Annotated Agenda

**Planning A Grassroots Fundraising Event**

**TIME ALLOTTED: 90 minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT
* Planning a Grassroots Fundraising Event: A Guide
* Planning a Grassroots Fundraising Event: Breakout Exercises

**GOALS FOR THIS SECTION:**

* Participants understand the key components that make up a successful grassroots fundraising event
* Participants walk away with ideas on integrating action events with grassroots fundraising
* Participants feel confident in creating and running their own grassroots fundraising event utilizing tools and resources provided

**SKELETAL AGENDA**

1. **Introduction and Goals**
2. **Grassroots Fundraising Basics**
3. **Before Your Fundraiser**
4. **During Your Fundraiser**
5. **After Your Fundraiser**
6. **Debrief, Next Steps and Closing**

**ANNOTATED AGENDA**

**0:00-0:05 Introduction and Goals**

0:00-0:02 Personal Story Introduction

* **[Slide 1]** [Trainer should give a two-minute version of their personal story as relevant to this module. Don’t forget to share challenge - choice - outcome and practice it like any other section! It’s especially important with this module that those three elements of your story are clearly identifiable and that your story is no longer than two minutes.]

0:02-0:05 Goals and Agenda

* **[Slide 2]** We have three goals for this session:
  + First is that you understand the key components that make a successful grassroots fundraising event;
  + Second is that you walk away with ideas on integrating action events with grassroots fundraising;
  + And third is that you feel confident creating and running your own grassroots fundraising event, using the tools we provide to you.
* And to achieve our goals, here’s a look at the agenda:
  + **[Slide 3]** We’re about to wrap up the introduction and goals.
  + Then, we’ll discuss the basics of grassroots fundraising;
  + We’ll dive into all the steps we take before, during and after any strong fundraiser, with some interactive exercises to go with each phase;
  + Then we’ll debrief and wrap up!
  + **[Animation cue]** With that, let’s jump into the basics of grassroots fundraising!

**0:05-0:20 Grassroots Fundraising Basics**

0:05-0:12 What it is and why we do it

* **[Slide 4]** OFA has only previously raised money through HQ. Now, in addition to raising money to support the grassroots through HQ, OFA Volunteers in each state are able to fundraise. The exciting part is that anything they raise in state, stays in state and goes toward the work they’re doing to advance issues specifically for that state.
* Note: To ensure that each state gets credit for dollars raised by Volunteers in their respective state, people must donate to their state specific grassroots fundraising link (or a specialized event link) so they can track donations. More on how to donate in a few slides later.
* **[Slide 5]** Why do we grassroots fundraise? [First, pose this question to the crowd. A follow-up question could be, what are the opportunities from allowing each state to fundraise directly for their own states? Take 3-4 answers.]
* [Then walk through the benefits of fundraising in state, acknowledging anything already mentioned]
  + **[Animation cue]** Create self-sustaining organizations: Volunteers can raise funds to keep the organization running in state to carry out tactics around issue campaigns
  + **[Animation cue]** Provide resources for day to day organizing: There is benefit to raising funds in state that can help direct resources to activity in your state
  + **[Animation cue]** Provide more opportunities for Volunteers to take action: Volunteers make not be able to give time, just money. Also, Volunteers can now give time by both fundraising and training others to fundraise.
* **[Animation cue]** And finally, it allows more supporters to take ownership of movement. By ensuring that all funds raised in state, stay in state, we have more control over resources we can apply toward our organizing work in state.

0:12-0:18 What is a GRF House Party?

