steering committee to evaluate the status of attendance and money raised.**
- Create a plan of action to meet fundraising goals and give steering committee members final assignments.**

TWO WEEKS FROM FUNDRAISER

- Make calls to all of those invited who have not responded to invitations.**
- Recruit any volunteers for day/evening of the event.**

ONE WEEK FROM FUNDRAISER

- Follow up with ADPAC to ensure that the contribution has been sent directly to you for presentation to the candidate at the event.**
- Call caterer with final headcount, if necessary.**
- Make calls to all of those invited who have not responded to invitations.**

DAY OF FUNDRAISER

- Send all checks to the candidate's treasurer within 10 days.**
- Follow up with a thank-you note to the campaign and express continuing support for his/her candidacy.**
- Send thank-you letters to all attendees and volunteers.**
- Save all necessary information — it will help when hosting a future event.**
- Report back to ADPAC and your state society.**

Your efforts in organizing this fundraiser will help ensure that the voice of dentistry is heard clearly in the U.S. Congress. We thank you for your time and efforts on behalf of dentistry.

ADPAC WEBSITE (ADA.ORG/ADPAC) INCLUDES:

- Names, emails and phone numbers for your local ADPAC board member.
- Sign up for the action alert e-list, so you will be able to receive emails from ADPAC when urgent action is needed.
- A list of our legislative accomplishments.
- A breakdown of federal and state legislative and regulatory issues.
- Tools to look up your member of Congress and his or her staff.
- Other toolkits which include information on being an Action Team Leader and successfully meeting with members of Congress in Washington, DC.

ADPAC STAFF CAN ASSIST WITH:

- Hosting a home-district fundraiser.
- Locating politically involved dentists in your district.
- Hosting advocacy training events and presentations.
- Scheduling Congressional tours or events.

ADPAC STAFF

Peter Aiello, Grassroots Manager
202.789.5168 or aiello@ada.org

Sarah Milligan, Director
202.789.5171 or milligans@ada.org

ADPAC Main phone: 202.898.2424

