CAMPAIGNING
TO ENGAGE AND WIN

A Guide to Leading Electoral Campaigns

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A Note about this Manual

We believe this manual will get better as you put the concepts outlined here into practice and let us know what works and what doesn't. Please send your comments - things you appreciated and things that we need to improve - to info@neworganizing.com Please also send samples or templates you're willing to share with others in future editions. Thank you!

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Acknowledgements

This is a manual built by campaigners for campaigners. We're grateful to the many who provided input, ideas and feedback along the way.

Thanks to Robby Mook who had the vision for this in the first place and gave many rounds of feedback to see the first 2010 edition to completion. Karen Hicks, Doug Hattaway, RJ Bee and Susan Markham put hundreds of hours into developing the core content for this manual and for the New Organizing Institute's campaign manager trainings. James Hannaway hustled us all into many meetings, coordinated feedback from dozens of campaigners, and tested the material in his own campaign as a first-time manager, which generated new tools and templates for this 2012 edition.

Angela Meyer has a real knack for turning concepts into visuals and designed the key images and design for the manual. Thanks to Natasha Sutton for additional design support.

We particularly appreciate the critical reading and feedback offered by many from interviews in the early stages of the project to final editing at the end: Jennifer Pihlaja, Marlon Marshall, Doug Sosnik, Jeremy Bird, Melissa Ryan, Josh Wolf, Pilar Weiss, Shaunna Thomas, Abby Curran, Achim Bergmann, BJ Neidhart, Brian Smoot, Chris Esposito, Corey Platt, Dan Cramer, Derek Humphrey, Esther Dickenson, Frank Costanzo, Jackie Bray, Mark Abanto, Matt Filner, Rick Fromburg, Rodd McLeod, Sarah Scanlon, Simone Ward, Stacy Berger, Tim Tagaris, Zack Wineburg, Alex Lofton, Dan Crawford, Lucas Fleischer, Sam Witherbee, Angela Botticella, Betsy Hoover, Aharon Wasserman, and Ethan Roeder.

The content of this manual is drawn from the experience of many organizers in many campaigns. However, some of the core practices come from the teaching of Marshall Ganz who has trained many of us to structure campaigns, use time more creatively, and build robust, motivating volunteer programs. Thanks to Marshall for inspiring many elements of this approach, and for training many of us to build organizing campaigns that engage people in purposeful ways. Thanks also to Jerry Hauser, Alison Green and the Management Center for their groundbreaking work in their maual, *Managing to Change the World*, and for giving permission early in the project for us to draw on their work.

None of this would have been possible without the vision and commitment to progressive values embodied by Judith Freeman, Executive Director of the New Organizing Institute. Thank you, Judith, for providing the resources, time and faith in us that made this whole project possible.

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FOREWORD:
CAMPAIGNING IN 2012

The last four years in American politics have been a roller coaster ride. The 2008 election was a transformative moment in electoral campaigns, with broad voter participation across the electorate, and record levels of youth and minority turnout across the country. That broad engagement was spurred by a dynamic mix of authentic, inspirational campaign narrative that motivated volunteers and voters; time-honored rigorous field organizing, media and fundraising strategies; and innovative use of technology, new media, targeting and data management.

In 2009, however, we witnessed the emergence of a strong protest movement in the Tea Party, which they effectively funneled into electoral success in 2010 at the local, state and federal levels. This surge in conservative energy was matched by a contrasting decline in voter participation and turnout in 2010 among the same populations that had engaged so deeply and broadly in 2008—particularly young people and people of color. The result was a dramatic swing to the right in 2011 legislative bodies.

Right now 2012 is a story yet to be written, in part by you—the Campaign Managers of the future. We've seen in the last few years that change isn't limited to Washington, DC. In America change has always come from the bottom up, including local city councils and school boards and state houses across the country. This year we need progressives running at all levels of office, and there are more than 500,000 opportunities for candidates to run at the state and local level.

This will be a year quite unlike any other cycle, with incredible new challenges to be faced, as well as emerging opportunities to be seized.

OUR CHALLENGES

Here are some of the obstacles we expect to face in the 2012 cycle that you will have to negotiate to overcome as a manager:

Super PACs and unlimited, anonymous corporate funding

The greatest unknown this cycle will be the impact of the Supreme Court's Citizens United decision, which allows corporations and other organizations to contribute anonymously and without limit in the electoral process. This has prompted the creation of Super PACs that will almost certainly spend more in some races more than the candidates' campaigns or party structures combined.

Increased Noise

An increase in anonymous spending at the federal level means that voters' TVs and mailboxes will be crammed with advertising. The question facing Senate, Congressional, state and local races is how to break through the noise. In order to get noticed, smaller campaigns will need to be creative about how to interact with a national narrative over which they have little control.

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Tougher Fundraising

Although fundraising is always challenging, the economic downturn has made it more difficult to raise money. This year it will be more critical than ever that campaigns find new ways to recruit more donors, including low-dollar donors.

Motivating the base

Millions of Americans were motivated to engage in the electoral process for the first time in 2008, inspired by the possibilities of change. Since change takes time, and since Congress has been particularly gridlocked in the last year, many Americans are disappointed and frustrated, with ratings of Congress at historic lows. Since competitive state and federal races help drive turnout, this disappointment could affect voter turnout for races up and down the ballot unless we face it head on. Incumbents at all levels have work to do this year to demonstrate that they can deliver concrete change that improves voters' lives. And campaign managers and campaign leadership teams will have to invest time early to re-engage and re-motivate the progressive base.

Voter registration

Voter registration rates in the progressive base continue to trail the rest of the population. According to 2010 census data, registration rates for unmarried women, African Americans, Latinos, Native Americans, and Asian Americans is collectively 11% lower than the rest of the population. Registration rates among key segments of this constituency have fallen since young people, women and people of color have been hardest hit by the foreclosure rates and job loss that cause people to move and fall off the voter rolls.[1]

Voter suppression

After historic levels of participation in 2008, some state legislatures across the country set out to make it more difficult for minorities, young people and the elderly to vote. Some did it by abolishing same day registration. Others made Voter ID requirements more stringent. Others made independent voter registration drives next to impossible. All campaigns in 2012 will have to navigate new laws, and make voting as easy as possible for new or infrequent voters.

Media fragmentation

The media's continued fragmentation makes it harder to engage a broad spectrum of the electorate around a clear narrative through any one channel. At the same time, the decline of local newspapers has reduced the earned media coverage of local policy and politics.

Complicated targeting

Because of the new voter registration and first-time voter turnout during 2008 there are millions of new people in the voter files that we have very little information about, which will make calculating projected turnout and targeting difficult.

These challenges will test all four pillars of a successful campaign – message, money, mobilization and management. To address these challenges, effective campaign managers will have to be more creative and dynamic than ever before.

[1] Joy Cushman, Ben Farley, Heather Booth, "Engaging the Emerging Majority: The Case for Voter Registration in 2012 and Beyond," New Organizing Institute, October 2011.

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OUR HOPE

There is hope! While challenging, the current political environment also offers many opportunities for nimble managers and candidates to seize:

Reform politics

The tough economic environment of the past few years, combined with the new energy around economic organizing in the last year, is stoking intense desire for real reforms to build a better and more fair economy, and to reform government so it works for regular people and not just the corporate elite. This is the best environment we've had in years to make the case for bold progressive economic solutions at the local and state level as well as the national level.

Registering new voters

There's a reason that some folks have put so much effort into making voter registration more difficult in the last three years. Since the last Presidential campaign in 2008 millions of Americans have turned 18. Every month 56,000 Latino citizens and 58,000 African-Americans turn 18 and become eligible to vote if they are registered. The large majority of these young people are progressive voters. Once these citizens are registered, they are highly likely to turn out to vote in a Presidential election year. Investing in registering new voters can transform the electorate in your race.

Re-engaging 2008 voters

While voters are disenchanted with the pace of change, we have seen hard-won progress at all levels, from national health care reform and student loan relief to state wins, like New York passing marriage equality and Maryland passing in-state tuition. We need to celebrate the progress we have achieved, in order to motivate our base to re-engage and take leadership this year. We also need to respect voters by recognizing the real economic and political challenges we still face, and provide actionable strategic solutions that will make a real, observable impact in people's lives.

Newly engaged leaders and volunteers

Many who had never engaged in politics before 2008 are now running for office themselves at local and state levels, or stepping into campaign leadership roles for candidates who inspire them. NOI and our partners are providing tools and resources for small local campaigns through our Candidate Project at www.candidateproject.org .

New media

While traditional media is becoming more fragmented, new media offers all campaigns, including smaller ones, the opportunity to engage the most persuasive form of communication—word of mouth. Campaigns that engage bloggers effectively and that build strong social networks will have a cutting edge.

Targeted tools

Technology can now be scaled in down-ballot races to help reach new and once obscure segments of the electorate, and to engage voters with social outreach through their trusted networks.

To capitalize on these opportunities and to counter the specific challenges of the coming election cycle, this manual provides strategic guidance and best practices for how to take an integrated approach to running an **Engagement Campaign**.

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THE ENGAGEMENT CAMPAIGN

An Engagement Campaign follows a typical campaign timeline of engaging and turning out voters, but adds on an early "Engaging Supporters" phase, giving you extra time to develop all the human capital possible for your campaign. This helps you to build support and enthusiasm across political and social networks long before campaigns normally begin and gives your campaign a pathway for turning supporters into donors, volunteers and campaign leaders.

In addition to capitalizing on human resources, an Engagement Campaign draws on recent breakthroughs in new media and technology across every division of the campaign structure to better find, motivate and turn out supporters.

This manual aims to provide guiding principles, strategic processes, and program samples to help campaign managers develop the kind of integrated Engagement Campaigns that can succeed.

While the campaign world is transforming rapidly, it has not changed entirely. A broadcast television advertisement still reaches more voters than 100 volunteers and in almost every case a good week of candidate call time will raise more than a fundraising email.

But when your anticipated margin of victory is under 5%, the incremental opportunities that wide-scale engagement offer cannot be ignored. And remember, your goal is not just to win the campaign but to enter office with an army of supporters at your side, ready to fight for the legislative change that will improve our lives.

In short, good managers need to have it both ways—25 hours of candidate call time a week AND a smart online strategy to fundraise; a robust earned and paid communication program AND volunteer organization to engage voters; a rigorous voter contact program AND creative ways of engaging voters through their social networks online and offline.

Leaving anything on the table is more than any competitive progressive campaign can afford to sacrifice. The change we're fighting to win is too important.

It's up to campaign leaders like you to continually innovate, creating new ways of engaging supporters and voters to win the change we seek for our families and our country. This is just the beginning. . .

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Chapter 1

LEADING

AN ENGAGEMENT CAMPAIGN

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CHAPTER 1
LEADING AN ENGAGEMENT CAMPAIGN

INTRODUCTION

YOUR JOB IS TO WIN

No matter what level race you may work on, as a Campaign Manager you are ultimately responsible for building and leading a team that turns out a winning number of votes for your candidate by Election Day. Specifically, you are responsible for:

- **Building and managing a team** of staff and consultants, setting clear, measurable, WINNING campaign goals and creating a culture of excellence and commitment to meet those goals
- Developing a **strategy** for organizing people and money over time to win. This will require constant re-strategizing as the campaign environment changes
- Creating a **budget** that pays for your strategy, adapting it as your strategy evolves, and raising the resources to execute it
- Working with your candidate and campaign team to develop an aspirational **campaign narrative** that explains the values that motivated your candidate to run and that inspires other people to support your candidate and become active with the campaign
- Organizing a **communications strategy** that integrates paid media, earned media, online media, and volunteer voter contact to communicate your campaign narrative.
- Creating a **mobilization strategy** and volunteer infrastructure capable of turning out more voters than your opponent
- **Managing your candidate** to keep her and her family focused, motivated and doing the work that needs to get done to win
- Maintaining the **commitment and resourcefulness** it takes to do whatever it takes--consistent with the values and principles of your candidate and campaign—to win.

We've designed this manual to help you meet these responsibilities. It covers the basics for leaders of campaigns of every size, from those seeking a school board seat to those seeking a Governor's seat, for those who want to combine new tools with proven, tested methods to engage more people and garner more resources to win.

We have named the kind of campaign we describe here an "Engagement Campaign," because it's focused on engaging as many supporters and voters as possible in meaningful ways that bring resources to your campaign to win.

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PRINCIPLES OF AN ENGAGEMENT CAMPAIGN

RESOURCEFULNESS

Use all available resources: Time, money and people

Your job is to engage others to work with you to motivate and turn out more supporters than your opponent. Good managers do this by paying attention to three vital resources: **time, money, and people**.

Some campaigns only pay great attention to financial resources—building, tracking and spending them, without mastering the art of building, tracking and deploying human capacity with the same discipline. Such campaigns have little capacity to turn out their base, or to counteract a late surge from the opposition when television/radio/mail "clutter" makes it hard to break through with paid media.

Other campaigns focus on "grassroots support," to the exclusion of raising money. These campaigns lack the ability to define themselves through paid media or respond to negative paid advertising.

In today's campaigns, you need both resources—people and money—to win. As a manager, it's your responsibility to build a strategy to generate and deploy both key resources on a carefully planned timeline.

Make creative use of new media and data

The Engagement Campaign harnesses tools and techniques now readily available to reach more people at lower cost, engage them in new ways, and rally more resources to help you win.

This means making strategic use of new media, technology, data, advanced targeting, and providing tools and platforms that amplify the effects of traditional campaign activities. You still have to raise money, recruit volunteers on the ground, and have a strong campaign narrative, but these new tools provide solid data management for field efforts, an easy online route for supporters to get connected to the campaign, and an instant communication mechanism that can be harnessed for rallying supporters, refuting lies, or raising money.

All of your campaign resources should be focused on engaging voters—in a motivational narrative and compelling strategy—and turning your supporters out to vote.

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MOTIVATION

Your narrative and strategy need to motivate people.

Since one of your major resources is people, and since people are the resource that generate your other key resource—money, an Engagement Campaign is all about motivating people. It's about motivating staff, volunteers and voters to take action in support of your candidate. To do that, you must do more than merely talk about the candidate's biography and policy positions. To engage people, you must inspire them.

In an Engagement Campaign, an aspirational narrative will motivate supporters and engage voters by focusing on their hopes and values. But an Engagement Campaign isn't just a message campaign directed at voters—it's a campaign built on two-way communication between the campaign and supporters, and between supporters and voters. Beyond using paid television and mail, the Engagement Campaign program focuses on maximizing the most valuable, inspiring and cost effective form of communication – word of mouth. Online communications also become an important medium for building your narrative and engaging supporters in real conversation via email, blogs and other channels, which also affect the public conversation about your candidate.

In the field, practitioners of the Engagement Campaign mobilize core supporters around an aspirational narrative by challenging them to take on significant responsibility for the change we seek together, providing them with the tools, skills and support to fulfill their responsibility and holding them accountable for meeting goals. Technology and data form the foundation for field organizing and decision-making, making field operations more targeted and effective, motivating supporters and staff to keep fighting.

When highly motivated, core supporters also play a significant role in raising money for your campaign. These supporters organize their social networks by emphasizing the stakes of the campaign. This influences others to get involved and donate money, creating a legitimate grassroots campaign. A thoughtful and disciplined strategy that drives the campaign narrative in this way can create new revenue. As the number of core supporters increases, so should the money in your campaign coffers.

Motivating your campaign—from your staff to supporters and voters is a core function of your work as manager.

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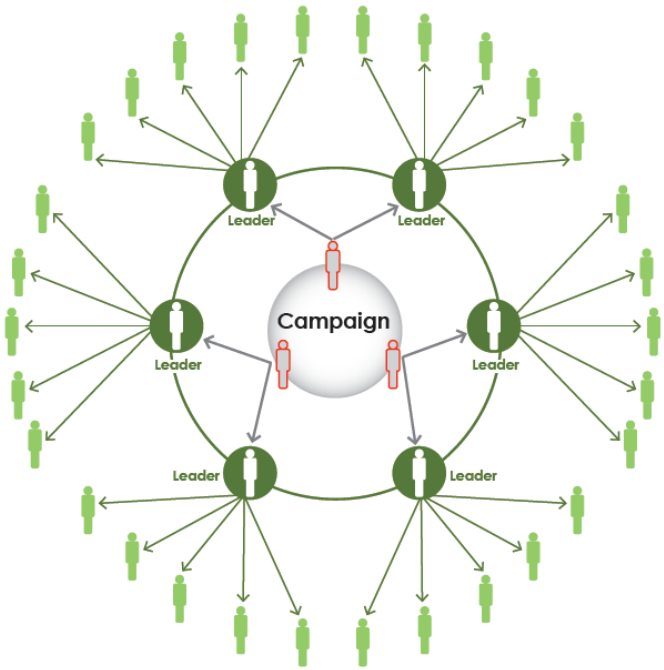
STRATEGIC ENGAGEMENT OF PEOPLE

Leadership starts with you. Good campaign managers are good leaders. They use their leadership skills to build a strong team, to develop and execute a strategy, and to alter the strategy as the campaign progresses. They also generate a culture among their staff and consultants that strives for excellence and success. Just as bad leadership can run a campaign into the ground, outstanding leadership can be a vital strategic advantage.

Create structures for developing and absorbing leadership

Leadership is the human currency of your campaign. An Engagement Campaign asks more of everyone in the campaign, from staff to volunteers, creating clear leadership ladders and opportunities to take on more responsibility and leadership of others. The more responsibility you and your staff have delegated to others the more your campaign can spread out, generating increasing human and financial capital for the campaign.

But leadership doesn't just appear out of nowhere. Engagement Campaign Managers are intentional about creating structures and support that enables others to take on responsibility. To create greater engagement, the campaign is structured into teams where responsibility and capacity for action is distributed across more people. Those teams are held responsible for consequential—rather than just tactical—outcomes. Rather than assigning discreet activities to volunteers, such as "will you come phone bank on Tuesday evening?" Engagement organizers assign measurable objectives: "will you be responsible for identifying and turning out 382 voters in your precinct on election day?" Or "will you be responsible for raising $5000?"



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With a clear intentional structure, Engagement Campaigns can ask volunteers to take on tasks that traditional campaigns may have only entrusted to paid staff. For example on smaller campaigns that can't afford a full time New Media director, a team of trained volunteers may be the blogger, social media networker, and digital photo editor for the campaign, allowing the campaign manager or deputy manager to take on higher-level new media strategy and focus on the integration of the field, finance, and communications pieces of the work.

Invest in training and coaching

Strong managers recognize that excellence requires practice and coaching. Trusting others with leadership and responsibility means investing time and effort in ongoing training and coaching, creating a culture of learning from mistakes and commitment to achieving excellence over time.

Be data driven, transparent, and accountable

In a culture of learning, anything important should be measured and tracked. Core measures of success need to be tracked as well as key tactics, so that if goals are not met, your staff and volunteers can understand why and adjust the program accordingly.

Each phase has specific, measurable goals that the entire team is responsible for reaching, so it makes sense to make the goal and progress to meeting the goal transparent for all to see.

	Building the Foundation	Engaging Supporters	Engaging Voters	Winning	ELECTION DAY
MONEY RAISED	$150,000	$400,000	$1 Million	$1.5 Million	**$1.8 Million**
TARGET VOTER ID'S	500 IDs	5,000 IDs	60,000 IDs	85,000 IDs	**90,000 IDs**
VOLUNTEER LEADERS	3 Volunteer Leaders	30 Volunteer Leaders	40 Volunteer Leaders	45 Volunteer Leaders	**50 Volunteer Leaders**
VOLUNTEERS	15 Volunteers	150 Volunteers	200 Volunteers	250 Volunteers	**300 Volunteers**
ONLINE SIGNUPS	500 Signups	5,000 Signups	20,000 Signups	30,000 Signups	**30,000 Signups**

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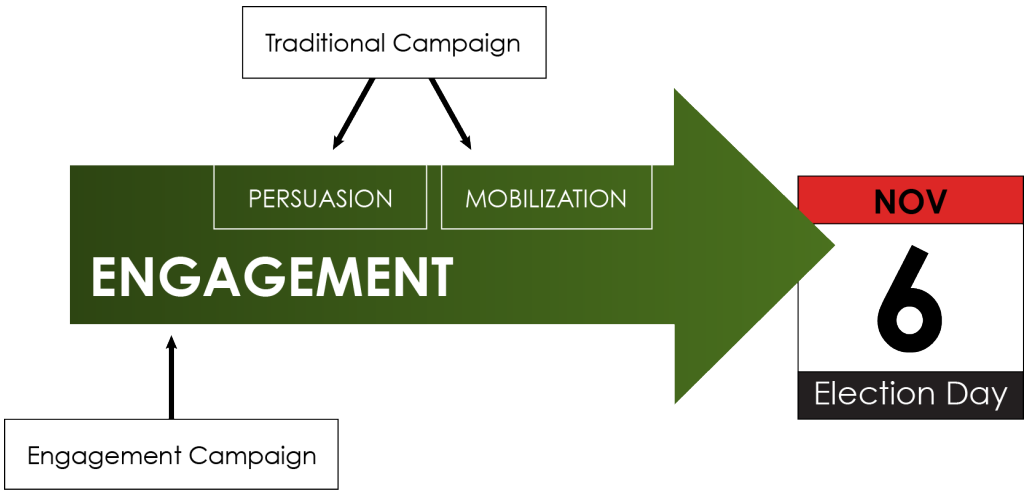
STRATEGIC USE OF TIME

Get people involved early

Many campaigns wait until the traditional persuasion phase of the campaign (6-8 weeks before Election Day) to get volunteers involved. But because of the critical role of supporters and volunteers, the Engagement Campaign begins involving volunteers as early as possible in the campaign, focusing exclusively on engaging, motivating and training supporters in the early phases who can deliver the work it will take to win in later phases.

Just like early money is the yeast that helps the fundraising dough rise, getting supporters engaged as early as possible ensures maximum growth for your organization. In addition to getting more people involved, the early start allows for training and early trial and error so staff and volunteers can learn and improve over time without jeopardizing the outcome of the election. This period of trial and error early on helps create an authentic campaign culture, where staff and volunteers are committed to learning and improving together.

For some campaigns an early start presents a budgetary challenge, since field staff cannot be hired on Day One. But the Engagement Campaign creates a culture of giving volunteers responsibility for part of everything they do early in the campaign, from managing the office to taking on fundraising goals to recruiting supporters in their own neighborhoods.



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Set clear phases and milestones to drive productivity

We have broken the planning process for an Engagement Campaign into four phases: 1) Building a Foundation, 2) Engaging Supporters, 3) Engaging Voters, and 4) Winning the Election. The length of these phases will differ for every campaign, and in the day to day work they will bleed together. However, having clarity about the phases of your campaign will allow you to articulate a narrative arc to the work, so that you can create purpose and urgency much earlier than other campaigns might.

The first phase, "Building the Foundation," is the period when you will set up basic administrative, finance and management systems, build your leadership team, and develop the campaign narrative and strategy.

The second phase, "Engaging Supporters," is a period when you will pay particular attention to building and developing your human capital to bring more resources to your campaign. This is counterintuitive to many managers, because during this phase productivity (particularly on voter contact) may be low. However, if supporters are intentionally and measurably recruited and cultivated early on, they can deliver exponential growth in campaign activity later, when it matters most in the campaign.

The third phase, "Engaging Voters," is traditionally known as the persuasion phase of the campaign. The focus in this phase is on identifying supporters and persuading undecided voters. Coordinating your message across multiple channels – paid media, earned media, new media, person-to-person contact, and paid direct communication (like mail and phone) –allows your campaign to break through to your targeted voters.

The final phase we've called "Winning the Election," not because you're guaranteed to win, but because this phase is focused on the ultimate goal—turning out votes for your candidate to win on Election Day. You may continue to engage voters and persuade during this period, but you will also be focused on getting your voters to the polls (or the mailbox) in a systematic way to ensure victory.

Each phase requires measurable goals for money, message and mobilization, and a plan for managing the program and staff to meet those goals. Each phase begins with assessment and training so that the team understands the goals and their responsibility for reaching the goals, and has the skills necessary for reaching the goals. Every phase is punctuated with a strategic milestone that tests or demonstrates the people and money capacity built in that phase. The milestones help to create urgency – especially critical in the early stages of the campaign when the election seems to voters to be so far away.