* **[Slide 6]** There are a lot of different tactics for fundraising in state. For the majority of this training, we’re going to focus on the core tactic of house parties to grassroots fundraise. Here, we will break down the Grassroots Fundraising House Party answering the 5 W’s of What, Who When, Where, and Why.
* **[Animation cue]** What: A Grassroots Fundraising House Party is a planned gathering of your personal network to both raise funds in state for OFA and move our agenda forward by taking action on one or more of our issue campaigns. It has a fundraising goal and a purpose to reach that goal that attendees are aware of.
* **[Animation cue]** Who: You should start with your personal network of friends, family, neighbors, and co-workers. If you need more people to invite, you can pull a list from VAN in MyCampaign or reach out to who you directly work with at OFA to help with that list.
* **[Animation cue]** Where: Contrary to the term “house party” many folks do not have it in their home. You can have the event anywhere but here are a few suggestions. In public locations such as a library, restaurant (back or party room), community center, or park. In private locations, you can have it at your or someone else’s home, or an office to name a few.
* NOTE: You should try having the event in a place that has internet access so you can accept donations directly and fill out the fundraising link as soon as someone donates
* **[Slide 7]** You should plan for an event 10-14 days out. Less than 10 days is not enough time to plan and invite guests but more than 14 days will not allow us to hit goals in a timely manner.
* **[Animation cue]** And finally, in terms of why we do it:
  + One, it’s the most reliable way to raise money in state and you can grow the community among the attendees to continue working towards change.
  + In addition, it’s a great opportunity to grow the organization by bringing in new volunteers who want to donate.
  + Finally, it’s another opportunity for folks to come in as donors and leave as volunteers just through taking action at your event!
* **[Slide 8]** So now we are going to take a look at a success story!
* Nancy and Silvia are teachers in Miami who are passionate about the issue of Comprehensive Immigration Reform. Both of their parents were immigrants to the US, and many of their friends, neighbors and co-workers had a personal stake in seeing reform to our immigration policy.
* Although Nancy and Silvia had volunteered during the election, most of their network had not been involved in any political action before.
* Silvia and Nancy decided to host a house party where they could tell their network about the work OFA was doing in support of comprehensive immigration reform and ask them to get involved as donors or volunteers. They each invited 20 people they knew to come to the house party to hear about OFA and comprehensive immigration reform.
* At the house party, Nancy and Silvia presented information about OFA’s mission and strategy for promoting comprehensive immigration reform. Afterwards, they made a fundraising ask of $10 - $50 from each of their guests.
* **[Animation cue]** Some guests gave a little, some gave more, and their event resulted in raising $1300 from 29 guests!

0:18-0:20 Where We Stand in Our State

* **[Slide 9]** So before we jump into all the steps that go into making an event like this successful, I want to talk about where we stand in our state.
  + [In this section, you will want to break down and insert your goals (at the state or chapter level where applicable) to connect the work we’re doing to specific goals and the need to be metrics driven to hit them.]
  + [Total raised YTD: How much has the organization raised since March 1st, 2013 (state or chapter level)]
  + [Goal: What is your total goal for the year (state or chapter)]
  + [Total left to raise: Subtract Goal from Total Raised]
  + [Events Needed This Month to Reach Goal]
* **[Slide 10]** So now that we understand the basics of grassroots fundraising, why we do it, what a fundraising house party looks like, and what we’re working toward in our states, we’re going to dive into the first phase - before the fundraiser!

**0:20-0:45 Before Your Fundraiser**

0:20-0:25 If you were throwing a party, what would you do to prep?

* **[Slide 11]** Before we get into the pre-fundraiser checklist, I want to open it up for discussion. With a show of hands, how many of you have ever hosted a party? Great. So what are the steps we take to prepare for a party we’re throwing? [Lead a popcorn discussion for about 4 minutes. This is modeled to help draw the correlation that a lot of throwing a grassroots fundraising house party is very similar to things that they have already done not just with OFA but in life in general.

