



COLORADO RENEWABLE ENERGY INITIATIVE

FUNDRAISING HANDBOOK

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FUNDRAISING INFORMATION HANDBOOK

INTRODUCTION

Coloradans for Clean Energy (“CCE”) has embarked on a campaign to win passage of the “Colorado Renewable Energy Initiative,” which will appear on the November ballot. The campaign has established a budget of \$3.7 million. We welcome your participation as a member of our fundraising team in helping us reach that goal.

The success of our fundraising program is dependent upon your personal contribution and your willingness to ask for contributions from your family, friends, neighbors, colleagues, business associates and others.

Our fundraising program is based on a proven and successful model. The program is well organized and requires a team approach between Coloradans For Clean Energy, you and others working with us in this important effort.

The fundraising program is simple – it provides an opportunity for you and others to participate in a structured and measured program that asks people for specific contributions in a given period of time.

Your role as a member of the CCE Finance Committee is to help raise money for the campaign. Whether you join a Fundraising Committee and work independently to identify and solicit prospective donors, hold house parties and coffees, or assist with a phonebank, CCE will work with you every step of the way.

The following materials provide information about the fundraising program – its various components, tips on how to ask for money, and information on where checks can be sent. Other information will be provided as it is developed or situations warrant.

WELCOME TO THE TEAM

Your participation in our fundraising effort is crucial to the success of the campaign. We need to raise \$3.7 million to effectively get our message out to targeted voters. We will not be able to do that without your help and support.

We know that asking for money is never easy, nor enjoyable for most people. Despite this, we appreciate your willingness to join the effort. We will do what we can to ensure that the process is as painless as possible for you.

CCE's fund raising success begins with your monetary contribution to the campaign. It continues with your asking family, friends, neighbors, colleagues, business associates and others to do the same. Working within a familiar circle initially will help you develop an effective approach that can be used in other less familiar settings.

We hope the information that follows is helpful to your fundraising efforts. Should you need additional assistance or information, please call Stephanie Bonin at (303) 573-5121.

GOING IT ALONE OR BUILDING A TEAM

We realize that we are asking you to make a significant commitment of time and money, but we would not ask you for so much if both the need and opportunity were not so great. While some people prefer to work on their own, others may feel more comfortable raising money as part of a small team.

Whether you proceed on your own or create a team is your decision, and likely affected by prior family and professional obligations. However you decide to proceed, we will do whatever we can to support your efforts.

If you elect to build a Fundraising Team, you can recruit from your circle of friends, family, neighbors and business colleagues. You can recruit by profession, geography, community group, or in any way that makes sense for you.

Whether or not you proceed alone or as part of a Fundraising Team, the tasks remain the same -- you will need to develop a list of prospective donors and then solicit those prospective donors.

Studies show that the most successful fundraising occurs when people talk to people they know -- whether by phone or face-to-face. Letters help, but there is nothing like talking to people so that you can overcome any objections they may have and negotiate to "close the sale" right then and there.

Our fundraising program, and its overall success, is based on people like you taking the time to talk to others. We look forward to the results of your hard work and stand ready to assist in any way possible.

ASSIGNMENTS, GOALS AND DEADLINES

As in all matters, if we do not operate with assignments, goals and deadlines, time slips by, most often with a negative effect on results. Before you know it, you've lost the opportunity that set you on that course in the first place.

Just as assignments are created and goals and deadlines are set in business, with your children, and in other walks of life, so too must we set them in fundraising. Having specific fundraising goals, targets and deadlines for completion gives you or your Fundraising Team targeted responsibilities, accountability and an opportunity to measure progress.

With the election rapidly approaching, CCE has its deadlines and goals, and will work with you to establish yours.

COMPILING A TARGET LIST

Your first step is to compile a list of people you know and believe should contribute, if for no other reason than the fact that you are asking them. The next step is to determine both the importance of your relationship and any leverage that relationship may provide. Following that, using whatever knowledge of their position on renewable energy and the environment you might have, as well as your knowledge of their financial and/or family situation, determine and assign a contribution target amount.