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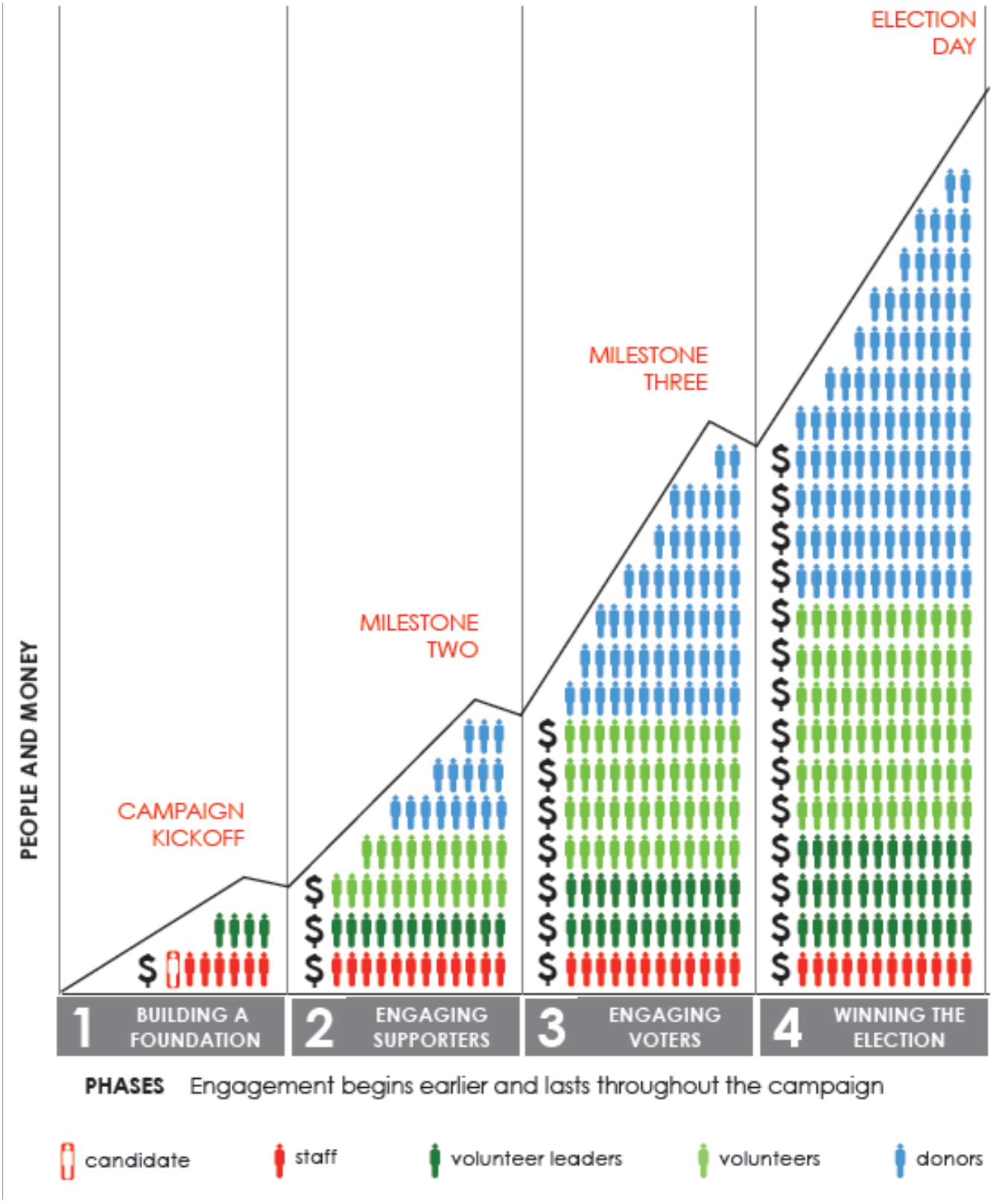
PEOPLE AND MONEY
CAMPAIGN KICKOFF
MILESTONE TWO
MILESTONE THREE
ELECTION DAY
1 BUILDING A FOUNDATION
2 ENGAGING SUPPORTERS
3 ENGAGING VOTERS
4 WINNING THE ELECTION
PHASES Engagement begins earlier and lasts throughout the campaign
candidate
staff
volunteer leaders
volunteers
donors

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DISCIPLINED INTEGRATION

Run one campaign

It is very easy for campaigns to develop silos that end up pulling the candidate, manager and staff in different directions. In a strong campaign all functional areas of the campaign – fundraising, communications, field, new media, political and operations – need to understand the campaign strategy and contribute to meeting money, message and mobilization goals together. All participants – staff and volunteers—need to understand the goals and their specific role in meeting them.

The campaign narrative needs to be communicated in tandem across all departments to maximize impact: the communications staff, field staff, and finance staff need to reinforce each other, communicating the same narrative all of the time.

Balance discipline with opportunism

A solid Engagement Campaign stays focused on the basics—building an organization that is raising money, driving the message and mobilizing supporters and volunteers. A focused campaign carries out the hard, rigorous work of delivering those basics, which requires discipline from top to bottom and an ability to withstand the daily and weekly turning of the media tides.

A strong campaign that is disciplined and focused on its core outcomes can take advantage of opportunistic media moments to push more money and people to the campaign. New media plays a particularly critical role in those moments, allowing your campaign to take advantage of unexpected peaks.

Remember, though, these moments will only pay off if your campaign has built a solid foundation first—the organization, focus and discipline it takes to absorb big waves of people and money down the road.

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WHAT ARE THE BENEFITS OF AN ENGAGEMENT CAMPAIGN?

More resources for your campaign – people and money

By combining an aspirational narrative with a plan to organize core supporters to tap their social networks online and offline, you can recruit more people and money to your campaign. Starting early gives the candidate and organization time to build relationships and train volunteer leaders that will create additional capacity for you to produce more people and money to win on Election Day.

Tapping the most effective method of communication – word of mouth, amplified by new media

The rise of new media has altered how people use traditional media and advertising as sources of information and ideas. Research shows that Americans are nearly twice as likely now to trust the recommendation of family or friends over advertisements or editorial content. Word-of-mouth – which has always been the best form of communication – is more important than ever in an increasingly fragmented media environment, as people turn to their own social circles for ideas and information.

Some 74% of internet users--representing 55% of the entire adult population--went online in 2008 to get involved in the political process or to get news and information about the election.[1] This cycle we can expect even higher rates on online engagement. New technology enables campaigns to drive word of mouth communications. Of course that does not mean campaigns should abandon earned media and advertising, but rather that interactive media and technology-driven grassroots outreach are now a vital part of a campaign's media mix.

More stability & flexibility to navigate unexpected challenges

Two important measures of the Engagement Campaign are the number of people who feel a sense of ownership over the campaign, and the overall organizational capacity, meaning the people who are actually working in organized teams to accomplish important goals together. These factors help create a stable base to deal with the inevitable rough patches of a campaign, especially if the paid media message tides turn against you. Supporters want to respond when there's a challenge and can become your most effective means for pushing back on negative, misleading attacks.

[1] PEW STUDY: The Internet's Role in Campaign 2008 by Aaron Smith, Apr 15, 2009

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HOW DO I LEAD AN ENGAGEMENT CAMPAIGN?

Your number one job is facilitating strategizing

You are responsible for engaging others in ongoing strategizing about how best to win your campaign. No two candidates or campaigns are alike, so your job is to develop a strategy unique to your candidate, the mood of the electorate and the times.

You're also responsible for continually interpreting the campaign strategy for staff and supporters so that they are motivated to continue striving for the excellence it will take to win.

Creating Strategy

Marshall Ganz, a long-time organizer and teacher of organizing says strategy is simply using what you have (resources) to get what you need (organization) to win. Strategy is not something you do once—it's a living ongoing process of turning resources into organization during your whole campaign.

This is a standard strategic planning cycle used by leadership in many types of organizations, and the outline of this manual follows this process. It requires clear ongoing assessment and deployment of resources to build organization and action to win:

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Step 1: Assess

Examine your strengths, weaknesses, opportunities and threats as a campaign—what you have, where you are toward reaching your goals, where things are operating at full speed and where your campaign is struggling.

Step 2: Set Goals

Set major milestone dates in each phase with campaign goals (like amount of money raised, or number of supporters identified) attached to each milestone. Set mini-milestones within each phase as a way to build momentum and measure progress to goals. How will you test your organizational capacity across all staff and volunteers at key points? What will the dates of your major milestones look like and feel like? As much as possible your milestone dates and goals should be consistent across all departments on your campaign to create synergy and momentum.

Step 3: Develop Strategy

Given your assessment of resources, what strategy or program will help you use your resources most creatively to meet your goals? Where should you focus and when? What materials need to be created to carry out this program? (Ads? Lit? Sample Scripts? Trainings?) How will that get done?

Step 4: Lead and Manage the Program

Delegate the goals and program activities clearly according to staff, consultant and volunteer roles and responsibilities.

Establish training and coaching practices. What are the skills necessary for executing the program? How and when will staff and volunteers learn and practice the skills necessary for the program? How will you re-train those who are struggling? How will you measure and hold staff accountable on coaching time spent with junior staff and volunteer leaders?

Prioritize reporting, accountability and learning. What will staff and volunteers report? How? How often? How will you identify people who are struggling? What is your daily and weekly strategy to share early success with team members and surface problems?

Step 5: Evaluate and Adjust

What will you measure to make sure you are on track? How will data be captured, stored, and analyzed? What feedback loops will you create to incorporate team learning and reflection so that best practices are understood and shared so your team gets closer to winning over time? How regularly will your team meet to review results and analyze data? How will you communicate with team members about changes to the program?

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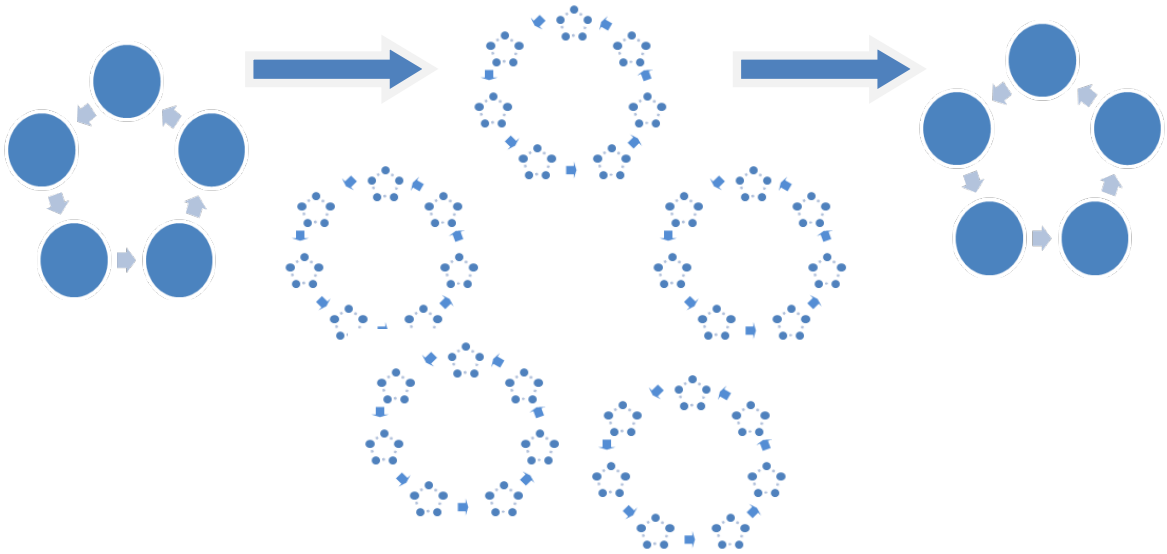
Strategizing is Dynamic and Ongoing

Planning any campaign is not a one-time linear process. Problems will arise that you never could have foreseen that will require creative, resourceful, continuous strategizing.
The planning cycle laid out in this manual is fractal-like: it needs to be replicated each day (with brief morning and evening check-ins), each week (with a staff leadership meeting), and each phase (with a staff/leadership retreat) in a deliberate and ongoing way.



That requires structuring in time and processes for regular evaluation and adaptation, and for campaign-wide strategizing before each new phase.

Ongoing strategizing on a daily weekly and phase-by-phase basis gives you a chance to evaluate the real performance and progress of your team and use that knowledge to prepare for what's ahead based on an accurate assessment of where you actually are. It also helps create new urgency, a sense that you are shifting gears, stepping it up and expecting more of people in each new phase.

Engagement Campaign Strategy Chart

On the next page you'll find the chart we'll use in every chapter to walk you through developing your campaign strategy.

This chart is set up like a budget, because it is a map for how you will generate and expend human and financial resources strategically across time and across major departments in a disciplined and integrated way.

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ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy				
Message Strategy				
Mobilization Strategy				
Management Strategy				

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USING THIS MANUAL

Using the principles described in this chapter, the rest of the manual will move through your responsibilities as manager and illustrate how to plan and manage a strategic, competitive Engagement Campaign.

This manual is structured around steps in a planning process rather than by department. This format is deliberate. Successful campaign managers integrate departments in a common purpose with shared goals and shared strategy over the course of the campaign.

Chapter 2: Getting Started

During the first few weeks, you may be the only staff person on the campaign, and may struggle just to manage all the scheduling and incoming tasks. Chapter 2 provides you a focusing checklist to help you build your team and prioritize early infrastructure-building activities that, if properly carried out, will save you time and generate more resources for your campaign.

Chapter 3: Assessing the Landscape

No two campaigns are the same—even for the same candidate in different years. Developing a creative, resourceful strategy requires a solid assessment of what's unique to your candidate, campaign, region and cycle. Assessment includes an overview of the landscape and research, and development of a campaign timeline.

Chapter 4: Crafting Your Narrative

A clear and compelling aspirational narrative is critical to winning an Engagement Campaign. Your narrative needs to motivate supporters to become actively engaged, and attract voters who share your candidate's values and hope for the future. The campaign narrative is the rationale for the candidacy; it will be incorporated in every other aspect of the campaign. The key is to use the candidate's story and research as your guide.

Chapter 5: Setting Goals

In order to create urgency, delegate work and get traction over time, you need to set very clear goals for your campaign. These include vote goals, money goals and volunteer goals. This chapter covers the basics of setting goals for your campaign team.

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Chapter 6: Developing Your Strategy

The strongest campaigns are those that creatively and intentionally use the resources they have to generate new resources in order to win the campaign. This chapter covers the basics of creating a strategy for raising money, driving your message, and building your mobilization capacity to win.

Chapter 7: Leading and Managing

For strategy to come alive, it requires strong management of your *work* with good role setting and delegation, strong management of your *people* with good training, coaching and accountability, and strong management of *time* with strategic scheduling and disciplined meetings.

Conclusion

Challenges and opportunities will surface on a daily basis that you can't predict now. Good strategizing requires that you have solid data and management systems in place to help you continually evaluate the effectiveness of your programs, and adapt your strategy as you go.

Additional Tools

Throughout the manual, you will find visual aids to explain concepts, and worksheets and templates that can be used by you or your staff and volunteers. As you develop new tools and templates please share them with us, so that we can include them in future editions of this manual to help others along the way.

Good luck!

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Chapter 2

GETTING STARTED

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CHAPTER 2
GETTING STARTED

INTRODUCTION

When the campaign first begins, you'll probably feel like you're drinking from a fire hose. Information is flying at you fast. Decisions feel important and immediate. You feel like every aspect of the campaign has to be addressed NOW.

Take a deep breath and remember the campaign is a marathon, not a sprint. To begin, just focus on managing these priorities:

- ✓ Creating a deliberate culture
- ✓ Creating basic administrative processes
- ✓ Establishing a basic early budget and fundraising process that is meeting goals
- ✓ Establishing an initial presence online
- ✓ Setting up structures for recruiting and absorbing volunteers
- ✓ Hiring staff and consultants

This chapter provides a basic guide to help you manage these priorities, collect early resources that come your way, and keep you out of trouble later.

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CREATING A DELIBERATE CULTURE

Every campaign has a culture

Every campaign has a culture—the way staff and volunteers engage with each other and with your opponent and their staff. The challenge is taking the time and creating the space to develop that culture deliberately with your candidate and staff.

Take a few minutes early in the campaign to think through when and how you will engage your new team in conversation around the values they share that brought them to the campaign, and the values and experiences that inform the way they want to work together. One way to do this is to have a meeting very early on explicitly for that purpose, where your team gets to know each other's stories and spends time articulating a few key principles they agree to live by. For example, on the Obama campaign in 2008 the mantra "Respect. Empower. Include." developed by Paul Tewes and his staff in Iowa became the guiding principles of the campaign.

Discuss together, how will staff treat each other? How will they treat the candidate and vice versa? How will you all treat your opponent and their staff when you see them or engage with them?

It's important that you have a team conversation to create agreements or norms that the team feels responsibility for generating and to which they can then be held accountable.

Create a culture of accountability, not rules

Every campaign has a few core rules for staff. However, it will be impossible for you to create enough rules to manage all of the people you need to engage in your campaign to win. Think about how to create a culture where staff and volunteers are trained to hold each other accountable to achieving performance outcomes, but also to hold each other accountable to the values that bring them together. What training or role playing would that sort of accountability require? Creating this culture early on through role playing and coaching can minimize drama down the road when difficult situations arise.

Create a culture of excellence

Strong campaigns are those where staff and volunteers are committed not just to the candidate, but also to each other in a common purpose to win. A culture of excellence isn't one that demands instantaneous excellence, or one that threatens to publicly humiliate poor performance for the sake of exercising power.

A culture of excellence is one built on transparency of goals and progress to goals, where staff and volunteers have ownership over and responsibility for key outcomes. With clarity of goals and feedback loops on progress to those goals, your team will lean in, drive themselves and strive for more.

That culture is not possible in a campaign based on fear of embarrassment or fear to admit failure. It only thrives in a context where you as the Manager have created daily and weekly opportunities to evaluate outcomes together, to understand who's doing well and why, who's struggling and why, to help each other problem solve, and to recommit to striving for excellence together.

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It's the difference between having everyone get on a conference call just to report numbers, and having them report transparently so everyone can see in a Google spreadsheet or other online format, then using the call to analyze the outcomes on that spreadsheet together.

Create a culture of learning

Your entire team—candidate, consultants, staff and volunteers will not know at the beginning of the campaign what they'll need to know at the end. Whatever past experience they've had on campaigns is useful information, but this campaign is new, will face new opportunities and new challenges, and it will only be weathered with a strong commitment to learning and improving over time.

How will you get coached? By whom? How will you set up clear coaching structures across your campaign? How will you reward learning and improvement over time?

Prepare yourself not to complain about your staff, but to ask "if they're failing, what have I done wrong?" And "What support or conditions would change their outcomes?"

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DEVELOPING TRUST WITH YOUR CANDIDATE

Getting started can feel overwhelming. You're building the plane as it's taking off. In the middle of that flurry of activity, it is easy for a critical part of any campaign to be overlooked—the development of trust between campaign manager and candidate.

You have to manage a lot: staff, consultants, a kitchen cabinet, a budget, and so on. Sometimes the hardest thing to manage is the relationship with your candidate. It's their campaign, but you're running it. You're telling them what to do, but they've hired you. There is no simple way to produce a productive and positive manager-candidate relationship, but below are a few guide posts.

Create a culture of accountability

Managers and candidates need to mutually hold each other accountable. Has the candidate met their call time pledge goal for the week? Is the campaign meeting its field goals? Set up a system of regular scheduled check-ins so that both you and your candidate are on the same page, communicating on a regular basis.

Know what your candidate needs to know

They probably need to see your TV ad before it goes up, but they might not need to know about every line item in your budget. Have a frank discussion about what they want to know and when. Set up decision making processes for reviewing paid communications, polls and anything else on which they need to give input.

Know your candidate's inner circle

Whom do they trust? Which friends communicate with them regularly about the campaign? Which consultants does your candidate trust? Sit down with these folks early on, and develop relationships. Hear their vision for the campaign, and tell them where it's going. That way, when you need someone to advocate for something you want your candidate to do, you don't always have to be the person making the ask.

Realize this early on- it's not *your* campaign

You should respect that your candidate has done something meaningful enough in his or her life that they're running for office. Their name is on the ballot. At the end of the day, no matter how strongly you feel about a particular major decision, it's their campaign.

Pick your battles

You and your candidate will have disagreements. This is a given. Figure out what's really important to you, make the case, get your candidate's inner circle on your side, and fight for it. If you have to write a policy paper just to get more call time hours in the week, that's what you have to do.

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CREATING BASIC ADMINISTRATIVE SYSTEMS

Get some help

This is an Engagement Campaign, so there's no better time than now to start engaging. Find a full-time volunteer assistant or set up a schedule for part-time volunteer office assistants. Political science majors at your local college are great candidates. Even if you are the only paid staffer, there are tasks you must immediately delegate, like answering the phone, gathering news clips and greeting walk-in traffic.

Decide some basic roles

Decide who will be the campaign attorney and treasurer, then run the legal papers by them before you file. The attorney should be a close friend or associate of the candidate who will be accessible throughout the course of the race, and has some experience with the laws governing the kind of race you're running (federal vs. state vs. local).

Hire either an accountant or a professional service to handle the payroll and other campaign tax issues.

Get official

- ☐ File a statement of organization with the appropriate election division depending on the level of your race (Federal Election Commission, Secretary of State, etc.).
- ☐ Open a campaign checking account.
- ☐ Get a post office box.
- ☐ Get a telephone number. The telephone number should not be the candidate's or your own personal mobile phone number.
- ☐ Get an office. The office should not be in the candidate's home.
- ☐ Take inventory of whatever resources you have access to - computers, desks, printers, office supplies, and copiers.
- ☐ Create a form explaining the laws governing in-kind contributions for your race and asking for the donor information needed for those who make in-kind contributions.
- ☐ Make a list of the office furniture, equipment and supplies that you will need (computers, desks, printers, office supplies, copiers) and start soliciting those in-kind contributions.
- ☐ Make a short list of the essential early needs of the campaign that you can't get through in-kind donations. BE CONSERVATIVE! Money spent now is money you won't have at the end of the race to run that last TV ad.

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Create order

Set up administrative systems that will control the inevitable chaos of the campaign. These systems will organize the important information arriving into the campaign and give you a process to decide which resources leave the campaign.

Finance:
Decide what finance database the campaign will use to track potential donors, pledges, and contributions and to create the finance reports. If you have no money, that means starting with simple spreadsheets. In the short term, at least be sure every check received by the campaign is photocopied (with any materials that arrive with it) and filed by the date received. Save and file all bank information, including copies of deposit slips and bank receipts.

Communications:
Decide with your candidate what the approval process will be for all of the text on the website, press releases, and other external communications materials. Who makes the final sign-off? Who is allowed to speak to the press? Who is not?

Scheduling:
How are scheduling requests received? How will you and the candidate coordinate the candidate's schedule before decisions and promises are made? How will scheduling requests be politely declined or deferred? If the candidate has scheduling staff in another government office, company, or organization what role does that scheduler play in coordination with campaign staff? What are the ground rules around changing campaign time, especially call time? Important campaign time like call time should not be subject to change by people outside the campaign.

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STARTING YOUR BUDGET

Your budget will be a living document—a written, detailed roadmap of your campaign strategy that you live by and revise every day. It reflects the campaign's priorities and your beliefs about where investing your money will get the greatest return. A budget from another campaign (or the candidate's previous race) will NOT suffice for your campaign. Before you spend anything, you need a basic budget that you can flesh out later in more detail.

There is no magic formula for creating a budget, and there is certainly no budget fairy who will do this for you. This is one of your major jobs as Campaign Manager, so put aside any money anxieties you may have and focus on investing the time it will take to create your budget. Schedule a regular time right now in your daily and weekly agenda to review and revise your budget.

Set an overall budget number. How much will it cost to win?

Start with some research. How much did the last campaign cost for this candidate or in this district? Depending on the type of race (local, state or federal), you can find this out from the FEC or your from your state. Based on an assessment of your strengths and weaknesses as a campaign how will that number change? For example, do you expect to need to spend more money this cycle fighting online rumors, or more money hiring field organizers to turn out your base?

Create both an ideal (high) version and a minimum (low) version of your budget. Get estimates from consultants for the big chunks of your budget, like paid media, online support, research, and field. Ask for one set of quotes that covers everything you could need in a race like this—your Cadillac budget. Ask for another set of quotes that covers the basics of what you'd have to have in order to win—your motorcycle budget.

Choose a budget number in between those two—one that challenges you to do more, but that is also realistic.

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Build out your budget in chunks with the biggest items first

Write your budget in a spreadsheet and organize it into categories by department in rows down the side, with the timeline across columns at the top (by month at first, later broken down by week). Check out the templates at the end of this chapter as a starting place.

1. **Paid communications**

   Ask media consultants for a quote that covers all your paid media, including TV ads, online ads, radio, direct mail, etc. Don't be shy about asking questions and really understanding this quote.

2. **Research**

   Add your research costs, including polling and outside research assistance.

3. **Fundraising**

   Bring in Finance Assistants if possible. Estimate event costs.

4. **Field**

   Bring in good Organizers as early as possible to recruit and develop strong volunteers, rather than only paying for direct voter contact at the end. Add in costs for materials, like literature, buying voter file lists, and GOTV.

5. **Online**

   Add up your site hosting and development costs. If your campaign is large enough, bring in a New Media Director to help generate money, support and coverage online.

6. **Administration**

   Consider overhead costs, like offices, phones, materials and database fees.

Step back and evaluate

No two campaigns are the same, and the biggest difference in budget will be determined by how the campaign will communicate with voters using paid media. This is largely a function of how expensive the media markets are in your area.

Check your budget to see if it strikes roughly the right balance. This is a sample budget for a congressional race. Local races would be much heavier on field and much lighter on paid media:

Paid Media	60-70%
Research	7-9%
Fundraising	8-10%
Field	7-9 %
Online	4-6%
Administration	4-6%

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Lay your budget out on a clear timeline

Start with Election Day and work backwards. The most important money is what you will spend to communicate with voters in the final weeks and days leading up to Election Day. Plug in your media buys first, then work backwards day by day and week by week from there.

Think carefully about when you will hire people to get the biggest return on your investment. A Finance Director or Finance Assistant hired early should generate much more for your campaign. In Field, investing in a stipend for a couple of solid, well-trained, well-supervised Organizers who start recruiting and developing volunteers early is probably worth more than spending a pile of money just before Election Day on paid canvassers who will not be as invested in your campaign.

Sketch out the cash flow. When do you need to have money in hand, in order to pay expenses? The US Postal Service doesn't operate on credit, so if you need to send a big mailing, the money needs to be there well in advance.

Flesh out the details

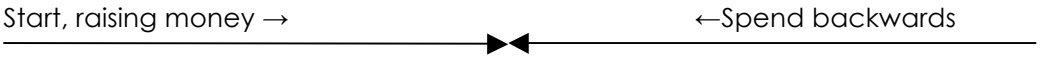
There should be no row on your budget called "miscellaneous." You need to guard this budget as if it were your own personal money and think twice—or three times—before you spend. Use as many rows as necessary in your budget to be clear with yourself, your candidate and your staff about what money can be spent, when, and for what.

Ask for help

Ask others for help—your party committee, EMILY's List, Progressive Majority, or similar campaign organizations, your consultants, and past campaign managers. You are ultimately responsible for the decisions made about the budget, but you can't make good decisions without good critical advice.

Stick to your Budget!

The first money you raise should be put in reserve as the last money you'll spend on Election Day. Continue raising and saving that way until you come to the day that your reserves meet your projected costs for the remainder of the campaign.



When you reach that day, you can start to spend down to zero every day from there forward (probably adding to your media buy or field staff) because every expense in the future has already been accounted for (media, utility, payroll, etc.).

Do not plan to end with a deficit. The goal is to end as near zero as possible, with more votes and no regrets. In the end game, it's all about generating and managing the cash flow.

Get used to saying no. The amount of money raised in an electoral campaign is more than most people ever see in one place. Naturally that means others will make constant requests for things that cost money because they see money coming in.

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Learn to say no early, but also explain why you're saying no—why saving for GOTV and Election Day is so important. Staff and key volunteer leaders need to be able to communicate why the campaign is making the decisions it is. If they understand your decisions clearly, your best donors and volunteers will respect a frugal, resourceful campaign that uses their time and money well.