0:25-0:30 Pre-Fundraiser Checklist

* **[Slide 12]** Okay, so before any grassroots fundraiser, there are eight steps of preparation. You’ll dive into these in more detail in your breakouts, but for now, this is the summary.
* All of this information, along with a lot more detail, is also in the handout you received, called “Running a Grassroots Fundraising Event: A Guide to everything you need to do before, during and after.” Feel free follow along on your own.
  + First is to set a location and date. Once you have your date and you know where your event will be held, you can work backwards from there. You should give yourself 10-14 days to pull your event together - that is the sweet spot.
  + Second is to set goals. Now, there are really three metrics you want to set, and they're all interrelated:
    - How much money do we want to raise total?
    - How much will we ask each attendee to contribute?
    - And how many attendees do we want to show up?
  + The next step is to get a grassroots fundraising event link. You’ll work with your state coordinator to get essentially a webpage just for your event, where people can donate to help you reach your goal.
  + Fourth is to decide an action theme. Every fundraiser should have an action component that helps advance one of our issue campaigns. Decide what activity your event will do, such as writing letters to the editor or calling members of congress around an issue, and include it as a part of your ask to attendees for your event. We’ll talk about this more when we discuss the event agenda in the next section.
  + Fifth is to enter your event on BarackObama.com, so you can recruit attendees online and by email.
  + Sixth is to create an attendee list. Who are the groups of people you might think of as you brainstorm people to invite? [Ask people to share, popcorn style, and make sure that the following are mentioned:
    - Friends
    - Relatives
    - People who volunteer with you at OFA
    - Co-workers
    - People you know from church
    - People you know who are particularly passionate about one of our issue campaigns, but may not be involved yet]
* Alright, so once we’ve made our list, our seventh step is to actually invite people. Two major things on this:
  + First is that everyone should be invited with a personal phone call. Email is a great way to reach a lot of people, but not a great way to get a commitment from someone. So if you have their phone number, make sure they get both a call and an email with the fundraising link; if you don’t, feel free to invite them by email, but I wouldn’t necessarily count on those folks as very likely to actually show.
  + Second is that we should invite twice as many people as we think will show up. This is just the rate we have learned from the past.
* And finally, our eighth pre-fundraiser step is to confirm attendance, making sure we remind people 2 days out and 1 day out with both a phone call and an email.

0:30-0:40 Breakouts

* **[Animation cue]** Alright, so that is enough of me talking at you!
* What we’re going to do next is break out into groups of three, but please don’t move until I say go.
* Everyone should have a packet that says “Breakout Exercises” at the top.
* With your team, you are going to actually go through the steps of planning a grassroots fundraiser, and you’re going to start by tackling some of these pre-fundraiser steps.
* [Give participants instructions on how to break out. It’s up to you whether they breakout with people they know, people they don’t know, or simply people who are sitting near them.]
* Alright, you’ll have about 8 minutes to decide some of these key details about your event, and then we’ll come back together and debrief!
* Ready - GO!
* [Give participants 8 minutes to discuss in their breakouts. Circulate the room and give time signals when there are 5, 2, and 1 minute remaining. Then, regain attention back at the front of the room.]

0:40-0:45 Full Group Debrief

* Alright, so how did that go?
* [Lead a discussion encouraging groups to share what they came up with in their breakouts. Below is a menu of questions you might use:
  + Who would like to share their event location?
  + Who thinks they might have the most unique location? Why did you choose?
  + Who would like to share their total raised goal?
  + Raise your hand if yours was higher than that amount.
  + Who would like to share their attendance goal? Raise your hand if yours was higher than that amount.
  + Who would like to share their action theme? Why did you choose that?
  + Who had a pretty good brainstorm going about the people they would invite? Would you like to share?]
* Great work, everyone! We are off to a great start.
* **[Slide 13]** So now that we’ve done all the work on the front end - we’ve set goals, we’ve planned out the logistics, we’ve invited our guests - we’re going to dive into what the event actually
* looks like while it’s happening.
* Once again, this information is all in your Guide under “During the Event,” and you can follow along on your own if you like.

