

How to Put Together a Successful Fundraising Event

Prior to the event

- Identify Legislator/Elected Official/Candidate for whom you would like to do an event.
- Establish a goal of how much money you want to raise.
- Make contact with official's/candidate's fundraiser to identify dates that Legislator is available for event. CPTA government affairs staff and CPTA's contract lobbyist can assist in making this contact.
- **Identify a physical therapist that would be willing to host the event in his or her home, or place of business.** Preferably, the event is located in the Legislator's district, but just outside of the area or the general vicinity is often acceptable, as well.

The host has a variety of responsibilities. First, he/she should have the location prepared for the event, including any necessary food and beverages. (These can either be part of the host's donation to the event or the host can submit receipts to CPTA for reimbursement. Reception costs must be kept at or below \$500 to avoid reporting.) Secondly, the host needs to take ownership of the event and commit to heavily publicizing the event, along with getting people to attend. Third, the host needs to make personal follow-up calls to contacts to get people to attend. Often this requires multiple contacts for each person. CPTA can assist with this but it is also the host's responsibility. Fourth, the host is responsible for introducing the legislator around at the event, and introducing him/her before the Legislator speaks at the event.

- **Set date and time for event** – Typically, a weekday evening event is best, such as from 5:30 – 7:30 p.m. or from 6-8 p.m. (Adjust accordingly for traffic and other factors.) Another alternative is a weekend brunch or wine and cheese event. Unless the Legislature is not in session, events in the District will need to be scheduled on the weekend (as early as Thursday evening depending on the location of the district).
- **Create a flier** that identifies the subject of the event, the date, time, place, cost, and the ID number and address where checks should be sent. A form must be filled out that states the name, address, occupation, and employer of anyone that contributes \$100 or more to a Legislator. (See attached sample event flier.)

One month or more prior to the event

- **Send out invitations** to Physical Therapists in the area, family friends, other health care providers, and community leaders. CPTA can assist in sending out the invitations directly, or providing you with a universe of PT constituents that may be interested in the event. The broader the universe of your invitees, the better.

- **Establish an RSVP deadline date** and put directly on the flier. Make this at least a few days or a week prior to when you actually need a head count. For example, if your event is on March 1, set your RSVP deadline for February 20. This gives you a 3-5 day cushion of when you actually need a head count.

Two weeks prior to the event

- Send out reminders to targeted universe. Encourage people to make a contribution even if they are unable to attend. The more personal the request—calling someone on the phone rather than an email that they can ignore---the better. PEOPLE TYPICALLY NEED LOTS OF REMINDERS ABOUT THE EVENT.
- The host should secure a copy of the Legislator's/Official's/Candidate's biography so that he/she can familiarize themselves with the legislator and introduce them at the event. You can request this from the Lobbyist, or go to www.assembly.ca.gov or www.senate.ca.gov, locate the legislator's webpage, and find the biography.

One week prior to the event

- Make more follow up calls, send reminder emails, and ask people to attend the event. Again, if someone is unable to attend, ask them to make a donation anyway. Remind people about the event – including people who have RSVPed. Ask them to bring a colleague or someone who may not be a CPTA member.
- **Check in with the Legislator's fundraiser.** Put together background information to give to the fundraiser about CPTA, physical therapy in general, basic information on who will be attending the event, and issues that are of concern to Physical Therapists. This will enable the Legislator to make remarks that are relevant and of concern to PTs at the event. (See attached sample memo.)
- **Find out if the Legislator has any time constraints that evening** (I.E., if the event is from 6-8 pm but the Legislator can only be there from 6-7 pm, this is important to know.) You can encourage guests to get there early so that they can meet the legislator. This will also help the host with the timing of the program the day of the event.

Day of the Event

- Have name tags and pens available for guests. This will allow the Legislator to learn people's names more easily and for guests to mix and mingle who may not know each other.
- Have a sign in sheet of people who have rsvp'd for the event and check people off as they show up for the event. Write down the amount of everyone's contribution and forward along this information to the PAC committee.

- Have extra copies of the contribution form available for people to fill out if they are making a donation of \$100 or more. (This also applies if this particular contribution is one of a series to the legislator/official/candidate, and it is the one that pushes the contributor's total for the year to \$100 or more.)
- The host should make sure that the Legislator is introduced to all the guests. About halfway through the event, the host should gather the guests together, briefly introduce the Legislator, and ask him/her to say a few words. It is also a good idea for the guests to introduce themselves, where they work, and how long they have been practicing Physical Therapy. After the Legislator has addressed the group, guest should feel free to ask questions. After this, guests can mix and mingle some more, or this would be an opportunity for guests to leave.
- Before the Legislator leaves, the host can give the Legislator the checks that are collected at the event. If staff is present, he/she may or may not want to handle the contributions. Checks can also be mailed to the fundraiser's address. The host should keep an accurate count of who contributed and how much and forward the information to CPTA.

General Things to Keep in Mind

- Ideally, you want to have at least 20-30 people at a fundraiser (although this varies depending on the size of the venue. More is even better. Legislators often ask how many people are attending the event and we want this number to sound impressive.)

If you are unable to get 10 people to attend, you may need to consider postponing the event and picking a better date, or changing the event. For example, if the event can't be moved and no one can attend, the host could meet the legislator for coffee and deliver a check. This is a judgment call that will need to be made a few days before the event.

- **DO NOT DISCUSS SPECIFIC LEGISLATION AT A FUNDRAISER.** It is okay to discuss general concerns such as the current requirement that patients must receive a referral from a doctor prior to receiving physical therapy services, but never mention legislation by bill number. **NEVER ASK A LEGISLATOR OR STAFF MEMBER AT A FUNDRAISING EVENT DIRECTLY TO SUPPORT OR OPPOSE LEGISLATION.** Mixing legislative business and campaigning is illegal and should be kept separate.
- It is a great idea for guests to mention at an event that you would like to **schedule a follow up visit with a Legislator in their District or Capitol office** to discuss an issue. But again, do not directly ask for a Legislators support or opposition of legislation at a fundraiser. It is against the law. One of the primary purposes of the events is to establish a relationship with the legislator, so follow up visits are strongly encouraged.

- Please Note: Lobbyists may not contribute to the candidate and it is better if the lobbyist not become directly involved in the arrangements, although there is no prohibition of it.