I. Intro: 6:34pm
   A. Presenter Jason Rosenbaum, founder of SewardSquare Strategies - 15 years of digital fundraising experience, google elections media team 2014, Clinton 2016 digital, 3 cycles with DCCC

II. Main components
   A. Email fundraising program
      Solicit support from supporters via email - Primary vehicle to deliver revenue to organization
      1. What makes a successful program?
         a) Frequency
            (1) For a large org, 50-60 emails/mo. - this allows us to filter users that are likely to open, unlikely to open, and send accordingly
            (2) This also allows us to maintain our list's integrity and send with the right frequency to the right people
         b) Testing & measurement
            (1) Track what people respond to - surveys, graphics, petitions, direct asks, etc
            (2) Tailor programs based on those behaviors
         c) Content
            (1) Deliver as wide a variety of content as possible
            (2) ALWAYS PROVIDE A CALL TO ACTION
            (3) Many orgs use email to deliver information, but for a solid program, there should always be a call to action
      2. The Tech
         a) Bulk Emailer
            (1) Program to deliver the thousands to millions of emails you send
            (2) Using a personal email gets flagged at a certain point or the email service caps how many people you can send to
         b) CRM (customer relationship manager)
            (1) Stores supporter records,
         c) Content formatting
            (1) People use lots of different tools to read emails, so we have to make sure emails are readable across multiple platforms
         d) Deliverability Monitoring
      3. The Team - in-house or consultants
         a) Direction/Strategy
         b) Email Copywriting
            (1) Likely the most labor intensive facet
         c) Email/SMS Production
            (1) Coding, development, implementation
         d) Project Management
            (1) Coordinating the internal processes of ideation through approval
         e) Data Management
            (1) Segmenting lists & sending different messages/programs to different segments of the lists
            (2) Growing lists
            (3) Building models of donors to find more prospective donors
         f) Content/Graphic Design
            (1) Developing aesthetic facets to increase appeal
      4. Questions:
a) Diane: If you’re using a consultant to send emails, do they take a percentage or a flat fee?
A: It depends on the firm - can be by percentage, can be retainer. A percentage is more of a risk for the consultant and can cost the client more depending on the program’s success. For donor acquisition, it generally switches to a

B. Strategic list building program
Strategies to acquire donors - The gas to fuel the engine with the objective of developing a long-term program
1. Donor Acquisition & List Growth
   a) Organic (free)
      (1) Exchanging email lists with partner orgs
      (2) Online petitions
      (3) Joint actions
   b) Paid
      (1) Digital advertising
         (a) Value isn’t just in the direct revenue but in email collection
2. Criteria for analyzing success
   a) Search for lowest rate for impressions/acquisitions
      (1) Analyze which donors are the highest quality donor prospects (lower cost per acquisition/higher donor/donation rate)
      (2) Which issues are the best quality donors? What kind of content?
   b) Time to profitability
      (1) After about 2-3 months of running a program, the payback window becomes pretty clear and allows org to budget long-term (because it’s a long-term strategy)
         (a) Different for a party than with a campaign, since campaigns are short-term cycles - it’s still important to build out of cycle
3. Labor
   a) Ad Development
      (1) Across networks, platforms, formats
      (2) Formatting itself
   b) Placement & Platform management
   c) Ad Performance & Analysis
      (1) Considering how people are responding to ads
      (2) Making adjustment recommendations accordingly

III. Investment
A. Tech
   1. 5-10k/mo
B. Labor
   1. 30k-80k/mo
   2. In-house, up-front costs are greater
   3. With an outside firm costs tend to be lower up-front
   4. Developing program with a firm to establish foundations then handing off to internal team tends to be cost-effective
C. Acquisition
   1. 10k+/mo, largely depending on payback window
   2. Lower hanging fruit costs the least, but the faster they’re harvested, the more the rest costs
IV. Questions
A. Rocky: What's your favorite email program?
   A: Al Franken was always hilarious.
B. Rocky: How much work does the CRM cost? Is it pretty plug & play at this point?
   A: Yes and no - you have to set the criteria, select targeting tools, analyze efficacy, keep major donors out of lists & recognize their donor histories (including the multiple email addresses people use)
C. RL: Lengthy content based emails surprisingly tend to do better for my org’s fundraising efforts.
   A: Content really matters and for informative/issues orgs this tends to be the case. Often, people won’t even click the links in-copy but will click the link or button at the very bottom of the email.
D. Diane: Can I share this presentation with my media committee?
   A: Sure.
E. RL: I unsubscribe from any emails from Motherboard because their emails are all “DOOM”
   A: Again, content matters and that’s profitable short-term, but doesn’t build the program long-term and can harm a brand in the long-term as well.
F. Hene: Everybody has their databases and the party has the opportunity to send to an already large grassroots base (Dem club members, county committee members, delegates) to inform about what the party is already doing and planning to do.
   A: The amount of revenue possible here in one of the largest states with the largest Democratic base is immense - almost really a national scale program.
G. Debra: What type of skills would an individual need to build a robust digital program?
   A: Initially it would require a 6-8 person team because of the diverse individual skills required for the various roles. Digital isn’t just its own vertical within an organization - it integrates into most facets of an organization. Often, an email program is held back from what they think will raise revenue. Trusting a good team (AND DATA) is crucial.
H. Ben: Bernie tends to be the strongest example of a large-scale small-dollar campaign. How big is that team?
   A: Bernie’s program is unique - it’s a program built over decades but I don’t know the size of that team. Hillary’s team was about 40-50 people. SS’s advertising team is about 35 people. Spent 30m, made 140m.
I. Debra: Is there anything else that should be considered when building out these teams?
   A: Digital isn’t a single entity - every organization breaks into different functions, so there’s revenue, mobilization, messaging (comms). Not many firms are truly well-versed in all 3 verticals, and in the past consulting used to strictly be fundraising, but now are branching out into these other areas.