The best people from whom to raise money are family, friends, neighbors, colleagues and business associates. The people closest to you will likely be the most helpful in your fundraising efforts.

When compiling and assigning contribution targets to your prospective donor list, we suggest you not make any decisions or judgments about how much a prospective donor can contribute. Mark down the amount you think they should contribute based on your relationship with them and their relationship to the issue, and then let them decide whether or not that is an amount they can comfortably contribute. If they don't give you what you ask for, you can negotiate.

In addition to your own lists, ask existing contributors if they would be willing to fundraise from their own list of family, friends, neighbors and colleagues. If you sense any uncertainty from them or if they need help, let us know and we'll help. .

The end result of these processes should be ready-to-call lists of prospective donors with contribution targets. A specific deadline date for completion of these initial calls should be set.

SETTING THE AGENDA AND RAISING EXPECTATIONS

Once you have developed your target list(s), you should give each person a contribution target. In so doing, you should avoid the temptation to say such things as, "well they're having a tough time right now," or, "they won't give that much," or "they can't afford that much," or a range of other excuses.

It is not our place to make decisions for people about how much they will or will not contribute. It is our place to communicate our goals, the campaigns' needs and your expectations – and then let them respond with their decision. If their decision is to contribute less than what you are asking, you can then negotiate with them.

Successful fundraising requires setting the agenda and goals for people – getting them to respond to our needs, not the other way around. When they have a personal or financial stake in the outcome, then clearly the goal set for them should be higher.

Ultimately, of course, the most important component of this process is your willingness to ask, and in the course of that asking, leverage your relationship with the prospective donor.

With respect to getting comfortable telling people what your expectations of them are, it's important to remember that people will never contribute more than you ask for. And, while they may never contribute what you ask, they will likely give more than they would have had a lesser amount been initially requested.

ASKING FOR MONEY

Be specific and set the agenda. Tell your prospect what you want and let them respond to you. If you put yourself in the position of having to respond to their offer of help, then the solicitation will not be as successful as it could be since you lose much of the opportunity to negotiate.

While it is easy to negotiate down from your initial request, it is extremely difficult to negotiate a higher amount from your prospect. If you are successful in setting the agenda, you may not get what you ask for, but you will likely get more than you would have, had you not asked for so much in the first place. Remember, set the agenda and let them respond to you.

Finally, remember, \$1,000 today is better than \$10,000 two months from now. Get what you can today...we can always ask for more later.

HOW MUCH SHOULD SOMEONE GIVE?

This is always a difficult question to answer. The short answer is “as much as possible.” However, the best answer is most often achieved by considering: a) how active the prospect is in other community or political activities; b) if they are an “educated” giver; c) your knowledge of their financial status; d) what their business stands to gain if the initiative passes; or d) what their business stands to lose if the initiative fails to win voter approval.

Knowing the financial situation of a prospective donor is important, but it is also important to stop yourself from making decisions and judgments about how much that person might contribute. Our responsibility is to provide them an “opportunity” to participate in a campaign that accomplishes something they support. The level of importance the campaign has for them should determine how much you ask them for.

Whatever contribution target you assign a prospect, that contribution will come as a result of you putting aside your fears and asking for a contribution outside your comfort level. Your success as a fundraiser will come as a result of your willingness to push prospective donors toward higher dollar amounts – and then negotiate with them to find a level higher than what they offer or are initially comfortable with.

At the end of the day, the fundraising experience should be a “win-win” situation. No matter how large or small a contribution someone makes, that person deserves our thanks and gratitude.

GETTING THE CHECK

Ask all donors to make their checks payable to “Coloradans For Clean Energy” and to mail them to Coloradans For Clean Energy, 1536 Wynkoop Street, Suite B-100, Denver, Colorado 80202.

If a prospective donor tells you that getting the check will take time, involves an “approval process,” that their spouse or boss must be consulted, ask them how long the process will take and confirm with them the amount of money they are going to request.

