FINANCE PLAN OUTLINE

I. Candidate analysis
    A. Who knows your candidate?
        1. Previous donors
        2. Past schedule/calendar
        3. Holiday card list
        4. Professional achievements
        5. Rolodex/Outlook
        6. Club memberships
    B. Who likes your candidate?
    C. Who dislikes your candidate?
    D. What issues has she championed? (personally or professionally)
    E. What legislation has she sponsored?
    F. Who are her political allies?
    G. What organizations does she belong to?
    H. What family ties will hurt or help fundraising?

II. Campaign analysis
    A. Type of race: incumbent, open seat or challenger
    B. What is your candidate's perceived viability?
    C. Primary or general: how many and what type of opponents
    D. Legal Limits
    E. Assumptions about candidate's activities

III. Donor groups

    A. Make a list of donors or groups of donors targeted for solicitation
    B. What circle of benefit does each donor or group of donors fall in?
    C. What message will you use with each donor or groups of donors?
    D. What tools best fit this group?
    E. How much will you raise from each group?
    F. Who will solicit them?

IV. Projecting income

    A. Figure out the total number of prospects per donor group (N)

B. Figure out what tool you will use to solicit each member of the donor group (candidate call or visit, event, internet, direct mail, resolicitation, etc.)
C. Multiply the number of prospects by the assumed response rate for each tool (N x .60 for call time, etc.=R)
D. Estimate what the average contribution will be for tool (A)
E. Multiply the estimated response rate, R, by the estimated average contribution, A, to equal the projected income for each donor group (RxA=I)

V. Campaign calendar

A. How much call time will you need per week, per month or per quarter? BLOCK THIS TIME.
B. Create an event schedule
C. Create a schedule for direct mail creation and drops
D. The fundraising schedule should revolve around finance report deadlines
E. All tool activities should take into account the assumptions about cash flow

VI. Donor research

A. Who are the largest employers in the district/state?
B. Read local newspapers and business journals
C. Look at the political landscape
D. Look at the demographics of the district: ethnic, social, cultural, religious