

Amy McGrath Fundraiser Plan

Amy McGrath Fundraiser Checklist — April 15th visit

Practical, step-by-step checklist to plan, execute, and follow up on political fundraising event.

Use this as a master checklist.

Note: She will be delivering an important National Security Policy at the Center for Critical Thinking Event the night before.

Pre-Event Planning (8–12+ weeks out) February, 2026

- **Define goal:** Set **financial target**, attendance target, and non-monetary goals (new donors, media coverage).
 - **\$100 K for the Main Large Donor Fundraiser**
 - **\$20 K for the Small Donor Fundraiser**
- **Budget:** Create **line-item budget**
 - Venue Rental
 - Catering
 - AV
 - Marketing
 - Promotion of Event
 - Signage/Stickers/Banners/Buttons
 - Policy Pamphlets
 - Security – No Black Shirt Police With Visible Weapons – Must look like Secret Service
 - contingency 10%.
- **Target audience:** Build segmented lists:
 - **Major donors identified**
 - **Target Prospects**
 - Centrist Democrats – Meet with Collier County Democratic Party
 - Independents – Search Voter Rolls
 - Disenfranchised Reagan Republicans – Develop Network thru Lincoln Project
 - Retired Military – Retired Military Officer Network
 - National Security Leaders – contact Mike Smith
 - **Sponsorships:** prepare sponsor packet and outreach timeline.
 - Focus on Prominent Names who carry Gravitas with others
 - Donation Scripts: Develop Donation Scripts for each target prospect group
- **Pre-commitments:** Identify top 10–20 prospects for **early asks**;
 - Secure lead donations
 - Table hosts before public invites.
 - Overnight stay at Large Donor Home for Amy
- **Venue & date:**
 - Book venue(s), confirm capacity, accessibility, parking, and backup plan for weather.
- **Permits & compliance:** Confirm local permits, liquor license (if applicable), sales tax rules, and nonprofit solicitation rules.

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- **Insurance & contracts:** Obtain event insurance and sign vendor contracts with clear deliverables and cancellation terms.
- **Project Timeline:** Create a master timeline with milestones and deadlines for invites, sponsorship closes, and program finalization.
- **Coordination:** Main contact for the McGrath fundraising:
 - Max O'Beime email max@lafaveandassociates.com
 - For over 25 years, we have served as fundraising consultants for U.S. Senate, House, and Presidential campaigns, as well as for national Party committees, non-profit organizations, and other causes.

Program & Content (4–6 weeks out) March 1st-15th

- **Run of show:** Draft minute-by-minute **program** (doors, welcome, speeches, auction, close).
- **Speakers & emcee:** Confirm **emcee**, keynote, and any testimonial speakers; collect bios and talking points.
- **Speech prep:** Provide speakers with **3-5 key messages**, time limits, and a rehearsal schedule.
- **Script & cues:** Prepare a full **script** for emcee and AV cues; include transitions and contingency language.
- **Visuals & materials:** Finalize slide deck, videos, printed programs, signage, and donor recognition boards.
- **Rehearsal:** Schedule a full tech and speaker run-through 24–48 hours before the event.

Logistics & Day-Of Operations Week of April 5th (2–7 days + event day)

- **AV & staging:** Confirm soundcheck, microphones (lapel/handheld), projector, lighting, and backup equipment.
- **Catering & bar:** Finalize menu, dietary options, service timeline, and bar staffing; confirm headcount.
- **Registration & check-in:** Prepare guest list, name badges, printed tickets, mobile check-in, and a staffed registration table.
- **Seating & flow:** Create seating chart for VIPs and sponsors; plan traffic flow for registration, dining, and auction areas.
- **Volunteers & staff:** Assign roles: greeters, registration, auction runners, donor escorts, photographer, security. Provide a one-page role sheet.
- **Security & medical:** Arrange security presence and first-aid plan; brief staff on emergency procedures.
- **Signage & branding:** Place directional signs, banners, sponsor recognition, and branded backdrops for photos.
- **Handouts:** Have Pamphlets and Info material printed and ready for distribution
- **Onsite finance:** Set up secure cash handling, credit card terminals, and a locked drop box for checks.
- **Contingency kit:** Pack extra name tags, pens, tape, extension cords, batteries, and printed scripts.

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- **Press Releases and Press Invitations:** Ensure coverage of the event by social media, TV and Newspapers
 - **Key Donor Scripts:** Why they are donating money – ensure these are well designed to trigger the three elements of: 1) Reason/Logic, 2) Ethics/Moral High Ground, 3) Emotion/Passion
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Fundraising Mechanics (planning + execution)

- **Donation channels:** Enable **in-person**, mobile/text giving, and online giving with real-time tracking.
 - **Donor levels & asks:** Prepare suggested ask amounts for each donor segment and scripts for solicitors.
 - **Pledge capture:** Use pledge forms or digital pledging; collect contact info and payment timelines.
 - **Major donor stewardship:** Arrange private donor briefings, VIP seating, and post-event follow-ups for lead donors.
 - **Receipting & compliance:** Prepare tax-deductible receipts and documentation for in-kind gifts; ensure compliance with nonprofit rules.
 - **Ensure Legal Compliance:** All campaign requirement studiously complied with
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Post-Event & Follow-Up (24–72 hours + 30/90 days)

- **Immediate thank-you:** Send personalized **thank-you emails** within 24–48 hours to attendees, donors, sponsors, and volunteers.
 - **Receipts & documentation:** Issue donation acknowledgments within the required timeframe.
 - **Donor follow-up:** Call or meet major donors within one week; confirm pledge fulfillment timelines.
 - **Financial reconciliation:** Reconcile revenue vs. budget, tally offline gifts, and prepare a final financial report.
 - **Debrief & lessons learned:** Hold a staff/volunteer debrief within 7 days; capture wins, gaps, and action items. This will be important for future campaign fundraisers, such as David Jolly & Alexander Vindeman
 - **Recognition & stewardship plan:** Publicly recognize sponsors and top donors (with permission); add new donors to stewardship pipeline and schedule cultivation activities. Ensure anonymous donors remain anonymous.
 - **Metrics & reporting:** Report outcomes to Campaign Organizers; track ROI, new donor acquisition, retention, and lifetime value.
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Quick Templates & Tools to Prepare

- **One-page event brief** (goal, audience, budget, timeline).
 - **Speaker one-pagers** (key messages, time limit, AV needs).
 - **Volunteer role sheets** (tasks, timing, contact).
 - **Donation scripts** for phone, in-person, and auction asks.
 - **Post-event email templates** for thank-you and pledge reminders.
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