This information will allow you to know when to follow-up, who else you may need to follow-up with, and ensure that both you and the prospective donor agree on the contribution amount.

ASKING FOR MORE -- THE TWO TIER SOLICITATION

Successful fundraising is not just about “getting the check.” It is also about asking the donor, once they have made a commitment, to raise money for the campaign.

Essentially, we are asking people to “give and get” contributions. Whether they elect to call or write their friends or host a house party, their willingness to help raise money for the campaign is vital to our success.

FUNDRAISING OVERVIEW

- Fundraising for political campaigns is normally a chaotic process. Fundraising plans, Fundraising Teams, goals and deadlines bring order, structure and accountability to that process.
- Fundraising success depends on our collective abilities to implement an orderly program, which provides people with specific responsibilities to ask certain people for specific contributions in a given period of time.
- A successful fund raising program requires cooperation and a team approach between volunteers and campaign staff.
- Fundraising success is, in large part, the result of hard work by volunteers identifying, rating and prioritizing potential donors -- as well as accepting responsibility to solicit those potential donors.
- CCE will provide pledge and contribution reports, training and other necessary information to help you and all volunteers work efficiently and productively.
- The most successful fund raising will occur when you personally solicit family, friends, colleagues, associates and others with whom you have relationships and/or are in a position of leverage. Personal solicitations are most effective in a face-to-face setting. Telephone calls and conference calls are good too.
- Fundraising is not only a matter of "giving OR getting," it s a matter of "giving AND getting." Fundraising is an inclusive effort – the more participants the better.
- Each solicitation should have two tiers – the first tier is obtaining a contribution and the second tier is obtaining a commitment to raise money.
- Given what is at stake, we must be organized and act rapidly. The opposition will do whatever it takes to prevent passage of the Colorado Renewable Energy initiative. It is up to each and every one of us to do all we can to ensure we have the money to get out our message and win in November.

KEY FUNDRAISING POINTS

- Fund raising is a negotiation.
- You never get more than you ask for.
- It's better to get \$1,000 early than \$5,000 late (we can always ask for more later).
- Don't close a call without a contribution, even if it's \$10 or \$5.
- The question is not whether someone can afford to be involved, it's really a question of "Can they afford not to be involved?"
- Talk with a smile in your voice.
- Use humor whenever you can.
- Don't be afraid to ask and close.
- Set the agenda...tell prospects what you want from them. Let them respond to what you want, not what they want to give.
- When you do ask for the contribution, stay silent. Let them respond first. Though it might be uncomfortable, there is no need to speak. Once they respond you can, if necessary, begin to negotiate. If you talk first, all you do is negotiate against yourself.
- Don't make qualifying comments like "...or whatever you can afford." The prospects will have their own excuses about why they can't contribute, you don't need to open the door for them.
- Give prospects a specific target number.
- Always confirm the amount of the pledge and when the check will be mailed.
- We need commitments today so we can budget and spend accordingly.
- If prospects need to consult with a partner, boss or spouse, determine when that conversation will take place and the contribution amount that will be discussed. Tell them you will call them back within a few days of the time they are scheduled to speak with their spouse, boss or partner.
- Close the sale.
- No matter what the outcome, thank everyone for their time.
- Be more afraid of not having enough money to get our message out than you are of asking for money.
- Remind the prospect that you are volunteering your time. Stress the urgency of why you are making the call, that deadlines are looming that we are in danger of missing them.
- Remember, this is not a 15-minute social call. This is a solicitation. Ask, educate and then close as fast as possible.

SAMPLE SCRIPT

MAKING THE CALL

This is a sample script only and is primarily designed to be used as a guide and is not meant to be read verbatim. This script is designed to provide an example of how a solicitation might occur.

Many people are uncomfortable asking for money. The only way to get comfortable with soliciting contributions is to actually ask people for money, a process that will get easier as your experience grows. We hope this sample script helps.

IF THE PROSPECT IS NOT IN

If the prospect you are calling is someone you don't know and is unavailable, ask if the person who answered is their spouse – and, if so, solicit them. If not, tell them you will call back later.

If the person answering the phone asks: “What is this regarding?” Tell them: “the campaign to win passage of the Colorado Renewable Energy initiative.”

If the person answering the phone asks if you are calling to ask for money, say yes and immediately start the solicitation.

THE SOLICITATION

Mr. or Ms.(Name of prospect), hi this is _____. I'm a volunteer with Coloradans For Clean Energy, the group sponsoring Proposition xx, the Colorado Renewable Energy initiative, which will appear on the November ballot.

I'm calling today to ask you for a contribution to help us get our message out and win passage of this important initiative.

If we are successful in winning passage of the Renewable Energy initiative, then we will reduce our dependence on dirty fuels like coal and require the utilities to provide at least 10% of their electricity through renewable clean resources such as wind and solar.

As one would expect, the utility companies don't want voters like us to have any opportunity to directly influence the mandates under which they operate. They've been able to stop us three times in the Legislature, but now, with your help, we can pass Proposition xx and force them to expand their use of renewable, clean energy resources.

The utilities and coal industry have promised to spend millions to maintain control over energy policy and defeat us. It is imperative we have the funds necessary to get our message out and combat our opponents. Can we count on you for a contribution of \$ _____

(Depending on their answer, you will now likely begin the process of answering questions, overcoming objections and negotiating their contribution.)

GENERAL SOLICITATION NOTES

It is important to be up-front and tell the prospect why you are calling. There is no reason to hide the purpose of your call only to reveal it after your pitch. Everybody has received solicitation calls so this approach serves no purpose.

Ask for more than you think you will get – even an amount that might be considered “burdensome.” This allows room to negotiate and can give the prospect the sense that they are getting a “reasonable deal” after your “unreasonable” initial request. Also, make your request clean, avoid using qualifiers such as “...or whatever you can do.” Prospective donors will find their own excuses to give less, you do not need to provide any “easy outs.”

After asking for a specific contribution, be silent and allow for a response. The silence that follows your ask can be uncomfortable, but know that it is just as uncomfortable for the prospective donor as it is for you. If you say something first, you are more likely to provide an “out” for the prospective donor than if you stay silent until after the prospect has responded. If they say no, this is where the negotiation starts. The rest of the script is delivered in conversation -- explaining the need, negotiating, trying to close and, finally, expressing appreciation for the their time, no matter what the outcome.

The prospect is likely to have questions – answer them, but keep coming back to the close. Feel free to ask questions – about their interest in the issue, thoughts on public policy related to the issue, or other topics. Find common ground with their answers and then use that information to help close the commitment.

When you are done, please verify the amount of their pledge, provide our address and ask when the check will be mailed. Ask checks should be made payable to “Coloradans For Clean Energy” and mailed to us at Coloradans For Clean Energy , 1536 Wynkoop Street, Suite B-100, Denver, Colorado 80202.

Once again, be sure to thank everyone, regardless of the level of their participation.

Please call Stephanie Bonin at (303) 573-5121 to let her know about any pledges you receive.

SAMPLE RESPONSES TO MAJOR EXCUSES

During the solicitation process, you will hear many excuses regarding why people feel they cannot contribute, are unable, or are unwilling to contribute anything close to the amount you are requesting. People will always have excuses. How you respond to them is important. In that regard, below please find several sample responses to common excuses.

IF NOT INTERESTED, SUPPORTING OR CONTRIBUTING

If the prospect is not supporting or contributing, ask them why they don't support the initiative – or if, they do, why they do not want to contribute. See if you can address and overcome their concerns. Here is a sample response:

Let me address your concerns. Proposition xx, the Colorado Renewable Energy initiative will not increase your energy costs. On the contrary, as oil and gas prices rise in response to political leverage or turmoil, renewable resources such as wind and solar will remain constant and not subject to swings in price.

Importantly, we all know we must wean our dependence on foreign oil and gas. Proposition xx will force the utilities here in Colorado to start that process.

Passage of Proposition xx not only benefits us from a price and security standpoint, it also helps the environment by reducing the amount of dirty fuels like oil and coal needed to develop electricity.

We have a tremendous opportunity. In fact, if the opportunity were not so great, I would not be asking so aggressively for your support and help.

I would ask that you re-consider your position and make a contribution. And, if the information I have provided does not motivate you, then I would ask that you (give because I am asking you to do so as a personal favor) or (tell me what information you need that would sway you)

IF NOT INTERESTED IN CONTRIBUTING

I can appreciate that you may have other activities and needs that demand your attention and your money, but I am asking you to reconsider:

Because we are friends (neighbors) (colleagues) (associates)

Because the need and the opportunity are so great.

Because passing Proposition xx will force the utility companies to change their old habits and provide more electricity from clean, renewable resources such as wind and solar.

I can appreciate that your interest in passing the Colorado Renewable Energy initiative may not be as great as mine, but I'm asking that you help, if for no other reason than the fact that I am asking.

I'LL DO SOMETHING, SEND ME AN ENVELOPE

I'm glad to hear that you're willing to (send) (consider) a contribution. I will be happy to send a remittance envelope to you. However, I'd like to get an idea about the amount of the contribution or the range you are considering. I ask that not because I want to pressure you, but simply so I can get an idea about the contribution amount you're considering.

If you are not comfortable giving me a range, perhaps you can give me a minimum figure such as \$ _____. I know that you might decide to send more money, and we would very much appreciate that, but knowing that we can count on you for a minimum amount enables us to budget more effectively.

GENERAL SOLICITATION NOTES

When people try to brush you off by saying "I haven't made up my mind" or "I don't want to get involved," you can either accept their answer or push back. I encourage a little push back or, depending on your relationship, a big push.

Successful fundraising means understanding and accepting the concept that you will never get more than you ask for. In this respect, it is helpful to view fundraising as a negotiation – people never want to give you as much as you want from them, so you need start high and negotiate down. Successful fundraising is about setting the agenda and forcing the prospective donor to respond to you, not the other way around.

If you allow a prospect to tell you how much they will donate, it will be difficult to negotiate a larger contribution from them. If you initiate the "ask," you can start high and negotiate "down," and, quite possibly, end up with a larger contribution than what the prospect would have originally offered, if given the opportunity.

Fundraising is a numbers game -- the more people you ask, the more people you can solicit and negotiate with, and the more money you will raise.

Most people do not like raising money – some even hate it. However, without proper funding, this initiative, like all others, will fail.

It is always interesting to see the juxtaposition of people who are more afraid of asking for money (actually they are afraid of the rejection), than they are of not having enough money to get their message out or accomplish their goal.

Below, please find some suggested language that may help in your fundraising solicitations on behalf of Coloradans For Clean Energy.

WRONG (GENERAL)

- "Will you help Coloradans For Clean Energy by making a contribution? Or, "Give us what you can afford?"

RIGHT (SPECIFIC)

- "Coloradans For Clean Energy or (our environment) or (the renewables community) needs your help. Can we count on you for a contribution of \$1,000?"
- "Will you join me in helping Coloradans For Clean Energy by making a contribution of \$1,000 today?"
- "I wouldn't be asking for so much if both the need and the opportunity were not so great. Can we count on you for a contribution of \$250?"
- "We need to raise \$5,000 this week. We're \$2,000 short of our goal. Can you help close the gap with a contribution of \$250?"
- "I need to raise \$750 today and I am \$450 short of my goal. Can you help me close the gap with a contribution of \$200 or \$100?"
- "The campaign to win approval of this important initiative has just gotten underway, and already the opposition is attacking us."

NEGOTIATE

- If, after you ask for a contribution of \$1,000 and are offered something much less, do not say, "Ok, that's great, thanks." It's time to negotiate -- you should say, "I appreciate that, but I must ask if you would reconsider the \$1,000," and add "I wouldn't ask you for so much if the need and opportunity were not so great."
- If they refuse to increase their pledge say, "Okay, I appreciate your commitment, but let me ask if you could add just another \$100 (or whatever amount is appropriate given the level of their pledge) to your pledge."
- Another good line for "pushing" people is, "How close can you come to that number?"
- If a prospect tells you they have to talk to a spouse, partner or boss, ask when that conversation will take place and what amount will be discussed. After you have those answers, let the prospect know that you will call back after they talk with the spouse, partner or boss.