**0:45-1:05 During Your Fundraiser**

0:45-0:50 Review Basic Agenda

* **[Slide 14]** This is a look at a standard agenda for a grassroots fundraising house party.
* The first thing is sign-in, which is a crucial piece to actually collecting donations.
  + As people arrive, a great practice is to have a few volunteers staffing a table with a few computers up where people can actually contribute to your grassroots fundraising page as they arrive.
  + You should also make sure you capture contact info for everyone, so that you can follow-up with them later.
* Once sign-in is done, you’re ready to start your actual program. I recommend setting the arrival time about a half hour before the program start time, and allowing people to mix and mingle in between the two.
* In the introductions and welcome, the host should do two things:
  + First is to introduce himself or herself
  + Second is to announce the goal for funds raised for this event. This will make people feel motivated to give, to give more, or even to give again, if they know it will push the event over the top!
* After the Welcome, the next step is to give everyone a quick update on what action has been taken around issue campaigns in the community and what are upcoming events where attendees can take action. This is an opportunity to inform guests of how their donations will be put to good use.
* Next is to celebrate the goal. The host will announce the money that has been raised so far. They will have a volunteer who has been keeping track of donations during the sign in process. A good best practice is to use a makeshift thermometer to show where the goal for the event is and where you stand. If you have already hit the goal, ask everyone to pitch in 1 more dollar to reach another benchmark. If you haven’t hit your benchmark, show what you have left to raise and ask everyone at the event to help you reach your goal. Tally any remaining pledges and celebrate hitting your goal.
* After that, it’s time to take action! This helps connect donors to the grassroots work that will win these issue campaigns. It’s the perfect example of killing 2 birds with one stone. The activity should be timed to fill up the rest of the event and should be no longer than 1 hour. Good examples are letters to the editor, call congress, or a short training.
* After the action component, you will want to give attendees an opportunity to hear how to get involved with more detail. The announcement of next steps can come form the host or another volunteer and should be planned ahead of time for what you want attendees to take action on after the event. It is also important to ask folks to make a public commitment to take action after the house party and ensure you have someone focused on signing people up directly for the next event. A good next steps best practice is having the future action events on a large piece of paper and directing folks to sign up after it is announced.
* And once you’re done with that, you’re ready to close! In five minutes, the host should bring everything to a close, thank attendees, and tie in how the money raised at the event will help us continue taking action on our issue campaigns. Also, don’t forget to collect any remaining contribution forms or have folks donate using the online link before they leave.

0:50-1:00 Breakouts

* **[Animation cue]** Alright so what we’re going to do is break out into the same groups as before, and flesh out an agenda for the event you’re planning together.
* There is a space for this on your packet of breakout exercises.
* Each agenda section title is on the page, and it will be your job to flesh out the details of the agenda together.
* You might want to appoint a note taker for this one, since there will be a lot of discussion and a lot to write down!
* Ready - go!
* [Give participants 8 minutes to discuss in their breakouts. Circulate the room and give time signals when there are 5, 2, and 1 minute remaining. Then, regain attention back at the front of the room.]

1:00-1:05 Full Group Debrief

* Alright, how did that go?
* [Lead a discussion encouraging groups to share what they came up with in their breakouts. Below is a menu of questions you might use:
  + Who would like to share what they put down for their OFA update?
  + Did anyone have some good creative for how we can celebrate the goal? We talked earlier about the thermometer so that people could visually see progress to goal. Any other ideas?
  + Who would like to share what the action component was?
  + Who had good ideas for closing up the event in a way that ensured people publicly committed to taking future action?]
* Alright, this is awesome! Fantastic work, everyone!
* **[Slide 15]** So we’ve done all the prep work, and we’ve completed a successful event. But the work doesn’t stop there, so let’s look at the steps we need to take after the event is over.

**1:05-1:15 After Your Fundraiser**

1:05-1:07 Post-Fundraiser Checklist

* **[Slide 16]** So it’s easy to remember everything you need to do after a grassroots fundraiser - because there are only three of them: report, thank, and follow-up.
  + Report: Make sure to report in the link provided in your host guide after your event so we can hear how you did and help to track your donations. The online link will direct you to report the total raised and pledged, as well as total attendees. It will also ask you for qualitative feedback on how the event went.
  + Thank: remember to reach out and thank all attendees and donors within 2 days of your event. They will be more likely to donate again!
  + Follow Up:
    - Remember to follow up with anyone that pledged and hasn’t donated yet within 2 days of your event.
    - You should also stay in touch with all of your attendees - once they’ve given, they’re going to be invested in your program, so give them some occasional updates on how the issue campaigns are going and keep inviting them to your events.

1:07-1:12 Breakouts

* **[Animation cue]** Alright, so we’re going to go back into our breakout groups for the last time.
* Please don’t move until I say go.
* You’re going to discuss two questions on the second page of your Breakout Exercises under “After the Event.”
  + The first question has to do with how you’ll actually keep track of these metrics so that you can report on the same day your event happens.
  + The second question has to do with how you’ll keep your attendees involved after the event is over!
* We’ll take just five minutes for this discussion, and then we’ll come back together and debrief.
* Ready - GO!
* [Give participants 5 minutes to discuss in their breakouts. Circulate the room and give time signals when there are 2 minutes and 1 minute remaining. Then, regain attention back at the front of the room.]

1:12-1:15 Full Group Debrief

* Fantastic, how did that go?
* [Lead a debrief discussion encouraging participants to share what they discussed. Here is a menu of questions you might use (you shouldn’t use all of them - these are just different ways of asking so that you can keep the conversation alive just in case groups are not vocal):
  + Who would like to share their ideas for keeping track of those metrics in real time?
  + Did anyone have a different idea?
  + What were some ways people came up with for keeping their attendees engaged?
  + Did anyone have a different idea?]
* These are all great! Nice job, folks!
* **[Slide 17]** So this brings us to the end of our exercises! Let’s go ahead and debrief, then take some questions, and wrap up!

**1:15-1:30 Debrief, Next Steps and Closing**

1:15-1:20 Debrief Discussion and Key Takeaways

* **[Slide 18]** Alright, so now that we’ve been through the basics of grassroots fundraising and gotten our hands dirty with the before, during and after of a strong event, let’s talk through some things.
* Who can tell me why we are fundraising in our state? [Call on 1-2 people to share.]
* How can we integrate the issue campaigns with fundraising? [Call on 1-2 people to share.]
* What are our fundraising goals? [Call on 1-2 people to share, and if they struggle, remind them of the goals stated on Slide 9.]
* **[Slide 19]** Alright, so there are three main things I hope everyone walks away with today.
  + First, is that grassroots fundraising is what allows us to create something sustainable here in our state. It allows us to take the organization into our own hands, and ensure we have the resources we need to win our issue campaigns and build a network that can take on the issue campaigns of tomorrow.
  + Secondly, anyone can run an excellent event, as long as we apply a little creativity and organization before, during, and after the event.
  + And finally, if we just follow these steps as we plan our next event, we’ll be able to reach our fundraising goal in our state.

1:20-1:25 Next Steps

* **[Slide 20]** [What next steps do you want participants to take to put these skills to action? Use this section to make a clear ask for a specific commitment.]
* **[Slide 21]** Alright, now I’d love to hear from you. What is the first new thing you’ll do to help our state reach its fundraising goals so we can advance our issue campaigns? Anybody want to share? [Call on 3-4 people to share their next steps.]

1:25-1:30 Q & A and Closing

* **[Slide 22]** Alright, let’s go ahead and take some questions!
* We might not get to all of them, but we’ll answer as many as we can. If we don’t get to yours, you can always follow up with your OFA point of contact or ask your question in the evaluation at the end of the day.
* [Spend 5 minutes answering as many questions as possible.]
* Thank you so much!