Think before you spend. The best campaigns have a culture of creative resourcefulness from top to bottom and it starts with you.

Daily Practice: Check your budget, reconcile differences, check, reconcile, rinse, repeat

Keeping your budget a living document means making sure what's in your document matches what's in your bank account. If you've budgeted effectively, the actual cost of your yard signs should be less than or equal to what you actually pay. But if you forgot the cost for shipping, that has to be accounted for somewhere. If you're over budget, then you can either increase your fundraising goals to make up for it (not generally advisable) or cut the cost of something else in your budget. Either way, it has to come from somewhere.

Conversely, if you're under budget, great! You should have a mental list of things that would be "nice to have." It may mean increasing the number of people you're sending a piece of mail to by 1,000 voters. It may mean increasing your TV buys or hiring an extra organizer. Whatever it is, you should know exactly where unexpected money would go.

Schedule a time of the day or week when you measure your projected costs against actual costs. Check if your fundraising goal has been met. Make sure what's in your bank account, budget spreadsheet and finance database match. If there are discrepancies, change your budget accordingly.

If you're truly living your budget, you'll know the answers to 3 questions off the top of your head:

1. What's the current cash on hand? Today? At the end of the quarter?
2. How much is there left to spend?
3. How much more do we have to raise? This week? By the end of the quarter?

Ask yourself those questions consistently. If you don't know the answers, find them out.

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Sample Budget Categories (very simplified):

Communications-PAID
- Consultants
- Direct Mail
- Television/Radio Production
- Television Time
- Radio Time
- Website
- Online advertising

Communications-EARNED
- Communications staff
- Photos of the Candidate
- Digital Camera
- Website hosting

Research
- Baseline Poll
- Self and Opposition Research
- Focus Groups
- Tracking Poll

Fundraising
- Fundraising Staff
- Business Reply Envelopes
- Direct Mail
- Events
- Postage
- Printing

Field
- Field Staff
- Election Day/GOTV Expenses
- Materials
- Volunteer expenses
- Voter Lists
- Yard Signs

Administration
- Campaign Manager
- Operations Staff
- Furniture
- Insurance
- Internet
- Letterhead
- Office Equipment– computers, copiers
- Office Supplies
- Postage
- Rent
- All Payroll Taxes
- Travel and mileage
- Utilities

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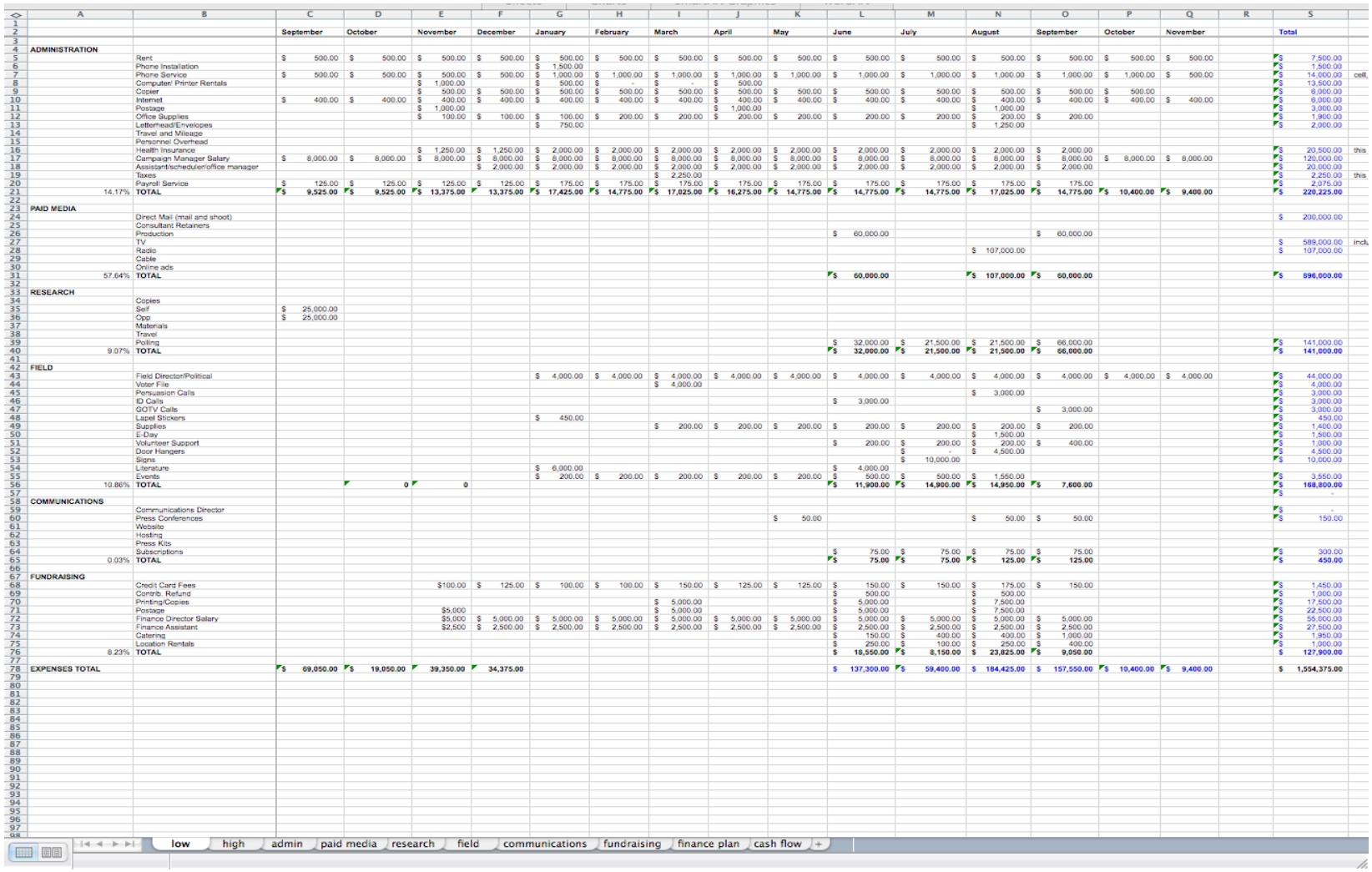
Here is what the top page of a budget document might look like:



		September	October	November	December	January	February	March	April	May	June	July	August	September	October	November		Total	
ADMINISTRATION																			
	Rent	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00		$ 7,500.00	
	Phone Installation					$ 1,500.00												$ 1,500.00	
	Phone Service	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 1,000.00	$ 500.00		$ 14,000.00	cell,
	Computer/ Printer Rentals			$ 1,000.00		$ 500.00	$ -	$ -	$ 500.00									$ 13,500.00	
	Copier			$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00	$ 500.00			$ 6,000.00	
	Internet	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00	$ 400.00		$ 6,000.00	
	Postage			$ 1,000.00					$ 1,000.00				$ 1,000.00					$ 3,000.00	
	Office Supplies			$ 100.00	$ 100.00	$ 100.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00				$ 1,900.00	
	Letterhead/Envelopes					$ 750.00							$ 1,250.00					$ 2,000.00	
	Travel and Mileage																		
	Personnel Overhead																		
	Health Insurance			$ 1,250.00	$ 1,250.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00				$ 20,500.00	this
	Campaign Manager Salary	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00	$ 8,000.00		$ 120,000.00	
	Assistant/scheduler/office manager				$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00	$ 2,000.00				$ 20,000.00	
	Taxes							$ 2,250.00										$ 2,250.00	this
	Payroll Service	$ 125.00	$ 125.00	$ 125.00	$ 125.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00	$ 175.00				$ 2,075.00	
14.17%	**TOTAL**	**$ 9,525.00**	**$ 9,525.00**	**$ 13,375.00**	**$ 13,375.00**	**$ 17,425.00**	**$ 14,775.00**	**$ 17,025.00**	**$ 16,275.00**	**$ 14,775.00**	**$ 14,775.00**	**$ 14,775.00**	**$ 17,025.00**	**$ 14,775.00**	**$ 10,400.00**	**$ 9,400.00**		**$ 220,225.00**	
PAID MEDIA																			
	Direct Mail (mail and shoot)																	$ 200,000.00	
	Consultant Retainers																		
	Production										$ 60,000.00			$ 60,000.00					
	TV																	$ 589,000.00	incl.
	Radio												$ 197,000.00					$ 197,000.00	
	Cable																		
	Online ads																		
57.64%	**TOTAL**										**$ 60,000.00**		**$ 197,000.00**	**$ 60,000.00**				**$ 896,000.00**	
RESEARCH																			
	Copies																		
	Self	$ 25,000.00																	
	Opp	$ 25,000.00																	
	Materials																		
	Travel																		
	Polling										$ 32,000.00	$ 21,500.00	$ 21,500.00	$ 66,000.00				$ 141,000.00	
9.07%	**TOTAL**										**$ 32,000.00**	**$ 21,500.00**	**$ 21,500.00**	**$ 66,000.00**				**$ 141,000.00**	
FIELD																			
	Field Director/Political					$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00	$ 4,000.00		$ 44,000.00	
	Voter File							$ 4,000.00										$ 4,000.00	
	Persuasion Calls												$ 3,000.00					$ 3,000.00	
	ID Calls										$ 3,000.00							$ 3,000.00	
	GOTV Calls													$ 3,000.00				$ 3,000.00	
	Lapel Stickers					$ 450.00												$ 450.00	
	Supplies							$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00				$ 1,400.00	
	E-Day												$ 1,500.00					$ 1,500.00	
	Volunteer Support										$ 200.00	$ 200.00	$ 200.00	$ 400.00				$ 1,000.00	
	Door Hangers											$ -	$ 4,500.00					$ 4,500.00	
	Signs											$ 10,000.00						$ 10,000.00	
	Literature					$ 6,000.00					$ 4,000.00								
	Events					$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 200.00	$ 500.00	$ 500.00	$ 1,550.00					$ 3,550.00	
10.86%	**TOTAL**		0	0							**$ 11,900.00**	**$ 14,900.00**	**$ 14,950.00**	**$ 7,600.00**				**$ 168,800.00**	
COMMUNICATIONS																			
	Communications Director																		
	Press Conferences									$ 50.00			$ 50.00	$ 50.00				$ 150.00	
	Website																		
	Hosting																		
	Press Kits																		
	Subscriptions										$ 75.00	$ 75.00	$ 75.00	$ 75.00				$ 300.00	
0.03%	**TOTAL**										**$ 75.00**	**$ 75.00**	**$ 125.00**	**$ 125.00**				**$ 450.00**	
FUNDRAISING																			
	Credit Card Fees			$100.00	$ 125.00	$ 100.00	$ 100.00	$ 150.00	$ 125.00	$ 125.00	$ 150.00	$ 150.00	$ 175.00	$ 150.00				$ 1,450.00	
	Contrib. Refund										$ 500.00		$ 500.00					$ 1,000.00	
	Printing/Copies							$ 5,000.00			$ 5,000.00		$ 7,500.00					$ 17,500.00	
	Postage			$5,000				$ 5,000.00			$ 5,000.00		$ 7,500.00					$ 22,500.00	
	Finance Director Salary			$5,000	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00	$ 5,000.00				$ 55,000.00	
	Finance Assistant			$2,500	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00	$ 2,500.00				$ 27,500.00	
	Catering										$ 150.00	$ 400.00	$ 400.00	$ 1,000.00				$ 1,950.00	
	Location Rentals										$ 250.00	$ 100.00	$ 250.00	$ 400.00				$ 1,000.00	
8.23%	**TOTAL**										**$ 18,550.00**	**$ 8,150.00**	**$ 23,825.00**	**$ 9,050.00**				**$ 127,900.00**	
EXPENSES TOTAL		**$ 69,050.00**	**$ 19,050.00**	**$ 39,350.00**	**$ 34,375.00**						**$ 137,300.00**	**$ 59,400.00**	**$ 184,425.00**	**$ 157,550.00**	**$ 10,400.00**	**$ 9,400.00**		**$ 1,554,375.00**	

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Here is what the cash flow part of the budget document might look like:

		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
EXPENSES TOTAL		$59,525	$9,525	$25,975	$21,000	$35,675	$26,575	$43,075	$28,300	$26,850	$77,300
RAISED TOTAL	$150,000					$96,000	$96,000	$183,200	$36,100	$41,100	$87,900
COH	$150,000	$90,475	$80,950	$54,975	$33,975	$94,300	$163,725	$303,850	$311,650	$325,900	$336,500

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STARTING TO FUNDRAISE

Fundraising success is very dependent on creating a disciplined, organized culture and good habits early. If you don't get this right at the beginning, it's hard to get back on track. So even before diving into your campaign plan, take some time to really figure out the systems you'll use to collect money, and GET STARTED!

Find out the boundaries of your fundraising

Externally imposed:

What are the contribution limits for your race?
What information do you legally need to collect from each donor?
For federal races, all of this information is available through the website of the Federal Election Commission (FEC) at http://www.fec.gov/law/feca/feca.pdf
State and local campaigns need to find a similar manual provided by their state or local board of elections.

Internally imposed:

Will you take lobbyist or PAC money?
Will you limit contributions in any other way based on your candidate's principles or message?

Estimate the campaign's overall fundraising goal

Your fundraising goal should match your budget estimate.

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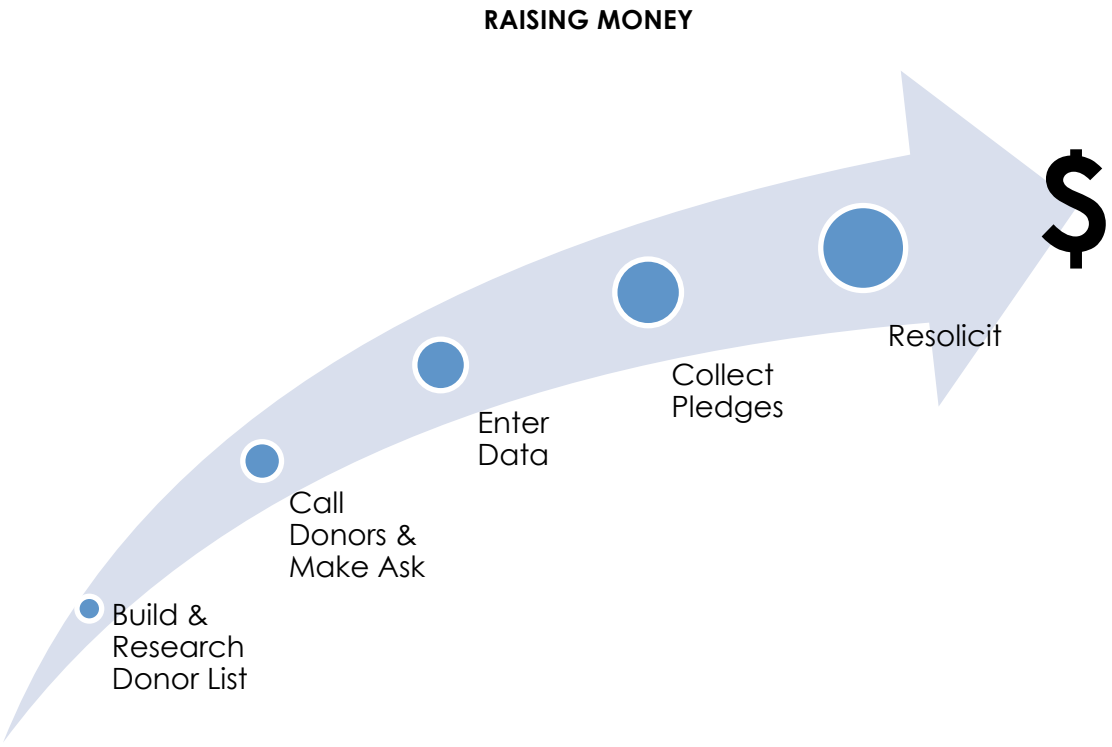
Set up a fundraising system
Here's the basic process for fundraising. Take some time now to figure out each step of the process so that you and your candidate can get into a routine quickly.



Build and research your campaign donor list

Find out if there is a previous donor list and what format it's in. Decide early with your candidate the best way to approach this list.

Create a potential donor list

Go through the candidate's personal "Rolodex" to make a list of other prospects for early donors. Realistically, these will initially be friends, family and close, personal colleagues of the candidate.

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Set up a call sheet format

Work with your candidate to determine what additional information she would like on the call sheet besides name and telephone numbers. Start printing them. Standard fields for NGP or other fundraising databases are laid out on the sample call sheet that follows.

We cannot stress enough to you the importance of creating your own, unique prospect list based on the background, experiences and narrative of your candidate. One experienced Finance Director put it this way: What are the three things that set your candidate apart from other candidates? Figure them out and create lists specific to those characteristics (for example demographic, profession, alma mater, hobbies). Other candidates' contributor lists are unique to them and are never as useful to your campaign as you might think.

Also, it is ILLEGAL to use the FEC and many state contributor lists for your own fundraising purposes. You may use them for research only – perhaps to figure out an ask amount.

Good places to go on the web to do donor research:

- www.fec.gov
- www.fundrace.huffingtonpost.com
- www.opensecrets.com
- www.followthemoney.org
- State or local Board of Elections website

Stay ahead of your candidate

Although the initial prospect list will focus on friends and family, the finance staff needs to continually think ahead and create and acquire more lists for future call time and other fundraising activities.

Do the math to figure out how much staff time you need to stay ahead on donor research: If your candidate can call through a list of 20 donors an hour, and it takes 15 minutes to research each donor and create a solid call sheet, that's five hours of staff research time for every one hour of candidate call time.

Don't wait until your candidate gets through her personal network to start doing the research on other donors!

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Establish Call Time as Sacred Campaign Time

Work with your candidate and any other schedulers she may have to get fundraising time on the calendar as a regular event. Call time should be a priority and other activities should be scheduled around it. Build a long-term call time calendar early. Your whole team, including the candidate, needs to respect that time without interruption.
See sample candidate schedules at the end of this chapter.

Call Time

At the beginning of the campaign, candidates should spend 80% of their campaign time raising money. If they have 20 hours per week to campaign, then 15 hours each week need to be spent fundraising.

Set call time groundrules among you (the manager), finance director and the candidate:

- The candidate should expect all call sheets to be researched thoroughly (call sheets should have a standard and complete set of data about the donor, a suggested ask, accurate phone numbers, etc.).
- The staff should expect call time discipline from each other and from the candidate (hard start and end times for call time, setting and meeting call time goals, making a HARD ask).
- The candidate and manager should expect the Finance Director to provide daily or weekly reports recognizing and celebrating progress with the candidate and staff.

You are responsible for holding your team accountable to the groundrules you set together.

Work with the candidate so that she is asking for a specific contribution amount in the most effective way. **See the sample call time ask at the end of this chapter.**

Prepare Your Data Systems

Decide on a finance database so that once fundraising call time begins (and it will begin today, right?), you can track the results, follow up on pledges, collect contributions, promptly thank donors for investing in your campaign and re-solicit donors for additional contributions.

If there is a prior contributor list, your first task is to import or transfer it to the database you will use for this campaign. Print it in a spreadsheet format so your candidate can use it to make notes for your initial call time.

All of the information from call time needs to go back in the database every day. Set up a system to make sure this happens. Notes from call time and how you got the contributions (call time or event) are important for follow-up and re-solicitation.

Remember that every row in your finance spreadsheet or database is a human being. Keeping your data up to date helps you treat your donors with respect, and makes it easier to give them the personalized attention they deserve.

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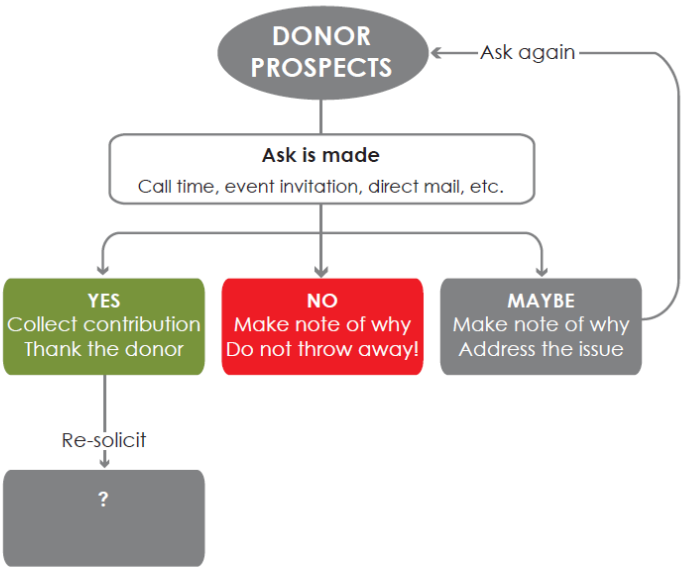

Collect pledges

Be sure your Finance Director or Finance Assistant has a very clear process for how and when to follow up on pledges. It will be easier for donors to say no to this person than to your candidate, so take some time to role play with them a good follow up call to politely remind donors of their pledges.

Get ready to re-solicit

Create a re-solicitation schedule for the early phase of the campaign leading up to the first campaign finance report deadline. Keeping good notes in your database will make it easier to ask again.

Start raising early

Ask the candidate, the candidate's spouse, and close family to donate the maximum amount immediately.

Raising Money Online

Figure out how the campaign will collect online and other credit card contributions. You can apply for and set up a merchant account. You may also use ActBlue, a political committee that enables anyone to fundraise online for the candidates of their choice. Once you file the appropriate paperwork, an ActBlue account will be set up automatically for your campaign. Contributions received into that account are forwarded to the campaign weekly by check with an accompanying list of donors, amounts and pertinent donor information.

Start calling. It is vital that your candidate get to this step as soon as possible. Take a little bit of time to get things set up right, but don't wait too long. The candidate's personal network can be called first and doesn't require as much research. As soon as you have a system to track data, call time should begin.

Keep track of how many calls are made per hour, how many contacts are made per hour, how many pledges you're getting per hour and how much money is raised per hour. This information will help you schedule candidate call time with more accuracy as the campaign progresses. **See the sample tracking sheet at the end of this chapter.**

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Figure out what your candidate needs in order to stay motivated. Does she want to know how much money comes in from call time each week? What other reports does she need?

Start forming a finance committee. In these tough economic times, the new power bases in fundraising are those who can bring new money into the campaign rather than those who can simply max out themselves.

People who are willing to engage their OWN social networks to raise money for the campaign should be a strong focal point for your earliest volunteer fundraising efforts.

Set up a system where each committee member has a specific goal and deadline, and a system that allows all of the committee members to see everyone else's progress. NGP allows the campaign to set up personal fundraising pages for each finance committee member that can be viewed and managed by staff as well.

Set goals and timelines for the candidate, staff and volunteer raisers (finance committee) for the first report deadline.

Goals, Transparency, Accountability

As we wrote in Chapter 1, an Engagement Campaign requires sound leadership practices, including clear goals, lateral as well as vertical transparency around results, and accountability for volunteers as well as staff.

Setting up your finance committee is a great place to start practicing those skills. Give your volunteer raisers clear group and individual goals, make sure they can see their own results and those produced by others to foster learning and improvement over time, and hold them accountable to goals for which they've taken responsibility.

Hire finance staff as soon as possible.

Hire a professional fundraiser with campaign experience as soon as possible. An excellent early finance hire will be well worth their income down the line.

The more money you want to raise, the larger your staff needs to be. The ratio is usually one full-time finance staff person for every $500,000 to be raised. Larger campaigns will require more staff. You can also train interns to be volunteer finance assistants.

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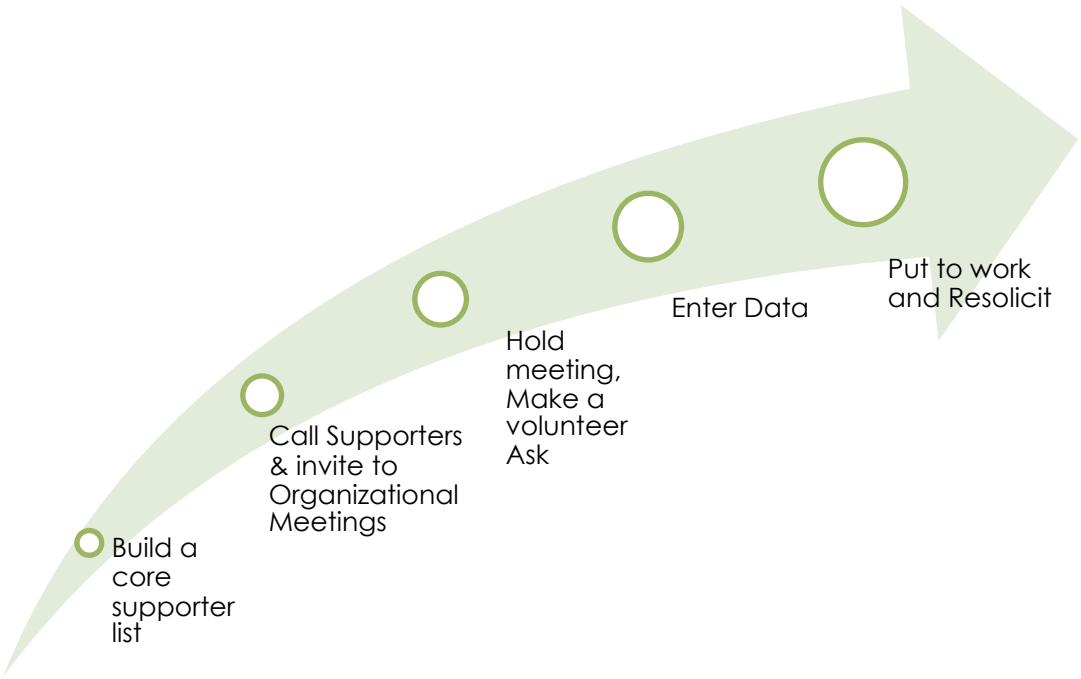
MAKING ROOM FOR VOLUNTEERS

Create a supporter and volunteer card

Create a simple supporter card with a clear volunteer ask that your candidate, advisors and key volunteers use to recruit supporters and volunteers at all events and in their own communities. Remember, human commitment is another currency in your campaign, so those commitment cards are like gold in hand.

Prepare to raise human resources

The way you recruit and engage people as a resource for your campaign is not that much different than your basic fundraising process. It starts with generating a list of core supporters (volunteers from past campaigns, friends, neighbors) or volunteer prospects. Then put your best volunteer on the phone to call through those people, invite them to an organizational meeting—ideally to meet the candidate, where you will ask them to take on the work of the campaign. Once they commit, be sure to set up a clear data system for tracking closely their commitment and their work.



Create volunteer responsibilities, not just tasks

Brainstorm a list of all the leadership responsibilities you could ask volunteers to take on. Remember they will need time to learn and practice, so create opportunities at various skill levels for volunteers with different campaign experience. Perhaps it's researching donors for your candidate, or managing the office, or collecting and collating press coverage online and offline. The more roles you have, the more leadership capacity you can absorb.

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SETTING UP DATA AND TECHNOLOGY

You will need to have a deliberate plan about where data is stored at the start of your campaign. An upfront investment of a few hours to set up data management systems will save you many, many hours later.

Your priorities should be:

1. Finance data – donors and contributions; online and offline. Track name, phone, address, email, pledges, sources of pledges (email, event, mail), and any legally required information for your race.

2. Voters—a system for tracking which voters support your candidate, which are undecided, and which support your opponent. Also track name, address, phone and email, and your campaign's contact history with each voter.

3. Volunteers – lists of who your volunteers are, how they are willing to help, and what their scheduled volunteer time and responsibilities are. Track name, address, phone, email, shifts scheduled and shifts completed.

4. Email – Collect emails from every supporter possible. For your online program prioritize first and last name, email address and zip code. For a text program prioritize cell phone number collection.

Spreadsheets (online or offline) are essential for keeping lists until you find another data storage solution for them, but this is not a long-term solution. As soon as you have funding or access, set up your VAN (Voter Activation Network) account, your finance database and your email database and upload all the data you've been tracking.

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CREATING AN ONLINE PRESENCE

You'll want to establish a basic online presence as soon as you get started. If you are working with a party committee, they will have suggestions or recommendations about creating your online presence, and may provide discounts for vendors.

Purchase a website name

This is typically something like "CandidateNameForCongress.com", "CandidateName.com" or "CandidateFirstNameforSenate.com". At minimum, the domain name should include part of the candidate's name. Do not over think this step. If someone owns the website name, pick another. Don't pay a huge amount for it. Make sure you set up your account so that it will automatically renew. You don't want to lose this website name once you have it.

Set up email addresses for yourself and the candidate

This can be your first name plus the domain name, such as fred@susanforsenate.com or the first initial and last name of the individual and the domain name, like sfreeman@susanforsenate.com.

Create or update your campaign website with basic information about the campaign and candidate

A simple website with a professional-looking, high resolution photo of the candidate, his/her bio, a place to collect email addresses and a way to contribute are all that you need to get started. Websites can seem complicated if you don't consider yourself technologically savvy, but if set up correctly, they can be very simple to update quickly.

Be sure you're set up to collect online and other credit card contributions

Being able to accept online contributions is a vital start up step.

Be sure you have a volunteer sign-up process on your website.

Anyone who's proactive enough to be checking out your candidate online is a volunteer prospect early in the campaign. Give them an easy way to sign up.

Be able to send email messages to large lists of people, including previous supporters or members of the press

You don't want to be sending emails to large lists of people from your personal email account. Any list over 40 should be sent through a tool designed to handle bulk email.

Start to create a presence on the rest of the Internet

You may not do too much with these right away, but it's important to have these accounts set up to establish your presence:

- ☐ Create a Facebook page
- ☐ Set up a Twitter account
- ☐ Set up a YouTube channel, to post video clips of candidate speeches and media appearances
- ☐ Set up Daily Kos account
- ☐ The options for social networking change year to year so build for your campaign whatever accounts you would have for yourself.

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BUILDING YOUR TEAM

HIRING STAFF

Once you have your basic systems in place and have started raising money you'll soon need other part-time or full-time staff to help you, depending on the size of your race. As a campaign manager, the choices about who and when to hire are among the most important decisions you will make. While there is no magic formula for selecting team members, here are some key considerations and questions to keep in mind.

Get the help you need, but follow your budget and your plan

Hiring staff before you can afford them can be a costly mistake. Like everything else on the campaign, stick to your budget unless your strategy shifts and you have adjusted your budget and cash flow to reflect the new staffer.

Make sure your team is well-rounded

Campaign managers typically come out of communications, field or fundraising. When hiring, make sure you are comfortable with the leader that represents your blind spot or area where you have the least experience. For example, if you don't have much communications experience, you will want to hire a strong Communications Director since you won't be in a good position to offer much training, coaching, or even strategic advice. Always keep in mind when you budget that you will need to spend more for more experienced and talented staff and plan accordingly.

More experience isn't always better

What is most important is the right type of experience, and the person's commitment to work hard and enthusiastically to get the work done right. It's often more difficult to retrain someone with bad habits than to train a person with no experience but the right attitude.

Commitment and motivation count

Campaigns are not the place for ambivalence – the hours are too long and the challenges are too trying for people who are not fully committed to winning.

Hire people who reflect your values and your voters

It is critical that you hire staff who reflect your campaign's values, which can be understood by the choices they've made in their lives and by references. In addition, hire locally as much as possible, and hire people who reflect the voters you will be organizing to win.

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Account for the position in your budget

Be realistic about what kind of applicant you can get for the salary you have budgeted, or at the very least be ready to beg someone to do you a favor and take a pay cut. Remember: do not exceed the salary range in your budget without adjusting cash flow or cutting from somewhere else.

Decide what the job is and write a job description

Values, skills and knowledge
Be very clear in your own mind about what values, skills and knowledge someone needs to get a job done. For instance, if you are hiring a Finance Director, you need someone who knows how to write a finance plan, run call time, set up events, and manage finance assistants. Unless you have the time to train someone in all the details (which you usually don't), you can't just find a smart person off the street. On the other hand, a good Field Organizer or Finance Assistant can be fresh out of college with no campaign experience. What matters most for their job is that they are smart, energetic, detail oriented, and highly committed. Only hire staff who share the campaign's core values as evidenced by the choices they've made in their lives.

Responsibilities
Decide exactly what this person will be responsible for: which goals on the campaign are they accountable for reaching? Which functions on the campaign do they supervise? Which staff are they responsible for hiring/managing/firing? To whom do they report? Which metrics are they expected to report and how regularly?

Write a job description
You will want two descriptions: the one you use to market the job in emails and job postings, and the one you give to someone when they start the job. Your public description should include information on the campaign, a little bit about the responsibilities of the position, and information on the skills and knowledge required to do the job. Remember, you want your public description to attract the best and the brightest, so make sure it creates a sense of excitement about the job.

The formal job description should very clearly lay out the responsibilities of the job, with special attention to the goals the employee is expected to meet, what functions of the campaign they are accountable for managing, and what/when they are supposed to report.

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Build a strong pool of applicants

Don't settle for second best. Take the time to identify and recruit the best candidates. Use these tips to guide your search.

Tips for Building a Strong Applicant Pool

Most hiring mistakes occur not because managers select the wrong person, but because they can't find the right candidates to begin with. Here are a few tips to help you build a strong pool and avoid that trap.

Mass-marketing:

- Contact friends, colleagues, and staff members whom you trust and ask them to circulate the announcement
- Submit posts to job sites (including www.democraticgain,org; www.idealist.org ; www.jobsthatareleft.org)
- Use job banks at your state party, or other party committees

Individual headhunting:

- Ask friends and colleagues for specific people they have worked with and would recommend for the position
- Ask your consultants for strong staff from other campaigns they have worked on
- Call colleagues at the state party or other local party organizations and ask about people who were working locally on a campaign (someone who was a finance assistant locally during the last cycle could be a great Finance Director for you this cycle)
- Identify other local campaigns (electoral, labor, issue) that will be finished before or when you are looking to hire

Adapted from Alison Green and Jerry Hauser, Managing to Change the World

Screen applicants and interview

Start with a round of phone interviews and pare your list down to few people for a second round. You may not have the luxury of an in-person interview if applicants are coming from different parts of the country. For important roles like Finance Director, Communications Director, or Field Director—and depending on the strategic importance of the position and your distance from the applicant—you may need to pay for the applicant to travel. Think ahead of time if this will be necessary so you can plan for the extra time it will take.

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Sell the position
You will need to motivate the best candidates to come work with you—practice your pitch and build a sense of excitement around the campaign and the job. This isn't any old job, or any old campaign, and you're not any old manager.

Probe prior experience
Avoid asking "can you do this" or "could you handle this" (because guess what the applicant will say!). Rather ask what they have actually done in their prior job, for instance "tell me about your last job…tell me how you handled a situation like this."

Exercises
If a particular skill is important, test it. If you are interviewing a Communications Director, send them some talking points and ask them to send you a statement within 30 minutes. If you are interviewing a Finance Director, send them the name of a donor and ask them to send you a detailed call sheet in 45 minutes. If a skill is important, test it.

Check references

Always check references. Don't just limit yourself to the references you are given—call friends and colleagues to identify other people who may have worked with the job candidate.

Make it easy for references to be honest with you—instead of asking "would X be good at this job", ask "what sort of position(s) do you think X is best suited for?" or "As X's manager, what sort of development would I need to focus on most?"

Make a decision and make an enthusiastic offer

When you have decided whom you want to hire, call them, or meet with them and make a clear offer: the job title and role, the salary, start date, and any benefits. Put the details in writing on paper or in an email so there is a clear record of what was offered. Also make sure counter offers are recorded as well.

SELL, SELL, SELL. The best managers get great people for a great price. Your most desirable applicants will likely have a number of opportunities for work, and your campaign will most likely have the lowest salary and the toughest workload and hours. If you want someone badly, you're going to need to sell them on the job, so think of your offer as a pitch, not a favor. Replace what you might lack in salary with inspiration—make sure to explain WHY they should come work on your campaign and what they'll get out of it personally, not just what they'll do for you.

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Have your new hire sign a job description and employee agreement

Employee agreements help you reinforce working norms that may be standard practice for campaigns (such as not talking to the press unless authorized to do so), as well as norms that are standard to the modern workplace, such as forbidding sexual, racial, and other harassment. The agreement gives you legal cover if you need to let someone go for inappropriate behavior (such as harassment) or misconduct (such as talking to the press).

An employee agreement is especially vital if you have large numbers of staff, such as canvassers, meaning that you may have cause to let people go on a regular basis.

HIRING CONSULTANTS

Hiring the right consultants, like hiring the best staff, will be one of the most important things you do on the campaign. Great consultants can be the difference between winning and losing. They can provide enormous amounts of experience, expertise, and motivation to you, your candidate, and the campaign. In the case of media, polling, mail, as well as phone, web, and other consultants, their work product is indispensible to the campaign. Building a good consulting team is vital to your campaign and it should be done with the same care as hiring staff.

On a typical state or federal level race you will hire a media consultant to oversee your paid media; a pollster; a mail consultant; a research consultant and a web firm. Other campaigns will hire general consultants to help campaign managers determine what their consultant team should look like, and to provide broad strategic advice or help with political outreach.

But before setting out to hire a consultant, you should ask yourself three questions:

1. Do you really need the consultant's service(s)? Is the service vital to your strategy?

2. Can you afford to hire a consultant? Does their fee fit within your budget? What else are you sacrificing to hire this consultant?

3. When do you need to hire the consultant? You always want a consultant (like any member of your team) to start on the campaign as early as possible. If the consultant is paid monthly or weekly, the earlier you hire them, the more they will cost. If they charge you based on their work product, regardless of when you hire them, get them on as early as possible to get their help as early as possible.

Pitching

Whenever possible, you should have multiple people or firms pitch you for the same service, so you can choose the consultant/firm that best matches your campaign's needs and values. Before sitting down for a pitch, you need to do some homework.

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Know what you're looking for in a consultant

What particular strengths do you need your consultant(s) to have? You might need regional experience; experience with a particular type of campaign; or experience working with a particular type of candidate. Consultants bring different skills, experiences, and personalities, just like managers.

Know what you can afford and what you should pay

Understand the pricing structure that a consultant is using and be ready to ask specific questions about what their price structure will be. Know what your budget says you can afford and get advice from colleagues on what aspects of pricing you can negotiate.

Know who you're talking to

Make sure you and your candidate have done some research on the consultant. Get input from others on their experience working with the consultant, look at their past work, know something about the previous campaigns on which they have worked.

Before you sign a contract

Negotiate a reasonable price that fits within your budget. Don't be shy; it's your job to negotiate.

Get a copy of the proposed final contract and read it. Understand what you're paying for and how much it costs. Consultants use a number of different payment plans. Most charge a standard fee for their product: media consultants take a percentage of the media buy, mail consultants take a percentage of each mail piece, pollsters charge a certain amount per poll, and so on. Keep an eye out for fees added at the beginning or end of the consultant's service, such as win bonuses and signing fees.

Circulate the contract to colleagues and ask for their input. Have your lawyer look over the contract. Make sure your candidate understands the financial obligations of the contract. Make sure the contract will work within your budget and cash flow.

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CONCLUSION

The time and intentionality you invest early on in setting up sound systems and hiring the right people will pay dividends when it matters most to your campaign.

You'll find tools and samples on the following pages to help you set up your own campaign systems.

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SAMPLE CALL SHEET

01/12/11 (date created)

ASK AMOUNT $1,000

Zoe Markham
1402 Emerson Street, NW
Washington, DC 20011

Work phone: (202) 223-8885

Home phone: (202) 543-1361
Fax:
Mobile phone: (202) 744-0893
Email:

Employer: The Campaign Workshop
Title:

Notes: Do not call Zoe until 2012 because of travel in December

Contribution History

Date	Amount	Cycle	Period	Source
11/14/09	$1,000.00	2010	Primary	dc lunch
10/01/08	$1,000.00	2008	General	dc lunch
06/13/08	$1,000.00	2008	Primary	women's lunch
03/26/08	$1,000.00	2008	Primary	

Pledge History

Date	Amount	Period	Source	Type	Paid
10/31/09	$1,000.00	Primary	dc lunchS		$1,000.00
03/14/08	$1,000.00	Primary	call time	H	$1,000.00

Pitch
Zoe is a previous donor who needs to understand the challenge you face this year. When you spoke with her last year, you didn't know who your opponent would be.

Comments
Zoe used to work for EMILY's List; husband does immigration policy

Follow-up

Submitted By: _____

Completed By: _____

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SAMPLE CALL TIME SCRIPT

Steps in a fundraising ask:

1. Establish rapport
2. Explain your strategy
3. Prove you can win with the right resources
4. Research and begin prospecting affiliated network
5. Get donor invested
6. ASK AND BE SPECIFIC
7. Zip it up and listen
8. Collect
9. Show appreciation
10. RESOLICIT

Sample call time ask:

Hi, Zoe, this is Belle Weather. How are you? It's been a long time since we've spoken. You've been such a great supporter but I only see you across the room at those big DC events. How are you? How was your trip last month?

Obviously, you have been aware of the work I've been doing in Congress. The new news in this race is that I now have an opponent and the opposition is really targeting this race. He has a clear record of not supporting basic women's rights….

We actually haven't done our baseline poll yet but did you see the recent numbers in the news? People who know me have a positive view of the work I've been doing in Washington.

The problem is that it's hard to reach people that don't know who I am. It's such an expensive TV market, I really have to find other ways to communicate with voters. So we're going to be running a much more extensive field operation this time. Of course, that takes more money up front, but I think it will be very effective. I've hired a former Obama state director as my manager.

You've been so helpful already this cycle, do you think you could contribute another $1,000 this month?

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SAMPLE CALL TIME TRACKING SHEET

Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									

Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Monthly Total									

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SAMPLE CANDIDATE SCHEDULE FOR EARLY DAYS

7:30 am — Staff to pick you up at home
Alicia Woodward, Mobile: (202) 555-1212

8:00 am — Fundraising breakfast with labor unions
Teamsters Local 431
555 East Rich Street, Columbus 43215
Phone: (614) 228-6492
Contact: Sherry in Tony Jones' office
Alicia will staff you
(see attached invitation)

9:00 am — Depart for HQ

9:30 am — Call time at campaign HQ

11:30 am — Depart for lunch

noon — Lunch with prospective donor, Donna Foley
Olive Garden
1250 POLARIS PARKWAY, COLUMBUS 43240
(614) 885-0080
(see attached call sheet)

2:00 pm — Call time at campaign HQ

4:00 pm — Interview with the Los Angeles Times
By phone (213) 237-5000; YOU CALL THEM
Jim will come over and brief you before the call

4:30 pm — Call time at campaign HQ

6:00 pm — Depart for event

6:30 pm — Fundraising event with progressive organizations
Home of Les Wexner
New Albany, OH
Phone: (614) 628-4160
Contact: Kim in Wexner's office
Alicia will staff you
(see attached invitation for host list)

8:00 pm — Depart for home

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SAMPLE CANDIDATE SCHEDULE FOR EARLY WEEKS

Monday
Breakfast with business leaders
Work
Call Time

Tuesday
Breakfast with labor leaders
Work
Call time
Work
Reception with progressive organizations

Wednesday
Breakfast with constituent group
Work
Call time
Work
Dinner with family

Thursday
Breakfast with women members
Work
Caucus lunch
Call time
Work
Dinner
Call Time

Friday
Haircut with Latifah
Work
House party with supporters
Attend local high school basketball game

Saturday
Breakfast with kitchen cabinet
Town hall meeting at local library
Lunch with potential donors
Visit local VA hospital
Call Time & Donor one-to-ones

Sunday
Church
Local historical society event

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SAMPLE EVENT BRIEFING MEMO

This form can be used to brief a candidate on an event and as a guide for what information to get when collecting scheduling requests

Event Name:

Date:

Event Time:

Arrival Time:

Attire:

Location:

Local/Onsite Contact and phone:

People Attending:

Elected Officials
Attending:

Press:

Event set-up:

Event Program:

Introduced by:

Additional information on the event:

Bio Information on Event Hosts or Organization:

Recent News Articles related to the group or geographical location of event:

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SAMPLE QUESTIONS FOR A CONSULTANT

Have you worked in the state/district before? For whom?

How many clients do you have now?

How many congressional races, statewide races, local races will you take on this year?

Are you doing more than one race in the state?

Who specifically will work with my campaign? What kind of time commitment can they provide? What is their background?

What is your ideal consultant-campaign manager relationship?

What is your ideal consultant-candidate relationship?

How would you approach my campaign?

What is the first thing you'd do if we hired you today?

How often do you like to communicate with the campaign and how do you like to do that?

What similar kinds of races have you worked on?

Have you ever had conflicts with other members of the campaign team and how have you worked that out?

What would your fee structure be for this campaign?

Where do you make a profit?

Can I see work samples? (video/polls/mail pieces, etc.)

For media consultants specifically:

How do you integrate your broadcast, cable, radio, and online buys?

Do you buy media in-house or work with another firm? If the latter, who is that firm? How do you work with them?

What is your opinion of cable in this/these markets? How would you buy it?

What about radio? Metro vs. rural?

What type of experience do you have with online media?

What does a typical shoot cost? Can you please explain all the costs involved?

So after a shoot, you need to produce the ads. What are production costs for a TV ad? What about radio?

What's the most effective ad that you've ever done? Why? How do you know it was effective?

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Chapter 3

ASSESSING THE LANDSCAPE

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CHAPTER 3:
ASSESSING THE LANDSCAPE

INTRODUCTION

Every candidate and campaign is unique. In order to develop a strategy appropriate to your candidate, region and campaign cycle you'll need to spend some time assessing the landscape.

It's as if you were getting ready to climb a steep mountain. Before you start climbing, you'd want to have a very good sense of your own resources, the resources you could pick up along the way, your weaknesses, the opportunities you'd have to get extra leverage, and the threats that lie in your path.

You'll assess the campaign landscape in the same way, first by getting a really clear picture of the terrain—the race, the opposition, and your candidate. This includes an internal assessment of your strengths, weaknesses, opportunities and threats and a thorough interview with your candidate. You'll also want to do outward looking research on your candidate, supporters and opposition.

The next step is to lay out the path your campaign will take along a strategic timeline, including dates you can't control, and dates that you'll set to challenge your campaign to scale new peaks.

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UNDERSTANDING THE TERRAIN

All of your early research comes down to understanding four things: Your candidate, your opponent, your district or state, and the electoral climate.

- ☐ What is the political system in this district? Is it a single-member district? Are office holders chosen with a primary and general election? Or a nominating convention? Are there run-offs if no candidate gets to 50%?
- ☐ What laws affect your race? How does a candidate get on the ballot (collecting signatures vs. signing up)? When do candidates file? What are the contribution limits? When can candidates raise money for the race?
- ☐ What is the campaign timeline? How many days until Election Day?
- ☐ What does the district look like geographically, demographically and politically? How do people get their information? What are the media markets?
- ☐ Describe this specific race. Is it an open seat or challengers race? Is it a rematch?
- ☐ Broadly speaking, what is the mood of the electorate?
- ☐ What other candidates or ballot measures are on the ballot that may affect turnout?
- ☐ Who are your opponents and what do you know about them?
- ☐ Who are the current critics of your opponents, and what negative information is already circulating about your opponents?
- ☐ Based on your candidate's narrative and political background, plus other recent electoral results, who and where are the voters that will most likely support your campaign?
- ☐ What is your candidate's current online profile? What do people find when they Google your candidate? Is it easy to find factual or positive information?
- ☐ What human and financial resources does the campaign already have access to?

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What's your SWOT?

Strategizing begins with a clear, honest assessment of the Strengths, Weaknesses, Opportunities and Threats that face your campaign. When you write your programs for each phase later, those programs should be ones that leverage your strengths to make up for your weaknesses, taking advantages of opportunities, and pre-empting threats. Conduct a SWOT analysis with your candidate, staff, and kitchen cabinet very early in your campaign. You should also conduct a SWOT for your opponent to help you predict the basics of their strategy.

	STRENGTH	WEAKNESS	OPPORTUNITY	THREAT
NATIONAL CLIMATE/STORY				
THIS CYCLE				
DISTRICT				
CANDIDATE				
CANDIDATE'S FAMILY				
CAMPAIGN MANAGER				
MONEY FOR THIS CANDIDATE				
MESSAGE FOR THIS CANDIDATE				
MOBILIZATION FOR THIS CANDIDATE				

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CONDUCTING RESEARCH

Interview the candidate

The first step in knowing your candidate is having an in-depth discussion about the candidate's life story, vision for the office, and positions on key issues. You'll also need to have a frank conversation about the candidate's weaknesses and vulnerabilities. The opposition will surely be looking for the proverbial skeletons in the candidate's closet, and it's best to know what they are up front so you can make plans to deal with them. The candidate interview is the first opportunity to gather stories and themes for the message – and often your only primary source.

See the sample questions for a candidate interview at the end of this chapter.

Talk to your core supporters

Your persuasion campaign focuses on swing voters, and your mobilization campaign focuses on base voters. To run an effective Engagement Campaign that can engage voters in both persuasion and turnout, you need to engage your core supporters – people who are willing to give their time and money to help you succeed. People who already know the candidate are the most likely to engage others on your behalf, and you need to know how to keep them involved.

Core supporter research has two goals: 1) to understand what drives the passion of people who already know and actively support the candidate, and 2) find out what activities they will participate in to spread the word and get others involved.

Core supporter research can be inexpensive – or even free – if you can recruit supporters willing to discuss their feelings about the candidate and campaign. Discussions can be conducted in person, on the phone, or on the Internet using a chat room. If you have an email list of supporters, you can survey them as a start.

This should generate ideas that you can test with the much larger group of voters. The information you derive will help you develop your narrative and program, and focus your efforts on activities that interest them, so that you get the most bang for your buck.

See the sample discussion questions for message development and survey questions about engagement activities at the end of this chapter.

Conduct self research

Self research is a dedicated effort to collect and analyze the public record of your candidate. Self research will give you an objective idea of your candidate's vulnerabilities. You can use this information to develop your message (by addressing vulnerabilities in a positive way) and to develop plans to counter attacks from the opposition or the media. If possible, test vulnerabilities in public opinion research to determine which really threaten your success. Don't underestimate the ability of one small comment or isolated issue to distract the entire campaign.

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Depending on your budget, you can hire a professional research firm to help develop your self-research book. In the appendix is a list of topics to examine for strengths, vulnerabilities and red flags. These topics should also be addressed in the candidate interview.

See the topics for self research at the end of this chapter.

Conduct opposition research

In order to further differentiate your candidate from the opposition – and keep your opponent on his or her toes throughout the campaign – your campaign should conduct research on your opposition's voting record, policy statements, tax and property records, and other information from public records. By following the same checklist that you used for your research on your own candidate, you can produce valuable information about your opposition that can be useful in crafting the contrast message, placing stories in the media, and preparing for debates.

During the campaign, tracking your opponent's speeches, appearances, advertisements and social media presence will help arm you with information you can use to draw contrasts and gain leverage with your opponent. Campaigns will often ask volunteers or staff to videotape the opponent speaking at public events, as well as monitor the opponent's media coverage and social media content.

At the end of this chapter, you can use the self-research questions to start outlining your opposition research plan.

Conduct policy research

Research the issues that are important to the candidate and to voters. When developing your candidate's agenda, you are looking for a synergy among issues that motivate voters, highlight the candidate's strengths, and draw a good contrast with the opposition. You can start with your self-research questions and your core supporter research to start to determine which issues to test in a survey with voters. But always remember that surveys are just one indicator of the mood of the electorate. It is critical that your candidate speak from his or her own convictions and not simply follow the tide.

Policy solutions should be focused on concrete actionable solutions to real problems your constituents face. Party committees, PACs and think tanks at the state and federal levels can provide background information on issues and ideas for policy proposals. Below are some potential resources:

- Center for American Progress (www.americanprogress.org)
- National Security Network (www.nsnetwork.org)
- Democracy Corps (www.democracycorps.com)
- Brookings Institution (www.brookings.org)

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DEVELOPING YOUR CAMPAING TIMELINE

Part of assessing the landscape is getting a very clear picture of your campaign timeline. At this point you do not need to flesh out every week and day in detail. You need to sketch out the general narrative of your campaign timeline so that you can fill in the programmatic details later in your campaign.

Here's the strategy chart for an Engagement Campaign again:

ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy				
Message Strategy				
Mobilization Strategy				
Management Strategy				

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Fill in Key Dates

First are the dates outside your control that present both opportunities and challenges to your campaign. Put these on your campaign plan.

EXTERNAL DEADLINES & OPPORTUNITIES
ELECTIONS Election Day Primary days (Democrat & Republican) Petitioning/filing deadline
MOBILIZATION Voter registration deadline for primary Voter registration deadline for general election First day of early vote Last day of early vote Vote by mail (VBM) ballots first mailed Last day to request VBM by mail Last day to request VBM in person
MESSAGE Debates Expected endorsement deadlines
MONEY FEC deadlines
OTHER OPPORTUNITIES First day of school First day students are on college campus Major national holidays (esp. 3 day weekends) Major festivals, fairs, etc. Gatherings of major constituencies in your district Anniversaries of major national or local events

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Second are the dates you need to set for your campaign. This should include your major campaign milestones but also your major planning and training dates. Don't worry about filling in every single detail. When you write the program for each phase later you can fill in smaller benchmarks or milestones.

Your major milestones should be dates on which you can conduct a campaign-wide test of your organization, like the first campaign kickoff rally to launch the Engaging Supporters phase, a district-wide canvass to kick off the Engaging Voters phase, and a dry run to test your GOTV capacity.

Choose specific dates for these three to four major campaign milestones now so that all your strategy and plans can be focused on building toward those dates and tests.

DEADLINES & OPPORTUNITIES SET BY YOU
MAJOR MILESTONES Campaign launch Quarterly finance benchmarks Kickoff date/event for Engaging Supporters phase Kickoff date/event for Engaging Voters phase Kickoff date/event for GOTV phase Benchmark for first TV buy Baseline poll Tracking polls
MAJOR PLANNING DATES Staff retreat for message/plan revision Staff retreat to plan Engaging Supporters program Date for Staff and Volunteer Leader trainings on Engaging Supporters Staff retreat to plan Engaging Voters phase Date for Staff and Volunteer Leaders training on Engaging Voters Staff retreat to plan Winning phase (GOTV) Date for Staff and Volunteer Leader training on GOTV

Tell the story of your timeline

You need to be very clear about when each phase starts and ends with specific dates, and how one phase leads to the next. The phases provide the narrative arc for your campaign, and if you clearly lay them out for staff and volunteers it can create purpose and urgency much earlier in your campaign than if your team is not sure where they're going. For example, "we're focused on engaging supporters during this summer through house meetings and voter registration so that we have more capacity to engage voters in the fall, and to turn out all of our supporters during Early Vote and Election Day. If we don't find and develop our volunteers now we won't have the capacity to win later in the campaign."

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SAMPLE CANDIDATE INTERVIEW QUESTIONS

These are a few suggestions to get you started. Before sitting down with the candidate, do your homework on her background. Come prepared with probing questions about choices the candidate has made in life.

Core Values *(Deep down, what truly motivates you to run for this office? Complete the following "belief statement.")*
I am running for office because I believe ...

Audiences *(Describe each)*
Constituents: Who would you represent in Congress?
Base: What voters are most likely to support you?
Core supporters: Who will get actively involved in your campaign?
Influentials: Who are the opinion leaders in the District?

Hopes & Goals
What do voters in your district hope for the future – for themselves and their families? Their community? The country? What do you want to achieve on behalf of your constituents?

Obstacles
What stands in the way of voters achieving their goals?

Ideas
What ideas do you have for overcoming these obstacles and helping your constituents achieve their goals?
What policy changes are most important?
What can you do beyond changing policy?

Personal Story
What's your family's story?
What values and life lessons did you take away from your family's experience?

Career
Why did you choose to enter your current profession?
What have you accomplished in your career?

Community Service
What have you done to help others?

Positioning
How are you different from other expected candidates?

Viability
How will you win this campaign?

Campaign
Describe the kind of campaign you will run.

Is there anything we should know about your own history or your family's that could damage the campaign if it surfaced? (If we identify it now we can make a plan for how to deal with it if it surfaces.)

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SAMPLE CORE SUPPORTER DISCUSSION QUESTIONS

The goal of these discussions is to find out what attributes of your candidate and campaign really drive the interest and passion of your supporters.

These are open-ended questions to get your supporters talking about your candidate. The idea is to find out what they find most appealing, without asking leading questions. You also want to find out what they tell others – so that you can find language that people will repeat to each other by word-of-mouth.

- How did you first hear about the candidate?
- What did you hear about the candidate before you met him/her?
- How did you first meet the candidate?
- What do you remember most about meeting him/her for the first time?
- What is most appealing to you about the candidate?
- What key words come to mind when you hear the candidate's name?
- Why are you volunteering your time to the campaign?
- What would make you stop supporting the candidate?
- What's the most important thing other people need to know about him/her?
- What do you tell others about the candidate?
- What would you say to friends to get them interested in volunteering?
- What activities would you recommend for getting out our message?

Survey Questions About Engagement Activities

Which of the following campaign responsibilities would you be willing to take responsibility for? Please rate them on a scale of 1-10.

- Host a house party for your friends & family to meet the candidate
- Lead a team of fellow volunteers to engage a group of voters at their doors or on the phones
- Raise money
- Lead a data processing team
- Conduct issue or donor research
- Cover the office
- Write letters to the editor
- Call into radio talk shows
- Monitor news coverage
- Monitor and post comments on blogs

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SAMPLE SELF AND OPPOSITION RESEARCH TOPICS

News Clips
Set up automatic, real time searches of news, blogs and social networking sites for mentions of your candidate's name and members of his or her family.

Court Records
Check state and federal civil and criminal court records for any court cases involving the candidate or members of their family.

Tax Records
Check state and local tax offices for tax records. Check home property tax as well as other property taxes like cars and other possessions. These are usually in separate offices.

Property Records
Check the register of deeds to pull property records for your candidate in the places they have lived, including mortgages and liens.

Company/Job Issues
Depending on your candidate's profession, you should evaluate controversial and newsworthy issues that have arisen at the place of employment of the candidate.

The state's Secretary of State web-site should also be checked to see if the candidate or their family is or is affiliated with a registered agent with any businesses in the state. If so, be sure to understand the business and any vulnerabilities that may come from the candidate's involvement.

Campaign Finance Reports
Compile campaign donations made by the candidate and members of their family. Also look at who has given to your candidate in the past.

Voting History
Check voting history of candidate and family at State or local Board of Elections website.

Public Speeches/Appearances
Check YouTube and other online video sites for any speeches or public appearances by the candidate or members of the candidate's family.

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Chapter 4

CRAFTING THE NARRATIVE

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CHAPTER 4:
CRAFTING THE NARRATIVE

INTRODUCTION

This chapter will introduce you to principles, techniques and tools for crafting a narrative that will motivate and mobilize voters and supporters, including:

Narrative structure and creating a voter-centered narrative about the campaign.

Message development and how to develop a motivational message.

Research to inform the development of your message and strategy.

In this chapter, we're going to walk through the steps for creating a campaign narrative. We're also going to focus on crafting messages, based on the narrative, that you can test in public opinion research and use to engage and persuade voters in your field operations, fundraising, earned media and advertising.

A **narrative** is a five to seven-paragraph statement offering a complete, coherent rationale for the candidacy, which links the candidate's personal story to the hopes and concerns of voters.

A **message** is a succinct statement about the candidate, an issue, the opponent, or any other aspect of the narrative that is persuasive to voters. Any single message you communicate should always fit within the broader narrative of the campaign.

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WHAT IS A CAMPAIGN NARRATIVE?

Narrative is a powerful form of communication

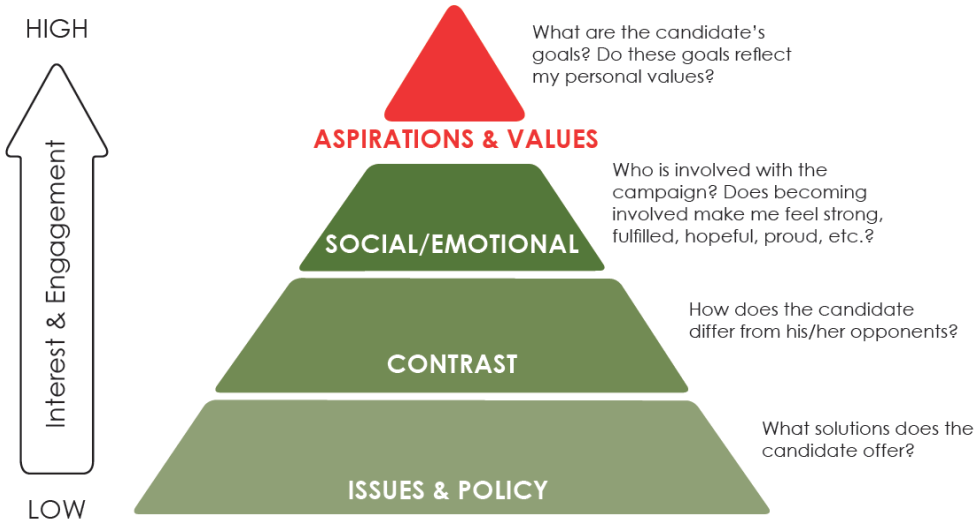
Across cultures, narrative is the most powerful form of communication.

A well-told story communicates much more than facts: It connects what the narrator is saying to stories people already know, which gives the story meaning and makes it memorable. It creates an emotional reaction, which makes people care, and it teaches a moral, which speaks to people's values.

The best communicators in politics are great storytellers. An effective Engagement Campaign uses the power of narrative to motivate people.

Narrative needs to be aspirational

The following pyramid demonstrates how your campaign needs to appeal to voters on many levels in everything you do, from a donor ask, to a press release, to a volunteer ask. Appealing to them simply at the issues and policy level, or at the level of contrast with your opponent may be easier, but also less effective.



Aspirations and Values

The highest level on which you can appeal to people is the "aspirational" level– the level at which they see their own values and hopes reflected in the campaign. People are most motivated to vote for and support candidates they see as representing their own hopes and values, those they see leading the community in the direction they themselves hope to go. Your campaign narrative will need to engage people at an aspirational level to motivate the public to turn out and get involved.

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Social and emotional

Supporting a candidate or taking any action for a campaign is a fundamentally social act. When volunteers and voters consider a candidate – much less fork over their precious money or time– they want to know about the people involved. That is usually true even if they don't directly ask about the social components of a campaign. People look at the personal qualities of the candidate, as well as the people who support the candidate. Voters need to see themselves reflected in the people behind the campaign. Volunteers are also looking for a meaningful social experience – spending time with people who share their values and interests. This means making your campaign a fun, enthusiastic, meaningful place to volunteer.

Contrast

Elections are about choices. You obviously need to draw a clear contrast with your opponent. But the comparative aspect of the campaign should go beyond positions on the issues. Your candidate's bio, the message about your campaign – even the look and feel of your website, ads and events – should set you apart from others.

Issues & Policy

People do need to know where the candidate stands on key issues – and the candidate's positions can also tell people something about his or her values and beliefs. Beyond that, however, people don't need to know every detail of the candidate's policies and programs. Too many campaigns get bogged down in trying to interest voters and the media in policy. It's definitely part of the picture – and can occasionally be critical when an event or crisis focuses public attention on the candidate's response. Yet for *motivating people*, remember that this is the very bottom of the hierarchy. Also, the reality is that any candidate can only generate policy in the context of governing and negotiating with others. What's most important is the candidate's core values, which will shape policy negotiation down the road.

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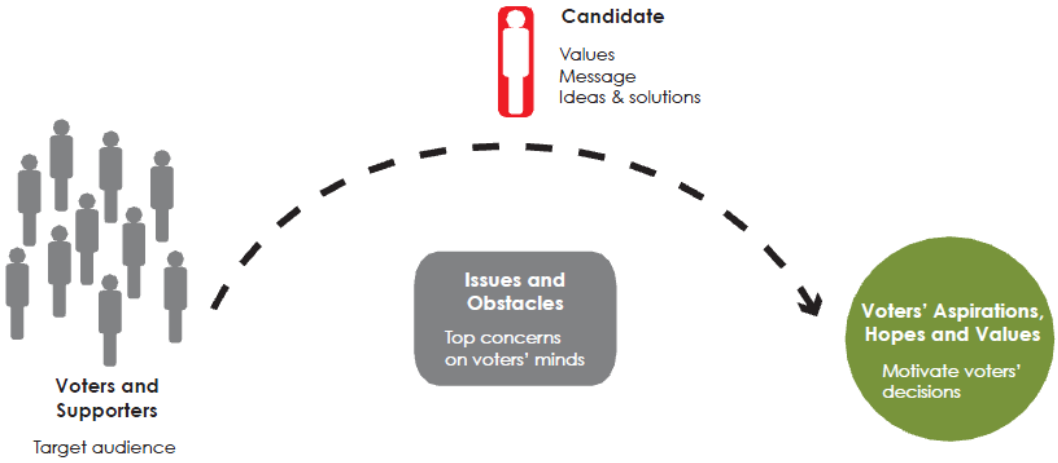
CAMPAIGN NARRATIVE STRUCTURE

In a campaign narrative, the voter is the protagonist who seeks to reach important goals, but faces obstacles along the way. The goals are the hopes and values that are most important to your voters. The candidate's role is to offer ideas and inspiration for overcoming obstacles to help people achieve their aspirations.



This narrative structure focuses on voters – and keeps the focus on them throughout the campaign. It also includes supporters (people who give their time, energy, and money to the campaign) and acknowledges the vital role they play. Connecting the candidate with the aspirations of voters and supporters is what motivates people to get involved.

Different elements of the narrative will be emphasized for different audiences. The message delivered to undecided voters in the persuasion campaign will focus on values, bio and/or issues – and on the opposition. The message used to engage supporters will also focus on the campaign itself and the people involved.

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SAMPLE CAMPAIGN NARRATIVE I

Here's an example of a narrative for a successful first-time candidate to the Boston City Council.

Everyone should have a voice in their government and live in a neighborhood they are proud to call home.

Values. This is a statement of core beliefs that explains why the candidate is running for office. This should also reflect the values of voters.

But too many people feel their voices are not heard and are concerned about their communities – people are losing their jobs, don't feel safe in their neighborhoods, and worry about the quality of their children's education.

Issues & Obstacles. This describes the problems that stand in the way of people's hopes and values. It should reflect top concerns on voters' minds.

We can build a better Boston – where everyone's voice is heard and where people work together to strengthen their communities.

Goal. This is the candidate's vision for what he will achieve if successful. It should be ambitious and inspiring.

Felix Arroyo was raised in a family of teachers, who taught him that everyone has something to give. Both of his parents were teachers, and his wife teaches in a public school. That's why he chose to become a community organizer. He currently works as a healthcare organizer and he previously worked as a labor organizer, helping people get good jobs with fair wages.

Bio. This describes relevant aspects of the candidate's life that demonstrate his values. It references an important life choice to show his values in action.

Felix practices what he calls "collaborative politics" – bringing people together to make their voices heard and their communities better. His campaign is bringing together people from all walks of life across the city – people who believe that, working together, we can build a better Boston for everyone.

Campaign & Supporters. This suggests how he will govern if elected. It also describes the people involved in the campaign.

If elected to the City Council, he will work to create a level playing field so that everyone has access to their government – and keep working with people from the community to create more jobs, safer streets, and better schools.

Issues. These are the top issues that the candidate will address in office – and how he will work to address them. These issues are phrased in terms of outcomes, i.e. "more jobs, safer streets, better schools."

Join our campaign – you'll meet great people and make a real contribution. Let's build a better Boston.

Call to Action. The narrative concludes with a direct invitation to get involved. It also describes the experience people will have with the campaign.

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Develop a motivating narrative about your campaign – and the people involved

To keep people motivated over the long haul of the campaign, they need to know that they are part of an exciting and meaningful undertaking. You need a narrative about your campaign and the people involved. Barack Obama excelled at this in his 2008 campaign, so we've included examples from that campaign.

The supporters

> *"You have enriched my life, you have moved me again and again. You have inspired me. Sometimes when I have been down you have lifted me up. You filled me with new hope for our future and you have reminded me about what makes America so special. In the places I have gone and the people I have met, I have been struck again and again by the fundamental decency and generosity and dignity of men and women who work hard without complaint, to meet their responsibilities every day." –Barack Obama*

Paint a compelling picture of the people who support your campaign. When voters hear about people like themselves getting involved with the campaign and committing to the candidate, it is usually more powerful than endorsements from other politicians, celebrities or institutions. Note in the quote above how candidate Obama talked about his supporters as decent, generous, dignified, hard-working and responsible people.

The campaign that creates an emotional connection with supporters keeps them coming back. Note above how Barack Obama created an emotional connection with his supporters that kept him going – and kept them motivated.

Tell stories of volunteers who exemplify the spirit of the campaign – on your website, at campaign events and in other campaign communications.

The campaign

> *"We can do this. It will not be easy. It will require struggle and sacrifice. There will be setbacks and we will make mistakes. And that is why we need all the help we can get. So tonight I want to speak directly to all those Americans who have yet to join this movement but still hunger for change - we need you. We need you to stand with us, and work with us, and help us prove that together, ordinary people can still do extraordinary things."—Barack Obama*

People need to know their contribution makes a difference – not only to winning on Election Day, but also to creating change in society. Seeing themselves as part of something larger will motivate them to give of their time and energy.

Continually tell the story of the campaign as it evolves. As you reach key milestones, be sure to tell supporters about each accomplishment they helped achieve. This reminds them that their individual efforts make a difference – and that they are part of a community working toward a common goal.

When the campaign faces a setback, be sure to tell them about that as well. People aren't just inspired by positive stories – they must know that their efforts are needed. Telling the story of the campaign's supporters and the milestones and setbacks they share along the way creates an emotional experience for your supporters that makes their investment in the campaign personally meaningful.

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SAMPLE CAMPAIGN NARRATIVE 2

This is a narrative from a successful 2008 campaign for a Democratic candidate who won in a heavily Republican Congressional District.

Here in New Mexico, we're looking for change in the direction this country's going – and we need leaders who will listen to us, put New Mexico first, and bring people together to get things done.

Values. This reflects a top concern on voters' minds in 2008 – a change in leadership – and the kind of leadership people value.

But the politicians in Washington listen to the lobbyists – and they don't represent our values. They just bicker and don't get anything done.

Issues & Obstacles. This shows "politics as usual" as standing in the way of change.

Harry Teague will bring New Mexico values to Washington and opportunity to southern New Mexico.

Goal. This is the candidate's vision for what he will achieve if successful.

At age 17, Harry Teague went to work in the oil fields to help support his family. Working on the team, he learned that we're all in this together – and you have to bring people together to get things done.

That's how he started his own oil well services company – and that's why he provides health care for co-workers and scholarships for them and their children – which keeps opportunity here in New Mexico.

Bio. This describes relevant aspects of the candidate's life that stress his genuine connection to his constituents. It shows how he would govern – drawing on real-life lessons. It also gives examples of choices he has made – i.e., providing health care to his employees – that demonstrate his values in action.

In Washington, Harry Teague will bring people together to get things done: Bringing more opportunity for our communities, health care for our families, and better education for our children.

Issues. These were the top issues on voters' minds, given the economic downturn.

People who support Harry Teague are people like us – who live here in southern New Mexico, and represent hard work, family and community.

Campaign & Supporters. This connects the campaign with the constituents, and sets up the contrast with the opposition.

His opponent is a Washington lobbyist who doesn't even live in the district. He spent most of his time lobbying against the needs of working people.

Contrast. This differentiates the candidate from his opponent, focusing on bio and values – not just issues.

Let's send someone like us to Washington – someone who will represent a real change in direction.

Call to Action. This repeats the core appeal of the candidate and ends on a positive note.

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Contrast

Just as the bio tells a multi-layered story about the candidate, the "contrast" message should say more about the opponent than his or her positions on certain issues. The message about the opposition should also be a story about choices and values – giving examples of times the opponent made choices that show him or her to be out of touch with the hopes and values of voters.

Note how Harry Teague's contrast messages talk about his opposition in terms of his profession and priorities.

> "As a business owner and the Chairman for the National Restaurant Association, [Ed] Tinsley has been looking to save a dime at the expense of his employees, opposing raises to the minimum wage."
>
> "Ed Tinsley is only working for the big shots. He's turned his back on middle-class families, and we can't afford to send him to Congress."

Issue contrast should be used primarily to demonstrate differences in values. Below is an example from President Obama's contrast message with Sen. McCain during the 2008 campaign.

> "If John McCain wants to have a debate about who has the temperament, and judgment, to serve as the next Commander-in-Chief, that's a debate I'm ready to have.
>
> "For while Senator McCain was turning his sights to Iraq just days after 9/11, I stood up and opposed this war, knowing that it would distract us from the real threats we face.
>
> "When John McCain said we could just "muddle through" in Afghanistan, I argued for more resources and more troops to finish the fight against the terrorists who actually attacked us on 9/11, and made clear that we must take out Osama bin Laden and his lieutenants if we have them in our sights.
>
> "John McCain likes to say that he'll follow bin Laden to the Gates of Hell - but he won't even go to the cave where he lives."

Once you develop your core narrative, the next step is to develop concrete messages derived from your core narrative that address specific issues, moments, or people.

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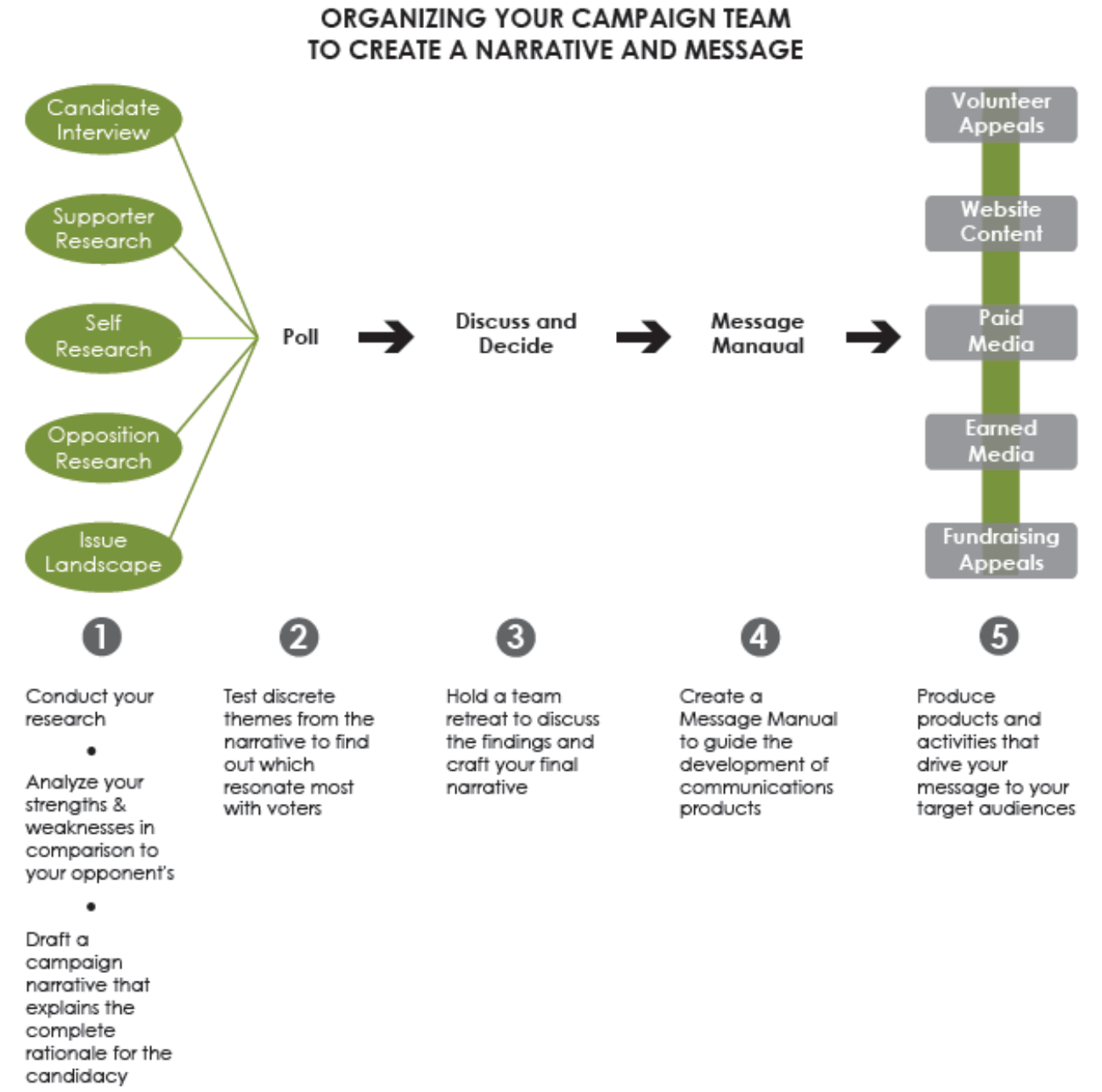
HOW ARE NARRATIVE AND MESSAGE DEVELOPED?



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Start with your candidate

Your campaign narrative must start with the candidate, her values, experiences, and reasons for running for office. A narrative that is not grounded in the candidate's values and that shifts with every poll is a narrative that voters will quickly dismiss as inauthentic. All messages on your campaign should be derived from and consistent with your core narrative.

Use your research

Use the supporter research, self research and opposition research laid out in the last chapter to inform the parts of your candidate's narrative that you emphasize most. Use this research to help you develop your campaign narrative about your supporters and the type of campaign you are running in contrast to your opponent.

Determine the best "positioning" for messages

Once you have all of your research together, you need to synthesize it so that you have messages to test in your poll. Based on the number of concepts you want to test with voters, you and your team will next craft discrete messages about each concept.

Below is a tool that will be helpful for boiling down the most relevant points from your research to analyze your candidate's positioning. You don't need to craft messages for this exercise, just identify the most important concepts. In the example below, we use the Harry Teague example from the narrative on previous pages.

The "US" column shows Harry Teague's positives and negatives, and the "THEM" column includes positives and negatives about his opponent. The goal with this exercise is to identify and stress your biggest strengths, and to identify and exploit your opponent's biggest vulnerabilities.

	US	**THEM**
US ON:	Raised in New Mexico Self-made Job creation	Lobbyist Doesn't live in district Not a "straight talker"
THEM ON:	No Washington experience Democrat	Successful businessman Conservative A Leader

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When your team has thoroughly discussed your positioning and populated the grid above, think about which elements combine to form the best contrast with the opponent. For example, Harry Teague's team thought his humble beginning in New Mexico contrasted well with his opponent's extravagant lifestyle and his time in DC lobbying against the interests of working-class people.

The next step is to craft a set of distinct messages that communicate the best contrasts in your grid. Once you have those messages drafted, you will be ready to test these messages through public opinion research.

Will our message work?

For the message to actually be used in word-of-mouth communication – which is critical to a strong engagement campaign – people must be able to *retain* and *repeat* it. These are criteria for you to keep in mind when evaluating a draft of the message:

Emotional

If people don't feel anything in response to your message, they won't remember it - much less be motivated by it. *Ask: Does our message create an emotional reaction?*

Authentic

Voters can spot a phony a mile away. It is important that the candidate comes across as genuine – and that starts with an authentic message. *Ask: Is the candidate passionate and convincing in delivering the message?*

Repeatable

Word-of-mouth only works if people will actually use the message in conversation. The language must use everyday words and phrases that the candidate and everyone involved with the campaign will remember and repeat. *Ask: Will people actually say the most important elements of the message to others?*

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Test messages with voters

If you are running a large-scale campaign reaching large numbers of voters, particularly if your electorate is demographically diverse, you will probably want to conduct public opinion research to help guide your message development.

There are many choices to make in the language you use for your message. Polling and focus groups with voters can help you focus your message on the most persuasive elements and develop effective language.

If you decide to conduct polls or focus groups, remember that they provide points of information in one moment in time. Your campaign should not contort itself to react to any one poll or focus group. Polls and focus groups help you refine your core narrative based on the candidate's values and beliefs. They are not a substitute for a strong sense of your candidate's core values and priorities.

You're ready to poll when the following tasks are completed:

Candidate interview
Supporter research
Self-research
Opposition research
Policy research
Positioning analysis
Narrative developed

What questions should my poll answer?

Here are some of the key questions your poll can help you address:

What are key positives about our candidate?
Key positives about our opponent?
Key negatives on our candidate?
Key negatives on our opponent?
Who are the persuadable voters?
What do they currently know/think about the candidates?
What hopes and concerns are most on their minds?
Which elements of my narrative do they find most persuasive (e.g., bio, values, issues, contrast)?
What are the best arguments to make against our opponent?
How do these voters obtain information and entertainment?

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Polling

We use polls to segment the electorate into groups of base, swing and opposition voters, as well as to test messages that persuade the undecided.

A "baseline" survey is conducted first to determine the level of name recognition, favorability ratings, key issues and other information that will tell you where the candidates stand at the beginning of the campaign, and which voters you need to persuade. If neither candidate has much name recognition and/or the race is a down-ballot race unlikely to be affected by mass media, you may not get much value out of a poll.

A poll can also be used to test messages and determine which messages motivate people's vote. This should be done prior to investing in mass media, so that you have some indication of which message concepts should be used in advertising and direct mail. The basic technique is to test a series of distinct statements, so that you can determine which elements of the message are the most motivating to voters. You should also test the opposition's message to see what resonates. This type of poll simulates the back-and-forth of a campaign – it helps you see how voters will react upon hearing messages from both sides.

The pollster should give you a read-out of the subgroups of voters that are most likely to change their position after hearing the messages. These subgroups will usually be presented in terms of basic demographic characteristics – gender, age, race, income level, ideological identification, and so forth. You can also ask about media habits to determine what types of TV and radio programming, websites and other media vehicles reach the voters you need to persuade. Remember that media habits are changing rapidly, and you need to ensure that your pollster has a good handle on trends in media consumption.

Polling can be expensive. To ensure that your research dollar is well spent, determine how each question will produce information that is actionable. Don't let anyone waste valuable real estate in a poll asking questions that are merely "interesting." *Ask: How will we actually use the finding from this question to make a decision?*

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Focus groups

Focus groups can be useful for exploring voters' attitudes, for hearing how voters talk to each other about the campaign (so you can capture and replicate word-of-mouth), and for testing message concepts, advertisements and direct mail. When done well, this type of "qualitative" research produces insights on the emotional dynamics of the campaign and how voters are likely to respond to campaign messages.

There are many tools and techniques that can be used in qualitative research. Be sure that your researchers explain their methodologies for probing voters' motivations and for systematically analyzing words and phrases that voters use to talk to each other.

In an exploratory focus group, the moderator needs to drive voters to discuss the campaign among themselves. A good technique is to have some participants try to convince others to vote for your candidate – hearing what they say can help you identify persuasive themes. If the moderator is not driving voters to talk to each other – but instead conducts what amounts to a series of one-on-one interviews – the focus group won't be as useful as it could be.

Review the discussion guide before the focus group – ask how each question contributes to message development and find out what techniques the moderator will use to elicit the information you want.

In a message or ad-testing focus group, the participants will see examples of draft messages, direct mail pieces, TV ads and other communications products. This can be a helpful way to determine if your message – and the way it is presented in paid media – packs an emotional punch. If the focus group is overly analytical and doesn't respond with any discernible emotion, your media is likely to fail.

Create a message manual for your campaign

A Message Manual is a good tool for training your entire team and providing them with core content so that they can produce communications materials efficiently. The manual should become a constant reference for your entire team – and a training tool for volunteers and supporters – so that the entire operation is skilled at delivering the campaign's core narrative and staying on message.

Your message will be used in many different formats, from the website to house parties, phone scripts, direct mail and TV commercials. At the end of this chapter, you'll find examples of the following from Felix Arroyo's campaign: Message Manual, campaign message and 30-second TV ad script.

Conclusion

Your campaign narrative provides the foundation and focus for the rest of your campaign. When things get tough it may be tempting to just run hot-headed into a fight. But your job as a manager is to ensure that the whole campaign holds firm to your candidate's core values and beliefs, come what may. All messages in your campaign should be grounded in and consistent with your core one-page campaign narrative.

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SAMPLE POSITION PAPER

Below is a sample position paper from Barack Obama's 2008 Presidential campaign.

Barack Obama's Plan to Strengthen the Economy

The Problem

Wages are Stagnant as Prices Rise: While wages remain flat, the costs of basic necessities are increasing. The cost of in-state college tuition has grown 35 percent over the past five years. Health care costs have risen four times faster than wages over the past six years. And the personal savings rate is now the lowest it's been since the Great Depression.

Tax Cuts for Wealthy Instead of Middle Class: The Bush tax cuts give those who earn over $1 million dollars a tax cut nearly 160 times greater than that received by middle-income Americans. At the same time, this administration has refused to tackle health care, education and housing in a manner that benefits the middle class.

Barack Obama and Joe Biden's Plan

Jumpstart the Economy

- **Enact a Windfall Profits Tax to Provide a $1,000 Emergency Energy Rebate to American Families:** Barack Obama and Joe Biden will enact a windfall profits tax on excessive oil company profits to give American families an immediate $1,000 emergency energy rebate to help families pay rising bills. This relief would be a down payment on the Obama-Biden long-term plan to provide middle-class families with at least $1,000 per year in permanent tax relief.
- **Provide $50 billion to Jumpstart the Economy and Prevent 1 Million Americans from Losing Their Jobs:** This relief would include a $25 billion State Growth Fund to prevent state and local cuts in health, education, housing, and heating assistance or counterproductive increases in property taxes, tolls or fees. The Obama-Biden relief plan will also include $25 billion in a Jobs and Growth Fund to prevent cutbacks in road and bridge maintenance and fund school re-pair - all to save more than 1 million jobs in danger of being cut.

Provide Middle Class Americans Tax Relief

Obama and Biden will cut income taxes by $1,000 for working families to offset the payroll tax they pay.

- **Provide a Tax Cut for Working Families:** Obama and Biden will restore fairness to the tax code and provide 150 million workers the tax relief they need. Obama and Biden will create a new "Making Work Pay" tax credit of up to $500 per person, or $1,000 per working family. The "Making Work Pay" tax credit will completely eliminate income taxes for 10 million Americans.
- **Eliminate Income Taxes for Seniors Making Less than $50,000:** Barack Obama will eliminate all income taxation of seniors making less than $50,000 per year. This proposal will eliminate income taxes for 7 million seniors and provide these seniors with an average savings of $1,400 each year. Under the Obama-Biden plan, 27 million American seniors will also not need to file an income tax return.

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SAMPLE POSITION PAPER, CONTINUED

- **Simplify Tax Filings for Middle Class Americans:** Obama and Biden will dramatically simplify tax filings so that millions of Americans will be able to do their taxes in less than five minutes. Obama and Biden will ensure that the IRS uses the information it already gets from banks and employers to give taxpayers the option of pre-filled tax forms to verify, sign and return. Experts estimate that the Obama-Biden proposal will save Americans up to 200 million total hours of work and aggravation and up to $2 billion in tax preparer fees.

Invest in the Manufacturing Sector and Create 5 Million New Green Jobs

- **Invest in our Next Generation Innovators and Job Creators:** Obama and Biden will create an Advanced Manufacturing Fund to identify and invest in the most compelling advanced manufacturing strategies. The Fund will have a peer-review selection and award process based on the Michigan 21st Century Jobs Fund, a state-level initiative that has awarded over $125 million to Michigan businesses with the most innovative proposals to create new products and new jobs in the state.
- **Double Funding for the Manufacturing Extension Partnership:** The Manufacturing Extension Partnership (MEP) works with manufacturers across the country to improve efficiency, implement new technology and strengthen company growth. This highly-successful program has engaged in more than 350,000 projects across the country and in 2006 alone, helped create and protect over 50,000 jobs. But despite this success, funding for MEP has been slashed by the Bush administration. Barack Obama and Joe Biden will double funding for the MEP so its training centers can continue to bolster the competitiveness of U.S. manufacturers.
- **Invest In A Clean Energy Economy And Create 5 Million New Green Jobs:** Obama and Biden will invest $150 billion over 10 years to advance the next generation of biofuels and fuel infrastructure, accelerate the commercialization of plug-in hybrids, promote development of commercial scale renewable energy, invest in low emissions coal plants, and begin transition to a new digital electricity grid. The plan will also invest in America's highly-skilled manufacturing workforce and manufacturing centers to ensure that American workers have the skills and tools they need to pioneer the first wave of green technologies that will be in high demand throughout the world.
- **Create New Job Training Programs for Clean Technologies:** The Obama-Biden plan will increase funding for federal workforce training programs and direct these programs to incorporate green technologies training, such as advanced manufacturing and weatherization training, into their efforts to help Americans find and retain stable, high-paying jobs. Obama and Biden will also create an energy-focused youth jobs program to invest in disconnected and disadvantaged youth.
- **Boost the Renewable Energy Sector and Create New Jobs:** The Obama-Biden plan will create new federal policies, and expand existing ones, that have been proven to create new American jobs. Obama and Biden will create a federal Renewable Portfolio Standard (RPS) that will require 25 percent of American electricity be derived from renewable sources by 2025, which has the potential to create hundreds of thousands of new jobs on its own. Obama and Biden will also extend the Production Tax Credit, a credit used successfully by American farmers and investors to increase renewable energy production and create new local jobs.

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BY-NC-SA

SAMPLE POSITION PAPER, CONTINUED

- **Technology, Innovation and Creating Jobs:** Barack Obama and Joe Biden will increase federal support for research, technology and innovation for companies and universities so that American families can lead the world in creating new advanced jobs and products.
- **Invest in the Sciences:** Barack Obama and Joe Biden support doubling federal funding for basic research and changing the posture of our federal government from being one of the most anti-science administrations in American history to one that embraces science and technology. This will foster home-grown innovation, help ensure the competitiveness of US technology-based businesses, and ensure that 21st century jobs can and will grow in America.
- **Make the Research and Development Tax Credit Permanent:** Barack Obama and Joe Biden want investments in a skilled research and development workforce and technology infrastructure to be supported here in America so that American workers and communities will benefit. Obama and Biden want to make the Research and Development tax credit permanent so that firms can rely on it when making decisions to invest in domestic R&D over multi-year timeframes.
- **Deploy Next-Generation Broadband:** Barack Obama and Joe Biden believe we can get broadband to every community in America through a combination of reform of the Universal Service Fund, better use of the nation's wireless spectrum, promotion of next-generation facilities, technologies and applications, and new tax and loan incentives.

Support Small Business

- **Provide Tax Relief for Small Businesses and Start Up Companies:** Barack Obama and Joe Biden will eliminate all capital gains taxes on start-up and small businesses to encourage innovation and job creation. Obama and Biden will also support small business owners by providing a $500 "Making Work Pay" tax credit to almost every worker in America. Self-employed small business owners pay both the employee and the employer side of the payroll tax, and this measure will reduce the burdens of this double taxation.
- **Create a National Network of Public-Private Business Incubators:** Barack Obama and Joe Biden will support entrepreneurship and spur job growth by creating a national network of public-private business incubators. Business incubators facilitate the critical work of entrepreneurs in creating start-up companies. Obama and Biden will invest $250 million per year to increase the number and size of incubators in disadvantaged communities throughout the country.

Labor

Obama and Biden will strengthen the ability of workers to organize unions. He will fight for passage of the Employee Free Choice Act. Obama and Biden will ensure that his labor appointees support workers' rights and will work to ban the permanent replacement of striking workers. Obama and Biden will also increase the minimum wage and index it to inflation to ensure it rises every year.

- **Ensure Freedom to Unionize:** Obama and Biden believe that workers should have the freedom to choose whether to join a union without harassment or intimidation from their employers. Obama cosponsored and is strong advocate for the Employee Free Choice Act, a bipartisan effort to assure that workers can exercise their right to organize. He will continue to fight for EFCA's passage and sign it into law.

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BY-NC-SA

SAMPLE POSITION PAPER, CONTINUED

- **Fight Attacks on Workers' Right to Organize:** Obama has fought the Bush National Labor Relations Board (NLRB) efforts to strip workers of their right to organize. He is a cosponsor of legislation to overturn the NLRB's "Kentucky River" decisions classifying hundreds of thousands of nurses, construction, and professional workers as "supervisors" who are not protected by federal labor laws.
- **Protect Striking Workers:** Obama and Biden support the right of workers to bargain collectively and strike if necessary. They will work to ban the permanent replacement of striking workers, so workers can stand up for themselves without worrying about losing their livelihoods.
- **Raise the Minimum Wage:** Barack Obama and Joe Biden will raise the minimum wage, index it to inflation and increase the Earned Income Tax Credit to make sure that full-time workers earn a living wage that allows them to raise their families and pay for basic needs.

Protect Homeownership and Crack Down on Mortgage Fraud

Obama and Biden will crack down on fraudulent brokers and lenders. They will also make sure homebuyers have honest and complete information about their mortgage options, and they will give a tax credit to all middle-class homeowners.

- **Create a Universal Mortgage Credit:** Obama and Biden will create a 10 percent universal mortgage credit to provide homeowners who do not itemize tax relief. This credit will provide an average of $500 to 10 million homeowners, the majority of whom earn less than $50,000 per year.
- **Ensure More Accountability in the Subprime Mortgage Industry:** Obama has been closely monitoring the subprime mortgage situation for years, and introduced comprehensive legislation over a year ago to fight mortgage fraud and protect consumers against abusive lending practices. Obama's STOP FRAUD Act provides the first federal definition of mortgage fraud, increases funding for federal and state law enforcement programs, creates new criminal penalties for mortgage professionals found guilty of fraud, and requires industry insiders to report suspicious activity.
- **Mandate Accurate Loan Disclosure:** Obama and Biden will create a Homeowner Obligation Made Explicit (HOME) score, which will provide potential borrowers with a simplified, standardized borrower metric (similar to APR) for home mortgages. The HOME score will allow individuals to easily compare various mortgage products and understand the full cost of the loan.
- **Close Bankruptcy Loophole for Mortgage Companies:** Obama and Biden will work to eliminate the provision that prevents bankruptcy courts from modifying an individual's mortgage payments. They believe that the subprime mortgage industry, which has engaged in dangerous and sometimes unscrupulous business practices, should not be shielded by outdated federal law.

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BY-NC-SA

SAMPLE POSITION PAPER, CONTINUED

Barack Obama's Record

- **Housing:** In the U.S. Senate, Obama introduced the STOP FRAUD Act to increase penalties for mortgage fraud and provide more protections for low-income homebuyers, well before the current subprime crisis began.
- **Predatory Lending:** In the Illinois State Senate, Obama called attention to predatory lending issues. Obama sponsored legislation to combat predatory payday loans, and he also was credited with lobbying the state to more closely regulate some of the most egregious predatory lending practices.
- **American Jobs:** Barack Obama introduced the Patriot Employer Act of 2007 to provide a tax credit to companies that maintain or increase the number of full-time workers in America relative to those outside the US; maintain their corporate headquarters in America; pay decent wages; prepare workers for retirement; provide health insurance; and support employees who serve in the military.

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SAMPLE MESSAGE MANUAL

Message Manual: Contents

I. The Campaign Message. This section provides an overview of this campaign's guiding principles and values that will help Felix work to make Boston a better city. It incorporates key elements that resonate best with voters and sets Felix apart from the other candidates running for City Council At-large.

II. One-Minute Message. This brief message, meant to be delivered verbally, can be used when engaging voters on the streets or at their doors. It highlights Felix's history and priorities and explains why you are a part of this campaign.

III. Boilerplate. This section succinctly describes our vision for change and our campaign priorities. This language can be used in written materials and serves as a guide to the important themes that should be included in all of our communications.

The Campaign Message

Let's Build a Better Boston

Everyone should have a voice in their government and live in a neighborhood they are proud to call home. But too many people feel their voices are not heard and are concerned about their communities – people are losing their jobs, don't feel safe in their neighborhoods, and worry about the quality of their children's education.

Let's build a better Boston – where everyone's voice is heard and where people work together to strengthen their communities.

Felix Arroyo was raised in a family of teachers, who taught him that everyone has something to give. Both of his parents were teachers, and his wife teaches in a public school.

That's why he chose to become a community organizer. He currently works as a healthcare organizer and worked at SEIU as a labor organizer where he helped people get good jobs with fair wages.

Felix practices what he calls "collaborative politics" – bringing people together to make their voices heard and their communities better. His campaign is bringing together people from all walks of life across the city – people who believe that, working together, we can build a better Boston for everyone.

If elected to the City Council, he will work to create a level playing field so that everyone has access to their government – and keep working with people from the community to create more jobs, safer streets, and better schools.

Join our campaign – you'll have fun and make a difference. Let's build a better Boston together.

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SAMPLE MESSAGE MANUAL, CONTINUED

One-Minute Message

I'm supporting Felix because he works hard with people to get things done. He is an experienced community organizer – he works as a healthcare organizer to make sure that everyone has affordable health insurance and he worked as a labor organizer to help people get good jobs.

He comes from a family committed to public service. His mother is a Boston public school teacher and his father was a Boston City Councilor. His grandfather was a police officer.

His priorities are to level the playing field so that everyone has access to their government and create more jobs, safer streets, and better schools.

He knows how to inspire people to get involved and make it happen.

Boilerplate Language

Let's Build a Better Boston

Everyone should have a voice in their government and live in a neighborhood they are proud to call home.

Felix Arroyo is a candidate for Boston City Council At-large. He is an experienced community organizer who works hard with people to get things done. He is a life-long Bostonian raised in a family committed to public service – his mother is a Boston public school teacher and his father is a former Boston City Councilor. His grandfather was a police officer.

His priorities are to level the playing field so that everyone has access to their government and create more jobs, safer streets, and better schools.

Join our campaign – you'll be inspired to get involved and feel as hopeful as we do that we can make our neighborhoods better!

Continued on next page –>>

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30-Second Ad Script:

I was raised in a family of teachers.

Raised to believe every child, every person, has something to give.

I was raised in a strong community. Where people pitched in to help out.

I believe everyone has the right to live in a neighborhood they're proud to call home.

That everyone's voice should be heard.

That by bringing people together, we can create the change we want.

That's how I was raised. It's how I've lived my life.

It's how we'll build a better Boston.

Website

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Chapter 5

SETTING GOALS

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CHAPTER 5:
SETTING GOALS

INTRODUCTION

Before you can develop strategies for each department, you need to set your overall campaign goals so that all departments are working toward the same purpose. Remember, it all comes down to votes. Every department and every person on your campaign should be focused exclusively on work that delivers votes.

ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy				
Message Strategy				
Mobilization Strategy				
Management Strategy				

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SETTING STRATEGIC GOALS

A central part of planning strategy is setting clear, measurable goals for each major work stream in your campaign. You'll need to set goals for votes turned out, money raised, media coverage earned, voters IDed and volunteers recruited.

When you set clear goals you can delegate the work it takes to meet those goals to other members of your team—staff, volunteers and consultants. Without goals the work will continue to fall back on you.

In their book, *Managing to Change the World*, Jerry Hauser and Alison Green describe SMART goals, which in the campaign context look like this:

Strategic	Strategic goals reflect the most important work that needs to get done, like raising money, getting media coverage, recruiting volunteers and delivering votes. These goals need to be aligned at every level of your campaign. Individual staff goals should add up to department goals, and department goals should add up to campaign goals.
Measurable	Measurable goals create a clear finish line, a way to judge whether or not the goal has been reached. Measurable goals also allow you to see progress over time, to evaluate tactics and improve.
Ambitious	Ambitious goals represent the significant work it will take to win. They are based not on what you *could* do with what you have now, but on what you *have to do* in order to win.
Realistic	Realistic goals include a feasible plan for how to get from where you are to where you need to be.
Time-bound	Time-bound goals include not just a clear finish line, but also a clear deadline for reaching them. They also include clear benchmarks along the way to measure progress to goals. When setting milestones take into account that growth is hardly ever even over time. It usually starts slow, picks up after some early learning, and explodes close to the finish line. Your milestones should reflect that.

*Adapted with permission from Alison Green, Jerry Hauser, *Managing To Change the World*

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AMBITIOUS VS. REALISTIC GOALS

For the goals you set to be taken seriously, they need to be right at the intersection of ambitious and realistic, which is more art than science.

For example, you might be just ambitious and say we know we'd win if we raised $5 million for this election. Or you could just be realistic and say the last campaign here was $1million, so let's raise that. But setting a SMART goal means stretching your whole campaign, while keeping the finish line in sight. That means you might say our goal is to raise $1.8 million so we can meet the success of the last campaign here AND stretch our reach to more voters.

Goals vs. Metrics (Outcomes vs. Activities)

Goals measure consequential outcomes—the ultimate work that needs to get done to win your campaign. The goal you give a staff person is what you're asking that person ***to achieve*** over a long period of their work.

Metrics track the activities that staff and volunteers engage in day to day. Metrics track what you are asking staff ***to do***. Metrics are not an end in themselves, but a way to help you, your staff and volunteers decide routinely which activities are best helping you meet your overall campaign goals so you can re-strategize over time.

It is critical that your staff and volunteers know BOTH the ultimate consequential goal they are working toward and the tactical metrics.

Often campaigns make the mistake of giving an organizer only tactical outcomes, like "you're responsible for 500 calls a day." But what if knocking 250 doors a day with their volunteers produces more positive IDs than 500 calls? Without knowing how many votes and supporters they're responsible for, organizers can't evaluate whether or not their tactics are actually helping them get closer to winning the campaign.

Only having tactical goals is also demoralizing. When an organizer is only tracking the number of calls he and his volunteers are making, it's easy to feel like he's calling into oblivion without a clear sense of whether his work is achieving what it's supposed to achieve. If he is also tracking progress toward his overall campaign goal of finding X supporters, he can see himself getting closer to meeting his goal over time and will be motivated to make even more calls.

On the next page you'll find some sample metrics and goals common to many electoral campaigns.

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	METRICS (input) →	METRICS (output) →	GOALS (outcomes)
Votes	# calls # door knocks # voter contacts	# ID'd supporters # ID'd undecided	3,469 Votes for our candidate in Turf X

Money	# call time hours
	# contacts per hour
	# donor meetings
	# of event hosts
	# of resolicit mailings
	# fundraising emails sent
		$ raised per call time hour
		$ donated online
		# large donors
		# small donors
			$ 1.8 million raised

Message	# press events # pitch calls # Letter to the Editor commits	# reporters who show up # LTEs submitted	7 Stories covered per market 5 LTEs published/week
Volunteers	# recruitment calls # house meetings # scheduled voter contact activities	# organizational meeting or house meeting attendees # vol. signups at meetings	68 Active Volunteers
Volunteer Leaders	# one-to-ones # volunteer trainings # volunteer tests scheduled	# of volunteers trained	12 Trained, Tested Volunteer Leaders

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Creating a clear chart of goals and metrics from the get go makes it possible for you to be clear with your staff about where they're going and how they might get there. If they are not meeting goals, measuring key input and output metrics allows you to go back and figure out why goals are not being met.

For example, if your press team is not getting sufficient coverage at earned media events, you can go back and see if they had reporters showing up. If they didn't have reporters at the events, you can go back and see how many pitch calls they made.

If your candidate is not raising enough in call time, then you need to sit down with her and look at how many calls per hour she's making, how much is being raised on each call, and come up with a strategy for doing better.

If your field staff aren't recruiting enough volunteers, you can see if they're putting enough work into recruitment calls. If they're putting the calls in but not getting volunteers, then you'll need to work together to re-strategize and come up with new ways of recruiting volunteers.

The goals shouldn't change. They are the strategic goals you believe it will take to win. If goals aren't being met, it's not the goals that should change but the tactical input activities.

The best campaign staff are those who can carefully track and constantly adapt their input activities and outcomes in order to meet goals.

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SETTING VOTE GOALS

Your campaign is all about winning votes, so the most important goals you will set are your turnout projection and vote goal. To figure out your campaign vote goal you need to answer the following questions about your voters:

How many?
w**H**o?
w**H**ere?
w**H**en?
How?

HOW MANY?

Estimate expected turnout in this election

The single most important factor to consider when estimating turnout is historical turnout. Take turnout from three recent past similar elections and take the average. "Similar elections" means Presidential vs. Congressional vs. off cycle or primary. From there, add to or subtract from your turnout *modestly* based on other circumstances which may be unique to your election:

- **Heat of the race.** Is the race very competitive? Is there a larger national narrative impacting your race?

- **Political context.** How hot is the race at the top of the ticket? If your race is not at the top of the ticket, what is the typical undervote for your race? Are there any ballot initiatives or hot-button issues at play? Does your candidate or your opponent motivate any particular constituencies?

- **Resources.** Is the race targeted by any national party committees or independent expenditures that would push out more voters?

- **District dynamics:** Have there been pronounced demographic changes in the district? Was there any recent redistricting?

- **Voting Laws:** Are there any recent changes to voting laws such as Voter ID, Early Vote, or Election Day Registration (EDR)? Voting laws can have a large impact on turnout. Research shows that Voter ID laws can reduce turnout by about 2 points, Early Vote can actually also *reduce* overall turnout slightly, and EDR can increase turnout by about 5 points.

Be specific, how many total voters do you expect to turn out?

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Calculate your vote goal

The vote goal equals expected turnout multiplied by the percentage of the vote required to win. In a 2-way race, the win number is 50% plus 1 vote. To be safe, you should also build in a 2-5% cushion. So:

Vote Goal = Expected Turnout X 52%

Based on your turnout assumptions how many votes will it take to win?

WHO?

Once you've determined how many votes you'll need to win, you need to determine who is going to actually cast those votes. Creating your vote goal scenario is an art as much as a science. The best campaign managers know exactly where the votes are coming from; don't leave this to your vendors or consultants to figure out on their own. Use all the resources at your disposal including a healthy serving of counts from the voter file along with any modeling or targeting resources that you can get your hands on.

TURNOUT HISTORY	PRESUMED SUPPORT: LOW	UNKNOWN		HIGH
HIGH	X	X	High Turnout Persuasion	High Turnout Base
SPORADIC	X	X	Sporadic Turnout Persuasion	Sporadic Turnout Base
NEVER VOTE	X	X		X
NEW	X	X		New Registrants Base

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The table on the previous page is sometimes known as a targeting matrix and is one way to visualize your vote goal scenario. Some segments, such as the base for your opponent, are never going to be fruitful targets for your voter contact resources. Others, such as those voters who do not belong to the base of either candidate, need to be investigated further in order to determine who among them may be receptive to persuasion and who is simply a shot in the dark.

Each square in the table represents a universe of individual voters that you can describe with demographic information like race/ethnicity, gender, age, as well as past voting history, party affiliation and other information we may have about them on the voter file. Since every campaign is unique, you need to figure out how to define each box in this table for your own candidate.

The first step in figuring out who your voters are is to describe each universe both qualitatively and quantitatively. For example, "There are X voters in our High Turnout Base universe. These voters voted in 2 of the last 2 similar elections, and in at least 1 of the last 3 primaries for our party." Use the table on t he next page to describe every voter universe for your candidate.

Once you've described each universe and calculated the total number of voters in that universe, you'll need to figure out what percentage of those voters are likely to support your candidate and what percentage are likely to turn out. **Your vote goal scenario is how you expect to bridge the gap between your high turnout base and your vote goal—it's the work that has to get done by your campaign.**

Even in an ideal world, not every single person in your high turnout base will actually vote, and not every single one of them will vote for your candidate. **Your vote goal scenario needs to be based on the number of people you expect to actually vote, not based on the total number of people in every universe.**

Once you've assembled your preliminary vote goal scenario, it may not add up to your vote goal. This is when you need to make some decisions about resource allocation. Are you going to invest more in persuasion (and increase the percentage of persuasion targets who are going to vote your way), invest more in turnout (and increase the percentage of sporadic voters who actually vote), or invest more in voter registration? Every time you boost a percentage in your scenario, it means a real world investment in organizing needs to be made.

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HOW WILL YOU REACH YOUR VOTE GOAL?

Universe	Strategy	Description	Total Voters	Projected Support	Projected Turnout	Votes ★
High Turnout Base	Engage as Volunteers	_____	X	Y%	Z%	X * Y% * Z%
Sporadic Turnout Base	Motivate & Turn Out	_____	X	Y%	Z%	X * Y% * Z%
High Turnout Persuasion	Persuade	_____	X	Y%	Z%	X * Y% * Z%
Sporadic Turnout Persuasion	Persuade & Turn Out	_____	X	Y%	Z%	X * Y% * Z%
New Registrant Base	Register & Turn Out	_____	X	Y%	Z%	X * Y% * Z%
YOUR VOTE GOAL	[redacted]					

YOUR VOTE GAP

Your vote gap is the difference between your Vote Goal and your High Turnout Base.

Your Vote Gap represents the work your campaign has to do on persuasion, voter turnout and voter registration. The strategy you develop in Chapter 6 will be a strategy to use the resources you have to fill your vote gap by Election Day.

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HERE?

Knowing where you'll find your votes geographically is central to many strategic decisions you'll make on the campaign, especially candidate appearances, organizer assignments, and events.

Running counts by precinct, city and county is helpful to get a geographic sense of base areas where you may need to focus your turnout and registration efforts. It may also give you a sense of the swing areas where you may need to focus your persuasion efforts. The best scenario, if you have the expertise in-house, is mapping these elements and creating "heat maps" which visually represent the political reality of your district.

WHEN & HOW?

Based on past elections, when will people vote? How many do you expect to Vote By Mail? During each day of Early Vote? On Election Day?

Put your vote turnout goals on your timeline. Knowing when and how people have voted in past elections will determine a great deal of your GOTV strategy down the road.

Based on when you expect people to vote, what are your goals for reaching voters?

MAP OUT YOUR GOALS OVER TIME AND SPACE

Set campaign-wide benchmarks

Put your Supporter ID goals and Voter Turnout goals on a timeline with peaks around your major milestones. For example:

--25% to our targeted ID goal by September 1
--60% to our targeted ID goal by October 1
--95% to our targeted ID goal by November 1

--20% of our voters turned out through Vote By Mail and Early Vote by Oct. 15
--50% of our voters turned out through Vote By Mail and Early Vote by November 1

--50% of volunteer leaders and volunteers trained by Sept. 1
--80% of volunteer leaders and volunteers trained by Oct. 1
--100% of volunteer leaders and volunteers trained by Nov. 1

Create a clear precinct-level goals spreadsheet

Run counts on each of your universes for each precinct in your turf. How many of your vote goal scenario targets (persuasion + sporadic base voters + potential new registrants) live in each precinct? Use those numbers to help you develop your ID goal for each precinct. Your ID goal will equal some percent of your targeted universe, depending on how many you expect to vote and how many of those who vote you expect to support your candidate. Your ID and vote goals are critical for building your Engagement Campaign, so that Organizers and volunteer leaders have clear, measurable goals to meet over time.

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CONCLUSION

Once you have your vote goal, you should not change it lightly. It is particularly important for your Organizers and volunteers to understand how many supporters they will have to identify and turn out by Election Day. Keeping that goal steady gives them traction over time.

While your actual vote goals should remain fairly stable, you will constantly adjust your vote goal scenario and your targeted universes as you get new information about who supports your candidate and restrategize to figure out how best to meet your vote goal.

For example, early in the campaign your "High Turnout Base" universe may be conservatively small. But as your candidate shores up her base, you may add voters to that universe—people you are certain will support your candidate and turn out to vote without you doing anything. Or, if your opponent goes on the offense and puts some serious dents in your campaign, you may need to move people out of your High Turnout Base universe and into "High Turnout Persuasion," expanding your targets for persuasion.

Basically your job is not just to set goals, but also to instill a culture in your campaign of remaining steady and focused on overall goals, but flexible on tactics for reaching those goals.

When you develop your strategy further in Chapter 6, you will need to set program goals for each major department in your campaign.

Setting SMART goals takes practice, but taking time to do it well will help create that deliberate culture of excellence and learning that defines strong campaigns.

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Chapter 6

DEVELOPING YOUR STRATEGY

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CHAPTER 6:
DEVELOPING YOUR STRATEGY

INTRODUCTION

Your primary job as a Campaign Manager is to build a winning team and engage them in developing a winning strategy for your candidate's campaign. If you try to develop this strategy by yourself in a closet somewhere it will be limited by your own experience and perspective. Strategizing is at its best a collaborative process. Before you even launch into this chapter ask yourself, "who should be creating this strategy with me?" And, "how will we re-strategize together day to day and week to week?" Once you've gathered these folks don't waste any time getting started!

The early stages of your campaign—when you lay out your plan and begin engaging staff and volunteers—are the most likely to determine success in an Engagement Campaign. In the early phases of the campaign, when there are fewer external demands, the tendency may be to feel like you are waiting for the real action to begin.

Campaigns that coast through this period are more likely to be disorganized, reactive, have fewer resources and be less prepared for the rough and tumble of the campaign ahead. Campaigns that seize this time to lay a solid foundation will be better prepared, act with more purpose, and have more resources and flexibility to respond to the demands of the campaign.

This chapter walks you through using the Engagement Campaign Strategy Chart to develop your campaign plan and program. Each strategy row—Mobilization, Message and Money—can be delegated to the appropriate department of your campaign, but not until you have set campaign-wide goals and major goals for each department, so you're sure that your campaign will be operating in an integrated way. New Media, Data and Technology cross over all departments and functions of a campaign.

Each column in the strategy chart represents a chunk of time. To begin, just figure out the big chunks—what's happening in each phase and what the key goals are based on the vote goal and targeting matrix you developed in the last chapter. Then, as you get closer to a phase, you can divide the column up into smaller chunks of time—weeks, days, or even hours on Election Day.

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What is a program?

Your campaign program is the tactical plan for turning your strategy into actionable priorities that will turn your resources into capacity to win. A program is made up of goals and activities executed by staff and volunteers that will produce the results required to meet your major mobilization, message and money goals in each phase.

A well developed program helps you to:

- ☐ MEET GOALS: Invest the resources of the people and money you have now wisely in order to attract more supporters, volunteers and money.
- ☐ BUILD MONEY CAPACITY: Turn supporters into donors, donors into repeat donors, and repeat donors into volunteer raisers.
- ☐ BUILD MESSAGE CAPACITY: Get consistency and resonance across multiple channels, including field, earned media, paid media, and new media.
- ☐ BUILD MOBILIZATION CAPACITY: Turn supporters into trained, tested volunteers; volunteers into volunteer leaders; and volunteer leaders into volunteer organizers and recruiters. Turn website visitors or event attendees into supporters and volunteer prospects.

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ARTICULATING YOUR STRATEGY

The basic question of strategy is: how can you turn what you have (strengths and opportunities) into what you need (to overcome your weaknesses and threats), in order to win?

Based on the work of earlier chapters you already have the materials to articulate your core campaign strategy. Look at your landscape assessment, research, timeline and goals for a start.

For example:

> "We need to get X votes by Y date to win. [YOUR VOTE GOAL]
>
> "We expect to have strong support among young voters because of our work on education, among progressive women because our candidate is a young woman, and among people who turned out to vote in our party primary. However, some of the people we expect to support us vote infrequently so we will have to motivate them to turn out. At the same time there are frequent voters who are Independent women, Latinos and seniors that we will have to work to persuade to support our candidate. [YOUR TARGETING MATRIX]
>
> "We expect that our persuasion message will work best in the suburbs of X City, and that our mobilization efforts will be strongest in the urban regions. [YOUR UNIVERSES MAPPED GEOGRAPHICALLY]
>
> "In order to motivate our base and persuade undecided voters, we will start early by engaging our supporters, and recruiting them to become volunteers who do fundraising, voter contact and earned and social media." [YOUR TIMELINE]

You and your key leaders in the campaign will have to tell the story of your strategy over and over again so that all staff and volunteers are very clear about how to focus and target their efforts, and so they know if they're talking with the right people at the right time.

Once you can articulate your overall campaign strategy the next step is to start breaking it down into departmental goals and supporting your core staff or volunteer leaders in building strategies around those goals. Your job as manager is not to develop the whole money plan, message plan and mobilization plan by yourself, but to support your Finance Director, Communications Director and Field Director in creating these plans so that they own the goals, the strategy and the program.

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DEVELOPING YOUR MONEY STRATEGY

ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy • **Call Time** • **Raisers** • **Events** • **Online** • **PACs**				
Message Strategy				
Mobilization Strategy				
Management Strategy				

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The Finance Plan

You developed your budget—your spending strategy—in Chapter 2. The flip side of the budget is the finance plan, which is your campaign's strategy for raising the money you'll have to spend.

It is the Finance Director's job to create the details of how the campaign money will be raised, but as the manager you should work with the Finance Director to lay out the general finance strategy based on the assessment and research you conducted earlier. This is critical so that you are fully aware of the demands that fundraising will place on campaign resources: the amount of candidate time required for fundraising, the amount of money it takes to set up and maintain each revenue stream, and the amount of staff time needed to bring in contributions.

Set basic quarterly goals

Campaign contributions will not come in evenly over the course of the campaign. If you divide the time you have left before Election Day into quarters, the money will arrive (in general) at this pace:

1st Q	20-25%
2nd Q	10-15%
3rd Q	10-15%
4th Q	45-55%

This will vary greatly depending on whether your candidate is an incumbent, challenger or running for an open seat. Also, there will generally be a slight bump in donations immediately following the primary election.

Create a revenue strategy to meet your goals

There are five main revenue streams that your team will use to raise money for the campaign. All candidates need to do regular call time. Beyond that the balance of activity and emphasis for raising will depend on your campaign's strengths and weaknesses, opportunities and threats.

1. **Candidate call time**

   This is by far the most cost effective way for your campaign to raise money. The response rate is generally high because the candidate herself is calling, and the cost ratio is low. Since call time takes a lot of the candidate's time, it should be used for high dollar donors and for asking people to join your team of volunteer raisers. This is also a great tool for raising money quickly if you have a way to collect credit card contributions.

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2. One-on-one Meetings

Having the candidate meet with individuals in one-on-one meetings is the single most cost-effective way to raise money. It is very difficult to say "no" when the candidate is sitting in front of you. Unfortunately, the amount of candidate time needed (between driving to the location and the meeting itself) is significant so these meetings should be reserved for prospecting the highest level of donors and for those that can raise money for the campaign.

3. Volunteer Raisers

The candidate should start building a strong team of raisers immediately. A strong raising team is one whose members will themselves give early, and work to help raise early funds from others. These individuals must be willing to ask ***their*** social networks, family and close personal colleagues for campaign contributions. In these tough economic times, the new power bases in fundraising are those who can bring new money into the campaign rather than those who can simply give the maximum amount themselves.

4. Events

Fundraising events have a lower response rate than candidate call time, but can be used for donors of all levels. The key to a successful event is keeping the cost under control. An event should cost only 10-20% of the amount raised. Also, know that the contributions raised through an event do not come in immediately, so it's not the tool to use if the campaign needs money quickly.

5. Online Raising

Online solicitations have a low (around 1%) response rate. However, it costs almost nothing, and contributions can be collected much more quickly than other methods of raising. Online fundraising works best when it's in the context of the campaign message, takes advantage of opportunistic moments, is driven by deadlines, and provides a compelling theory about how the money will change the race—for example by funding a specific ad, or by allowing you to hire more neighborhood organizers.

6. Political Action Committees

Political Action Committees (PACs) can usually write bigger checks. Two things to consider when raising money from these organizations: 1) what is the process for getting a contribution (there may be questionnaires and/or interviews involved), and 2) if you are a challenger or running for an open seat, many of these checks will come later in the campaign when you begin to show your viability and path to victory.

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7. Direct Mail

Direct mail is a very expensive way to raise money on short campaigns. Initially you will probably only raise as much as you actually spend on the first mailing, so the campaign needs to have time to make money from this investment through re-solicitation. Also, as with events, it takes about 4-6 weeks for these contributions to come in. If you're going to try direct mail, use a targeted list and message, track your results and evaluate before you do it again.

8. House Parties

Contributions brought in through house parties are also generally small unless those events are being organized in a disciplined and intentional way by your best raisers. Neither the candidate nor the finance director should spend their time organizing these activities, but these events are a good way to have the finance and field staffs work together and they can serve as opportunities for volunteer raisers to reach their goals. These donors can provide a base of small contributors that give multiple times through re-solicitation. Don't underestimate the power of small donors investing in your campaign.

Tool Efficiency

Tool	Response Rate	Donor level	Donor Type	Who solicits	Time		Cost Ratio	Cash flow
					Cand.	Staff		
Face-to-face	50-70%	H	Individual & PAC	Candidate & Surrogate	H	H	1-5%	1-2 days
Telephone	30-50%	M-H	Individual & PAC	Candidate & Surrogate	H	H	1%	5-7 days
Events	15-25%	ALL	Individual & PAC	Surrogate & Staff	M	H	10-25%	4 weeks
Cold prospect mail	1%	L	Individual	Staff	L	M	100%	6 weeks
Resolicitation Mail	5-10%	ALL	Individual	Staff	L	M	10-15%	6 weeks
Cold prospect telemarketing	4-20%	L	Individual	Consultant	L	M	100%	1-4 weeks
Resolicitation telemarketing	30-50%	L	Individual	Consultant	L	M	35%	1-4 weeks
Internet prospect	1% or less	L-M	Individual	Candidate & Surrogate	L	M	1%	72 hours
Internet resolicit	1-5%	L-M	Individual	Candidate & Surrogate	L	M-L	1%	72 hours

(Source: EMILY's List)

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Put your revenue strategy on a timeline

Here is what a sample finance plan from your Finance Director might look like:

	31-Dec	31-Mar	30-Jun	30-Sep	15-Nov	TOTAL
Call time	$150,000	$80,000	$80,000	$150,000	$75,000	**$385,000**
Raisers	$67,200	$52,800	$52,800	$75,000	$65,000	**$237,800**
Events	$50,000	$60,000	$60,000	$85,000	$35,000	**$205,000**
Direct mail	$10,000	$10,000	$10,000	$15,000	$10,000	**$40,000**
Online appeals	$18,000	$10,000	$10,000	$10,000	$25,000	**$63,000**
PACs	$55,000	$25,000	$25,000	$75,000	$25,000	**$130,000**
Grassroots	$0	$8,000	$8,000	$10,000	$5,000	**$21,000**
raised	**$350,200**	**$245,800**	**$245,800**	**$420,000**	**$240,000**	
TOTAL RAISED	**$350,200**	**$596,000**	**$841,800**	**$1,261,800**	**$1,501,800**	

Within each quarter, most of the money will come in as government report deadlines approach because the deadlines create a sense of urgency. However, you can create urgency between deadlines by lining up key raising deadlines with your major milestones (like your campaign kickoff, your first campaign-wide canvass, and your first day up on TV).

As with the budget, your campaign should have a high and low version of the finance plan that will be fine-tuned as the campaign progresses.

This finance plan is a living document. The goals should not change, but the strategy for meeting goals should be flexible as you learn over time which strategies and tactics work best for raising money with your candidate.

Create a Donor Cultivation Strategy

Once you have a finance plan in place you need a donor cultivation strategy. Remember, money doesn't grow on trees—it comes from your supporters. So your finance strategy needs also to be an organizing strategy.

People make contributions to political campaigns at different times during the campaign and for various reasons. Early in the campaign, the candidate needs to reach out to friends, family and close personal colleagues to raise funds. This group of people contributes because the candidate has a personal relationship with each of them. Regardless of the candidate's ideology or viability, these folks want the candidate to win and will contribute to help in that effort.

Another group of individuals that will support the candidate early on are those that care deeply about the candidate's views on the issues and who relate to who she is as a person (her constituencies). The members of this group will give because they know that the candidate will represent their points of view when elected.

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Later in the campaign, after the opponent is defined, another group of potential donors will emerge—those who do not want your opponent to win. This could be an addition to your ideological folks or it could be unrelated to your point of view.

Finally, the last group to focus on in your donor organizing strategy is made up of political investors – those that base their contributions on your candidate's viability. They want to invest in the winner. Until there are poll numbers or significant endorsements, it is difficult to get donations. However, these relationships need to be cultivated early in your campaign so that when they're ready to make a decision, they know your candidate and campaign well.

Your Finance Director will need to develop a proactive strategy for organizing and cultivating these donor prospects before you need the cash coming in.

Work with your Finance Director to put these activities onto a timeline in your campaign strategy chart, and put clear metrics on those activities so that they are prioritized.

Create a strategy for generating an ongoing list of potential donors

You need to create your own unique prospect list based on the background, experiences and message of your candidate. Revisit Chapter 2 for ideas on building your donor prospect list.

Remember, it is ILLEGAL to use the FEC and many state contributor lists for your own fundraising purposes.

Within your district, you can expand your prospect list by getting copies of annual reports from local cultural institutions and non-profit organizations or reach out to leaders of civic or issue organizations that are sympathetic to your candidate.

Create a re-solicitation strategy

Develop your strategy for re-solicitation. How often will you ask for money, and at what key dates or opportunities? Lay these out on your campaign strategy chart.

All donors, regardless of contribution level, should be asked to make another contribution to the campaign every few weeks. Ideally, donors will be solicited in the way they made their initial contributions, however, using the Internet or mail can also be effective. The response rate is generally 5-20%.

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YOUR RESPONSIBILITIES AS A MANAGER

If you have a paid Finance Director, that person is ultimately responsible for the finance plan and strategizing described above. However, you have particular responsibilities as a manager to ensure that your campaign meets finance goals.

Budget your candidate's time

Focus on the candidate's role in fundraising during each phase of the campaign. Early on, the candidate needs to spend 80% of her time on fundraising, calling prospects for contributions and recruiting others to become volunteer raisers to generate money for the campaign. As you shift to the Engaging Voters phase of the campaign, the candidate might spend about 50% of her time on fundraising. At the end of the campaign, the candidate might only spend 20% of her time on fundraising, but it will never end completely.

And that's just for call time. These numbers are separate from the amount of time the candidate needs to spend at events, and meeting with PACs if you are taking PAC money.

It's your job to manage your candidate, which includes motivating her and holding her accountable to the work it will take to raise money and sustain the campaign.

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Manage your Finance Director

Schedule regular one-to-one meetings with your Finance Director to review progress to goals, adapt the finance strategy, and monitor the cash flow. Continue to ask yourself these questions:

- Is the finance operation meeting goals and benchmarks?
- Am I giving the finance operation the resources (scheduling time and staff) they need to reach their goals?
- Is the finance operation using all of the tools available to the campaign to raise money?
- Where is the finance operation in the prospecting process?
- Looking at the campaign overall, are there other opportunities in field, earned media, paid, media, etc., that can be used for fundraising?
- How am I checking in with the Finance Director every day?
  Daily check-in conversation?
  Daily email from Finance Director to manager, candidate, consultants and key advisors?

Integrate finance into the rest of the campaign

Often the finance operation of the campaign is mentally (and sometimes physically) apart from the rest of the campaign. It is your job as the Campaign Manager to make sure that the candidate and all staff and key volunteers understand the critical role that fundraising plays in the campaign. Call time must be considered sacred. Also stress that fundraising is not the sole responsibility of the candidate and Finance Director, every member of the team can help raise money through grassroots activities.

Volunteer lists, email lists, and political lists must be shared with the finance staff to be used as donor prospects. In turn, the finance staff must be willing to turn over the contributor list to the field staff to help them find volunteers and surrogates.

Finance staff and volunteer raisers need to be kept abreast of message changes and must also be willing to tell the communications team what they're hearing as they ask members of their social networks to make financial contributions to the campaign. This will help the communications team to drive a consistent message to voters.

All paid media should drive voters to a landing page where email addresses and/or mobile phone numbers are collected. The email addresses should be regularly added to the online solicitation list.

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Key questions to discuss with the Finance Director when you're looking at the finance plan:

- ✓ What is the overall fundraising goal of the campaign?
- ✓ When will the money be in the door?
- ✓ When will the candidate and his or her spouse contribute and how much?
- ✓ Is there a previous donor list? If yes, how many previous donors are there and what is the format of the list?
- ✓ What finance database will we use to track potential donors, pledges, and contributions and to create the finance reports? Do we already own it? If not, how much does it cost?
- ✓ In general, which individuals and groups are we targeting to contribute to the campaign?
- ✓ Which tools (candidate call time, events, direct mail, online, finance committee) will be used to raise the money?
- ✓ What will the candidate's role be in fundraising during each phase of the campaign?
- ✓ How many staff people do we need to reach our goal? ***BE REALISTIC.*** For each new donor, it takes 15-20 minutes of research. For four hours of call time, that could mean 120 donors or 30 hours of research.
- ✓ How many volunteer raisers will we need on the finance committee to reach our goal?

Remember, your finance strategy is a living, breathing plan—one developed on a daily and weekly basis by your Finance Director in collaboration with you. Without money and reliable cash flow the campaign will whither on the vine.

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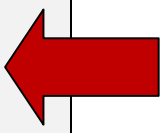
DEVELOPING YOUR MESSAGE STRATEGY

ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy				
Message Strategy • **Field** • **Earned Media** • **Paid Media** • **New Media**				
Mobilization Strategy				
Management Strategy				



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In previous chapters you figured out who your target voters are and what your message is. Now it's time to design your communications strategy to engage those voters and to drive that narrative.

In this section, we focus on creating an integrated communications plan. You will also learn about principles and tools for:

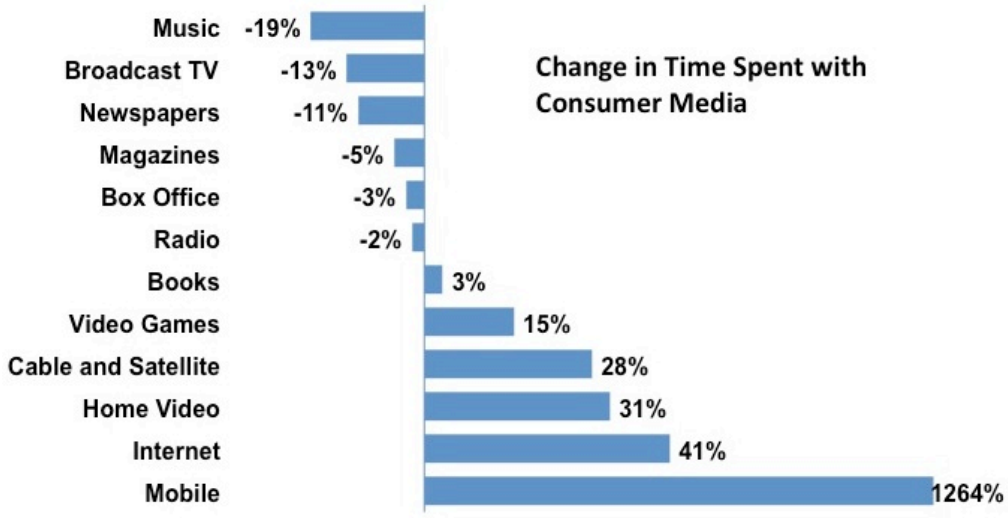
- Paid media (advertising)
- Earned media (news coverage)
- New media (Internet and mobile)

Find the best media mix for your voters

To create a communications plan, the questions you need to answer are:

- How do our target audiences get their information?
- What are we going to do to engage these audiences and drive our message?

The way voters consume information is changing rapidly. As shown in the chart below, media habits are shifting away from media that have long dominated political communications – broadcast television and newspapers – and toward cable TV, the Internet and mobile devices.



(Source: Booz Allen, 2009)

This is not to say broadcast TV and newspapers are no longer relevant – far from it. They are critical for reaching voters and opinion leaders. But the lesson of the changing media landscape is this: You can't bet your success on one or two of these media channels. You need to consider all of them – and employ a mix that works for your electorate.

You can gain insight on the optimal media mix for your campaign by asking your voters about their media habits in your poll. (At the end of this chapter, we've included some questions that you can include in your benchmark poll to help determine how your audiences are receiving their information).

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Create an integrated communications strategy

Given the increasing complexity of the media landscape, it's more important than ever that your communications are integrated. That means using multiple "channels" of communication to connect with voters in a variety of ways. The various channels complement and reinforce each other, increasing the reach and frequency of your message.

For example, TV advertising can quickly raise awareness of the campaign among a large group of voters, who are then more likely to retain your message when they get a knock on their door from a field organizer or volunteer, or hear about your candidate on the local news.

The chart on the following page is an example of an integrated communications strategy. The first step is to consider the sequence of the themes that you want to communicate to voters over the course of the campaign. The chart suggests a classic narrative arc for an election campaign in the column labeled Message:

1. Listening

Many campaigns begin with a listening phase, when the candidate is spending time talking with voters to hear about their hopes and concerns. This is a good activity for the foundation-building phase of the campaign, when you are beginning to engage the candidate's family and friends, and developing the message for the persuasion phase.

2. Bio

Ideally, you will want to introduce your candidate with a positive message that inspires people. The bio message is particularly helpful for engaging early supporters, who are most likely to be partisan voters (as opposed to undecided or swing voters). Many campaigns use this phase to highlight the candidate's accomplishments and personal story.

3. Contrast

When the campaign kicks into high gear to engage voters, the message will most likely focus on drawing a contrast with the opponent. Although you'll still be introducing your candidate during this stage, the contrast message is likely to be critical for winning over undecided voters.

4. Call to Action

During the GOTV phase, your message should be a call to action that reminds voters what's at stake in the election and why it's important to vote.

While this narrative arc is shown across the four major phases of the campaign, the same sequence is often used in a more compressed time frame in paid media during the persuasion phase (Engaging Voters).

The sample strategy on the next page shows when and how various communications channels can be employed in tandem to deliver the same core message in each phase.

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Sample Integrated Communications Strategy

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Message	**Listening**	**Bio**	**Contrast**	**Call to Action**
Goals	**Connect with voters**	**Introduce candidate**	**Persuade undecideds**	**Turn out supporters**
TV Ads	None	None	Run bio and contrast ads on cable and broadcast	Positive GOTV ads on cable and broadcast
Radio Ads	None	None	Run bio and contrast ads tailored by audience (eg country music, Spanish-language)	Positive GOTV and negative opposition ads tailored by audience
Direct Mail	None	None	Three mailings on bio, issues and contrast tailored by audience	Positive GOTV and negative opposition pieces tailored by audience
Other Paid Media	None	None	Outdoor ads to reach suburban commuters, transit ads to reach urban commuters	Continue outdoor and transit ads
Online Ads	Advertise on political blogs to reach opinion leaders early	Buy search engine advertising to promote website	Run ads on social networks, news media websites, blogs that reach key groups (like women)	Continue ads with GOTV message
New Media	Launch campaign website w/blog and encourage comments	Launch Facebook and Twitter feeds, post bio video on website and YouTube, create Wikipedia bio	Launch viral campaigns delivering opposition research hits, online town halls, text reminders for early vote	Email YouTube GOTV video; launch viral GOTV reminder campaign; send text messages reminding people to vote
Earned Media	Conduct newspaper, TV, radio and blogger interviews around announcement and tour	Campaign rally at a site that's important in the candidate's bio	Roll out major endorsements, place opposition research, meet editorial boards, stage issue-oriented media events that drive contrast	Hold GOTV rallies, conduct live radio and television interviews
Field	Stage intimate campaign announcement at candidate's home, hold district "Listening Tour"	Conduct "Meet the Candidate" tour at house parties organized by supporters	Run phone banks and door-to-door canvassing to engage voters in contrast conversation	Run GOTV phone banks, door-to-door canvassing and phone banking, visibility

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Example: Building an integrated strategy to reach seniors

An integrated communications strategy can be used to target specific constituencies at strategic points in the campaign.

For example, suppose you want to reach seniors with a contrast message on the topic of Social Security a month out from Election Day. You know from your poll that seniors tend to be home during the day, read newspapers, watch broadcast TV news, and talk on the telephone via landlines (read your poll and don't necessarily take these things for granted!).

You can use a mix of available channels to engage voters and drive the message for maximum impact according to the chart below:

Audience	**Seniors**
Goals	Raise level of support among seniors
Direct Mail	Send a hard-hitting direct mail piece to seniors on the voter list.
Online Ads	Buy a display ad on the website of the leading newspaper and TV station.
New Media	**Viral:** Send the contrast message to seniors on your email list – and ask them to send it to friends. **Website:** Create a landing page especially for seniors and buy Google AdWords to drive seniors to the site.
Earned Media	Hold a press event to generate news coverage in local newspapers and on broadcast TV.
Field	**Volunteer Doors:** Deliver a lit piece on the topic to retirement communities. **Volunteer Calls:** Phone bank seniors on the voter list with the contrast message (preferably engaging senior volunteers). **Visibility:** Hold visibilities outside drugstores, senior centers, and other places where seniors can be found, with volunteers handing out the lit piece.

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Put your plan on paper

When creating your integrated communications plan, start with the following questions:

- What vehicles can I afford?
- What can I get for free?
- What will I buy and what will I do to drive the message?

You will want to budget for your most expensive, paid media options first, then figure out how to supplement them with investments in earned media and volunteer-driven communications. That's because paid advertising is the biggest item in your communications budget – and because it has the greatest potential to reach the most undecided voters. Even if paid media is not the first communications activity to be executed in the plan, it will definitely be the biggest line item in the budget.

Your choice of media will depend on the types of vehicles available in your area. The media mix for a densely populated urban zone in an expensive media market will be very different from a suburban or rural area with few media outlets.

You can then lay out your integrated communications strategy into two distinct plans:

- A **10-month plan** that runs from the beginning of the year up to the GOTV phase. This helps you consider all of your options and plan ahead in order to drive the message proactively over the course of the campaign.

- A **10-week plan** for the home stretch of the campaign, when you will be spending most of your resources on communicating with persuadable voters. This helps you focus, in detail, on how you will invest your resources when the critical mass of voters are paying attention. At the end of this chapter is a template that you can use for your own 10-week plan.

On the following pages are examples of integrated communications plans for urban and suburban/rural areas.

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SENARIO 1: Expensive, urban media market

	Medium		Volume	Description	Strategy
Paid	TV	Broadcast	Light	1000-points of broadcast in last week (1 spot)	High cost means you can only be on air for a short period
		Cable	Heavy	X spots last 3 weeks	Cable is much cheaper than broadcast, so it can start earlier
	Radio		None		Radio is cheaper than broadcast or cable, but since resources are limited, the decision is made to avoid radio
	Direct Mail		Heavy	12 piece program to persuasion targets to amplify cable message; 5 extra pieces to households not reached by cable	A robust direct mail program is used to support the cable message and reach important households that cable does not reach
	Online Advertising		Medium	Maximum buys on local media, social networks, and blogs	Online advertising is low cost and highly measurable, reaches opinion leaders, news consumers and people looking for information about politics. Also drives people to the campaign website
(almost) Free	Field	Phones	Medium	Volunteer phone banks targeting buildings and homes that are inaccessible by canvass	With residential areas in very dense urban areas, most volunteer resources should be directed to the canvassing program. Because of the density, volunteers can efficiently do quality face-to-face contact
		Canvass	Heavy	Density allows for easy canvassing	Daily canvasses focus on identifying supporters and turning out supporters to vote
	Earned Media	Major Outlet	Light	Newspaper endorsements and two to three stories in major newspapers	Major metropolitan newspapers and TV stations won't provide a lot of coverage, especially to down ballot races
		Minor Outlet	Heavy	Weekly stories and photos in specialty media and weekly newspapers	Smaller papers and even local cable outlets will have more interest in covering local races
	New media		Heavy	Emails to supporters	They're almost free but we don't want to burn through our list. So once a week at first, then more regularly in the last 4 weeks with volunteer and donor asks.

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SENARIO 2: Cheaper, rural market

	Medium		Volume	Description	Strategy
Paid	TV	Broadcast	Light	6000 points of broadcast beginning Week 10	Lower cost means you can run more points for a longer amount of time
		Cable	Heavy	X-spots Weeks 10-1	In a low cost market, cable advertisng can be started earlier and can be targeted more precisely
	Radio		Heavy	X-points Weeks 10-1	Rural radio is often very inexpensive and can be used to target a particular audience or amplify your TV advertising
	Direct Mail		Medium	6 pieces to rural voters; 6 pieces to Catholics; 3 pieces to idependent women on choice	Mail is a highly-targeted way to reach specific demographic universes identified in your poll. With so much happening on broadcast, your mail program can focus on particular messages and particular universes
	Online Advertising		Heavy	Maximum buys on local media, social networks, blogs	Rural areas have fewer online properties but you can max out on the sites available
(almost) Free	Field	Phones	Heavy	Volunteer phone banks to entire target universe	Phones are the primary mode of person-to-person contact in rural areas
		Canvass	Light	Weekly canvasses in areas with residential density	If density is low, canvassing is very inefficient. However, if you have built a strong volunteer organization and your volunteer leaders are committed to the goal of contacting rural voters, it can be a part of your program
	Earned Media	Major Outlet	Medium-Heavy	Weekly stories in small daily newspapers and frequent radio interviews	Papers and stations in smaller markets may be more likely to cover your campaign. You should always try to get as much (good) earned media as you can, but with staffs shrinking you may only be able to get moderate coverage
		Minor Outlet	Heavy	Photos in weekly newspapers and frequent interviews with radio stations	Smaller papers and even local cable outlets will have more interest in covering local races
	New media		Heavy		Organizing online can make it easier to find, engage, and manage volunteers in situations where a campaign office may be a long way away

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PAID MEDIA

Media team

Your paid media team will likely include the Campaign Manager, Communications Director, media consultant and/or direct mail consultant. The media consultant's job is to produce high-impact ads, develop a budget that gets the most mileage for your ad dollar, and purchase time and space on the media properties you choose to utilize. Your Communications Director should work with the consultants to ensure that all of the vehicles you choose to employ –paid, earned and volunteer – work together to drive key themes consistently.

Media buy

Your media consultant, working with a media buyer, will recommend how many "points" of broadcast TV, cable TV, radio and other channels you should buy – in which markets, and over what time period – in order to reach the voters targeted by your pollster. Your consultants should have comprehensive information on voter attitudes, demographics, consumer data and media habits from a variety of sources to help target your paid media. The advertising must achieve sufficient "reach" to influence enough of your target voters and sufficient "repetition" on the air for people to remember the message.

Content

Remember, effective advertising is not all about the number of points you buy. Quality content is critical. To be effective, an ad must first be noticed – it has to stand out among the thousands of other ads that bombard consumers on a daily basis. It must be memorable – people must retain key concepts and words. It must be impactful – if it doesn't create an emotional reaction, at least a positive feeling about your candidate, people aren't going to notice or remember it.

Testing

TV ads, direct mail and other forms of advertising can be tested in focus groups before they are placed. This helps you refine the messages and determine if the visual content and presentation resonates with voters. If you make a major investment in advertising, you can also run "tracking" polls to see whether your ads are actually persuading voters to make up their minds in your favor during the home stretch of the campaign.

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KEY TERMS

Below are a few key terms about advertising that will be helpful in discussing your paid media plan with your consultants.

Cost Per Rating Point (or Cost Per Point): The cost to reach one percent of a given audience (e.g., young adults or seniors). Knowing this number helps you compare the cost of TV advertising in different markets, which can vary significantly.

GRP (Gross Rating Points): Provides a rough estimate of how many times your audience will see or hear an ad on television or radio. Ideally, 100 points reaches your entire audience once, 500 points reaches it five times, 1000 points reaches it 10 times, and so on. These are rough estimates, since some audience members will be exposed to the ad more often, and others less often.

Cost per spot. How much you pay per ad on cable TV each time it runs.

Designated Market Area (DMA). The Nielsen Company's term for geographical areas covered by broadcast TV stations. This is what consultants will be using when they talk about your market. This will often be referred to as a "media market."

Drive time. The time of day when commuters are listening to the radio in their cars (for example, Monday-Friday 6-10 a.m. and 3-7 p.m.). Drive-time ads on radio can reach a lot of voters – and cost a lot of money.

Reach. The total number of different people or households exposed to an ad during a given period of time. This isn't a measurement of how many people actually see the ad, but the number of people who could potentially see the ad during a given time.

Frequency. The number of times an ad is printed or a commercial is broadcast within a particular period of time.

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EARNED MEDIA

"Earned media" refers to coverage and commentary in the news media gained through outreach to newspapers, television and radio news programs, local or political blogs and online news outlets.

For most local races, generating media coverage is likely to be difficult. Only hotly contested statewide races tend to get much attention. Newspapers are laying off reporters, and TV stations are often not so interested in issues and elections. Many media outlets aren't interested in politics unless there's a scandal to report.

However, a creative earned media strategy that tells a locally-compelling story can help you generate coverage. Newspapers will usually run editorial endorsements in major races. Large, daily newspapers will have political reporters or columnists. Many regions have weekly newspapers and small radio stations that are hungry for news and guests. Bloggers who write about politics can be an important channel to political junkies, opinion leaders and donors. You can also deploy volunteers as guests on radio call-in shows, and to write letters to the editor and blog posts, putting a human face on the campaign.

On the following pages are key concepts a manager needs to know about the news media, and tools and techniques you can use to generate media coverage for your campaign.

Anyone Can Be a Reporter

In today's media environment, *anyone* can be a reporter and *everything* is potentially on the record. The candidate, staff and volunteers may not realize how quickly their words or actions can define or distract the campaign. Any statement or interaction can easily be recorded, YouTubed and swiftly spread online. So train everyone - staff and volunteers included - how to talk about the campaign. Make sure everyone knows to respectfully refer journalists (or protestors or critics) to the appropriate campaign staff if they are approached for comments or information.

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Identify the media in your market

Local Weeklies

Don't overlook weekly newspapers, which are often hungry for news and will even run press releases. You can also use the headlines in your TV ads.

Political Reporters

Develop a list of the newspaper, TV and radio outlets that will cover your race (see if they have covered previous races in your area). Put them on your press list to receive all information about the campaign. Establish close relationships with these reporters early on.

Editorial Writers & Columnists

Determine which editorial writers and columnists write about politics, and which might be supportive or open to your candidate. Cultivate relationships with them, just as you would with reporters. These are people who probably do not want every press release from the campaign, but may respond to selective outreach and offers of access to the candidate. Most editorial boards will schedule interviews with candidates prior to issuing endorsements.

Specialty Media

Identify outlets that reach specific constituencies (for example, African-American, Hispanic, gay/lesbian) or focus on relevant topics (for example, health care, immigration, environment, business). These outlets will not regularly report on your race, but may discuss it though the lens of an issue, news item or constituency perspective.

Lifestyle & Features

Consider outlets and programs that cover culture and lifestyle, such as society magazines and alternative weekly newspapers. Morning television programs may focus on lifestyle programming, not politics, but you might interest them with potential guests who can also plug the campaign.

Blogs & Alternative Media

Determine which local and national political blogs might be interested in your campaign. Nationally known bloggers can direct significant sums of online donations to hotly contested campaigns. Many bloggers do not want to be bombarded by press releases. They may prefer less frequent, more targeted outreach, including: timely links to articles they can quote; videos that can be embedded on their site; access to staff and the candidate; and, for national bloggers, intelligence about how the race intersects with national trends.

Talk Radio

Public radio, news/talk stations, and other radio stations discuss political topics, so be aware of talk radio and its reach in your area.

See sample press list at the end of this chapter.

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Be proactive

Form working relationships

Your Communications Director needs to form productive working relationships with key reporters covering your race. It's often helpful for the Campaign Manager to have coffee with key reporters to open a line of communication, in case you need to step in and help manage a relationship or deal with a crisis.

Shape campaign coverage

Reach out to reporters, don't wait for them to call. Your spokesperson should be talking to reporters regularly, suggesting stories to shape the coverage.

Get into the "news cycle"

Stay on top of news and find opportunities to insert your candidate into the news cycle. This can be as simple as issuing brief statements in response to stories in the news about politics and policy.

Engage volunteers

Recruit volunteers who are good writers to draft letters to the editor or op-eds that can be placed in newspapers. Create a list of volunteers who listen to talk radio and will call into radio shows to talk about the campaign.

Make news

Below are a few tools you can use to make news:

Photo opportunities

Pictures go a long way in connecting with voters. Begin planning any media event by imagining the picture you want. Your visual should usually involve the candidate interacting with voters, not standing behind a lectern. Try to create genuine situations for the candidate to listen to engage with real people – and make it easy for photographers to get good pictures.

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Events

Stage events with the candidate to highlight issues important to voters, roll out major endorsements, or rally supporters to show momentum. You need to be creative to get coverage. Create events with energy and movement to attract television. For example, instead of holding a roundtable discussion on Social Security, have your candidate shop in a local grocery store with a senior to show how hard it is to make ends meet.

News Releases

Distribute news releases about major endorsements, rollouts of important policy plans, and other campaign news. The best releases are written in the tone and style of journalism, not over-the-top political rhetoric. The most successful releases read like news stories – and may even be printed in small newspapers or read over the radio. Some small newspapers will run your pictures, too.

Statements

Statements are simply quotes that you can write and give to reporters, rather than putting the candidate or spokesperson on the phone. They are used to comment on breaking issues or as responses to negative attacks and problematic questions (when you don't want to be exposed to questions from reporters).

Editorial Board Meetings

Meeting with the editorial boards will increase your chances of earning endorsements by newspapers. Editorial board endorsements usually happen late in the campaign cycle, but you should cultivate relationships with influential editors during the campaign and send them information on substantive topics.

Plan your coverage

Whether writing a news release, staging an event or pitching a story, you should know in advance what you want the story to say – and show - about the candidate. Your team should write the ideal headline, lead (first paragraph) and quote (or sound bite) for the candidate. Anticipate the questions reporters will ask, and prepare on-message responses. Determine what moment of the event you want to be photographed, then stage the environment and choreograph the movement to get your desired image.

TOOL: At the end of this chapter is a Story Planning Grid to help you plan an ideal news story

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SURVIVAL RULES FOR WORKING WITH THE MEDIA

Dealing with reporters can be tricky business. Here are some guidelines for working with the media.

Designate one spokesperson

Determine who speaks for the campaign to the news media. All calls should be directed to that person. Nobody else should talk to reporters, even in casual situations. You do not need to be that person if you have someone else trained and ready.

Establish ground rules

When talking with reporters, establish ground rules for the conversation before you begin. Unless you specify that a conversation is "off the record," anything you say can be quoted. You can talk "on background," which means your quotes will be used but you won't be named – the reporter will identify you as a "campaign supporter" or some other euphemism. To play it safe, assume everything is on the record.

Don't lie

If you don't know the answer tell them you'll get back to them. Don't speak on behalf of your candidate if you're not sure what she would say.

Prepare for interviews

Before talking to a reporter, determine what you want to say. No matter the topic, you should know exactly what you want to see in the news. Anticipate questions and craft answers that are "on message."

Don't alienate reporters

Too many political operatives take negative press coverage personally. If you don't like a story, it's okay to complain to the reporter or editor – but keep a measured tone and focus on the facts. It's counterproductive to lose your cool and burn bridges - the most productive response to a negative story is to make the next story better. It goes without saying that to preserve your credibility, you must never mislead or lie to a reporter.

Hang up and call back

Even some of the best managers do not take direct calls from the media. They take down contact information, check in with relevant members of their communications or research team, take a deep breath, and then call the reporter back.

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NEW MEDIA

Just like paid and earned media, new media are a critical part of your communications strategy. The components of new media include email, video, blogs, design, and social networking. Just like the other pieces of the campaign, it's not enough to just send emails, make videos, and put up a Facebook page. Your new media program has to act strategically for the campaign, taking advantage of opportunities to build more resources and get you closer to winning. It must also be constantly evaluated for effectiveness, and be provided proper resources to function well.

Two key ways to think about the use of the Internet for your work:

1. supporting all the other work in the campaign (field, finance, communications), helping them to go to scale
2. creating new avenues for organizing by capitalizing on key moments

The same principles of organizing that work for other parts of your campaign are integral to how you use new media. You have to have a compelling story (theory of change) about how someone's involvement will actually impact the outcome of the race. Your New Media program is about building relationships with your supporters—engaging them in two-way communication—and helping them build relationships with each other. And your online program should drive participants to action.

All of your online output from New Media will have to balance the demands of the three pillars of the campaign – message, money, and mobilization, which can be a challenge. Your ultimate goal with New Media is to conduct the program in a way that tells a story of how all three of these functions are interrelated, which will be the most effective way to get good results with fundraising, mobilization and communications.

Management – The primary owner of your new media program will have a great challenge. How can they help get more volunteers for field, raise money, and effectively drive your message, while at the same time trying to recognize unique moments to take advantage of existing energy in the media and online that has the potential to create an organizing moment? New Media staff have in the past been put under finance, field, or communications. managers While this may be a necessity at the beginning because of staff sizes, you'll likely risk losing momentum for its use in the other functional areas if your New Media department gets put in one silo. New Media is so important to today's campaigns that you should have a senior level staff or volunteer to manage these functions in the new media department:

Email List Building
Blogs
Social Media
Video
Design
Online advertising

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Your campaign should immediately establish a very *basic* presence on major social media -- and then assess over the course of the campaign which networks are productive for your goals. Some social media may provide a frequent source of volunteers and fundraising, like Facebook, while others will rarely be worth significant staff time. Initially creating at least a basic page on a range of sites, however, enables you to determine:

- which sites attract organic growth (without staff time)
- which are more popular in your region
- which sites and communities seem to fit the kind of campaign you are running

Build a Network to Capitalize on Organizing "Moments"

Some of your social media sites may be dormant for months, but then provide a platform to capitalize on a particular organizing or media moment in your campaign. Your Twitter feed might be rudimentary, but an event that puts your candidate (or opponent) in the national news could draw tremendous organic traffic to your twitter page, and enable other people to link directly to your page when discussing the event, which could draw new people or fundraising into your network.

Example: This dynamic benefitted Rob Miller, the candidate opposing Rep. Joe Wilson in 2009. Miller had a basic, very early presence on Twitter and Act Blue, but it was largely ignored -- until Rep. Wilson's outburst during President Obama's health care address. Then, even though the event occurred long before conventional campaigns begin, Miller had platforms ready for organizing. His pages on Twitter and ActBlue were deluged; he raised over $1 million in response and drew thousands of people into his networks organically.

Listen to Your Social Network and Tailor Your Messages

Developing a network on sites like Facebook and YouTube also provides a grassroots apparatus to amplify successes that you have already achieved within traditional media. For example, a newspaper endorsement can be amplified as an item people share with their friends on those sites, and a funny or gripping video can spread virally with an initial boost from your campaign's contacts on these networks. Furthermore, you should experiment to see which particular content and messages are especially popular in social media – it may diverge from the topline messages you are using for traditional press. This approach allows you to tailor and target different messages and appeals to particular communities and media spaces. Younger voters on Facebook, for example, may be more likely to share an item from an irreverent local blog, or a lighthearted video clip, than a more sober newspaper article. By listening and engaging your networks, you can provide different windows into the campaign and efficiently spread your candidate's story.

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The Story is The Story

Actual, measurable successes in online and social media are increasingly of interest to the traditional press and some of the electorate at large. While the goals of your New Media program should focus on their intrinsic organizing potential – connecting with voters and turning online interest into offline results for field and fundraising – you should also watch for success that can be presented to the traditional press as part of your campaign story. Media coverage of the people involved in your campaign advances your broader *narrative* goals -- and has the added benefit of increasing your recruitment by showing more people how they can be involved the campaign.

Mobile phones are rapidly becoming among the most common communications tools for many groups of voters. Your campaign should consider how to use mobile technology to connect with supporters and voters. Some potential uses of mobile phones include:

- Crowd-building by sending event notices to supporters
- Forwarding the message of the day to surrogates
- Creating viral campaigns with forward-to-friend texts
- Reminding voters to turn out on Election Day

You can build a mobile network list over the course of your campaign, just as you build your other lists. You can ask people for their cell numbers when canvassing by offering to send a GOTV reminder. You can set up a text address and encourage people to text their number to you at events. You can include the text address in direct mail, ads and websites.

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PREPARE FOR RAPID RESPONSE

While you plan to generate positive media coverage, you also need to develop a rapid response plan to address likely attacks from your opponent. Your plan should include the messages you'll use in response to attacks, actions you will take to drive your response message, and surrogates who will help deliver your message.

Here are steps to create a rapid response plan:

1. Review self research and determine vulnerabilities (you can test how damaging these are in a poll).

2. Develop a brief message on each critical item. Your message should have one line in response to the attack – not a long explanation. