



Revising Your Rolodexing Check List

One of the most critical steps in developing your fundraising plan for the general is identifying potential donors and donor groups. Strategic rolodexing helps fundraisers organize donors, understand a donor's motivation to give, and prioritize your asks.

Rolodexing begins with the candidate's Personal Circle and extends through Ideological, Ax-to-Grind, and Power Circles, with the amount of time that must be invested and the candidate's viability increasing the farther the circles extend from the center.

Except for the candidate's Personal Circle, finding and listing these donors will take research; start with the candidate's rolodex/contacts, go to local organizations' websites or annual reports to identify leadership, and locate a veteran political fundraiser who can profile local donors. Talk to like-minded candidates and organizations and ask them for leads as well. Building a list of people who can connect to other people is essential to growing the list.

Candidate Personal Circle:

These are the people who will give because they have a close relationship with the candidate. Loyalty moves these donors to look past differences in ideology or party affiliation and keep supporting the candidate regardless of her standing in the polls. Now that you've won the primary, are there people to go back to for more money?

1. Immediate Family and Friends (ALL of them) – how much will each family member or friend give? Then how much can they raise from their networks?
 - a. Spouse
 - b. Children
 - c. Parents
 - d. Grandparents
 - e. Close Friends
 - f. Neighbors
2. Elementary School – think of students, favorite teachers, principals, school board members, coaches, teammates, clubs, neighbors, etc.
3. Junior High School – think of students, favorite teachers, principals, school board members, coaches, teammates, clubs, neighbors, etc.
4. High School – think of students, favorite teachers, principals, school board members, coaches, teammates, clubs, counselors, neighbors, etc.
5. Undergraduate – think of students, TAs, favorite professors, clubs, advisors, coaches, teammates, roommates, etc.
6. Post Graduate – think of students, TAs, favorite professors, clubs, advisors, roommates, etc.
7. Current Employer(s) and Colleagues
8. Past Employers and Colleagues (Every Job)
9. Current Boards and Commissions

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EMILY'S LIST

10. Past Boards and Commissions
11. Current Volunteer Organizations
12. Past Volunteer Organizations
13. Church/Synagogue
14. Service Clubs – Rotary, Kiwanis, Lions, Legion, etc.
15. Social/Hobby Clubs – Wine, Sports, Book, Food, etc.
16. Online Social Networks – people who aren't captured above
 - a. Facebook
 - b. LinkedIn
 - c. Others
17. Professional Subcontractors (Suppliers, Vendors, CPAs, Attorneys, Manufacturers, etc.)
People who make money off of your company
18. Personal Subcontractors (Insurance agent, CPA, Attorney, Realtor, Stylist, Investment Banker, Car Dealer, Veterinarian, Doctors, Dentists, Travel Agent, Groomers, etc.)
People who make money off you and your family
19. Lists - cell phone, email contact list, business cards, Blue Book, Red Book.

Ideological: Democratic-leaning supporters who will get behind you because you are a member of that circle. Examples of these are political organizations such as Democratic, choice, LGBT, ethnic groups, environment, labor, animal rights, tribal, etc. Also look through any past legislative network - who did you carry bills for, who have you met with, what business have you toured – go through any available schedules to determine past meetings/contacts, were you given an award by anyone – who is on their board, are there any national groups or task forces you have served on – who have you met at conferences or served on boards with? Who will support you now that you're the nominee? Who supported your opponent(s) in the primary but will give now? *Who do you know?*

Ax-To-Grind: Ax-to-Grind donors give because the opponent's victory would adversely affect their personal interests, or has already done so. They have tremendous incentive to weaken your opponent and strengthen your candidate. Their allegiance is not directly to your candidate, but to ANY candidate willing to go up against the perceived bad guy. *Who do you know that fits this description?*

Power: Donors in the Power Circle give to protect and advance their economic interests. These are the folks that come on very late in a campaign. Power Circle donors tend to give once a candidate has demonstrated viability. They include business interests, labor unions, political action committees (PACs), and professional associations. *Do you have existing relationships with anyone who would fall into the power circle?*

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