CLOSING

- "When can I send someone to pick-up the check?"
- "Will you be mailing the check today?" ("If not today, when?")
- Please make your check payable to the "Coloradans For Clean Energy" and mail it to us at Coloradans For Clean Energy, 1536 Wynkoop Street, Suite B-100, Denver, Colorado 80202.

A FEW TAGLINES

- How close can you get to that number?
- If I can't count on friends like you, who can I count on?
- You have been a good friend, and I hate to ask for your help, but I am left with no choice.
- We cannot expect anyone to invest in us or our cause, if we are not willing to invest ourselves.
- If we don't fight for ourselves, no one else will...and if we fail, the only ones to be blamed for that failure will be those who refused to answer the call and step-up to the plate when the opportunity presented itself.
- It's my belief that if you fail to act now, you will be reacting forever.
- I will respect your decision not to contribute if you oppose our effort. However, I have a hard time accepting your "sitting this one out" given the historic opportunity, what is at stake, and your past support for renewables and the environment.
- If you support our efforts, but do not contribute, then that is almost worse than being opposed.
- As a friend (colleague) I would like to ask you to step off the fence and make a decision to support and contribute. Will you do that?
- I am coming to you as a leader in our community (or industry) and asking you to take a position of leadership in this campaign. Will you do that?" Will you stand-up with me and (use names of other donors) and be counted?
- Others have also told me they want to see how things shake out before they make a decision on getting involved. Hedging your bet ignores and puts at risk the historic opportunity in front of us. Sitting on the fence simply puts us and the entire community on hold.
- There is no time to wait for things to shake out. If we do not start getting our message out, not only will the battle be more expensive later, but the risk of defeat becomes that much greater.
- I am asking that you demonstrate your leadership by joining me in this historic effort. If we are successful, we will begin the process of forcing utilities to provide energy from renewable resources and reducing our reliance on expensive and polluting fossil fuels.
- If you're tired of always reacting, then join us in our pro-active attempt to protect our environment and force the utilities to purchase more of their electricity from renewable resources.
- The opportunity to participate is on-going, but the need is immediate.

FINAL THOUGHTS

- You never get more than you ask for.
- Your prospect may never contribute what you ask, but they will likely contribute more than they would have had you not asked for so much in the first place.
- Set the agenda. Force the prospect to respond to you. Ask for a contribution before one is offered. It is much easier to lower the amount you are asking for than it is to raise the amount being offered.
- No matter how small a contribution, even if nothing at all, thank the prospect for their time. They may not contribute today but may do so later, and we do not want to alienate them.
- We want everyone to make a capacity gift. Everyone's capacity is different, but everyone has the ability to give – even if it is only \$5.00.

**COLORADO RENEWABLE ENERGY INITIATIVE
PLEDGE FORM**

Your Name: _____ **Date:** _____

Donor Information

Name _____ Phone _____

Address _____ City _____ State ___ Zip _____

Home Phone _____ Work Phone _____

Mobile Phone _____ E-mail _____

Amount of pledge: _____

Payment by check or credit card?

If check: Will they be mailing the check? Yes _____ No _____

If yes, when will they be mailing it? _____

If credit card: Type of card: ___ Visa ___ Mastercard

Credit card number _____

Expiration date _____

Name on the card _____

Does this person have a relative in prison? ___ Yes ___ No

If yes, which prison? _____

Please return this completed form to Coloradans For Clean Energy by fax or mail. The fax number is (303) _____. Our mailing address is 1536 Wynkoop Street, Suite B-100, Denver, Colorado 80202.

If you have any questions or need any assistance, please call Stephanie Bonin at (303) 573-5121.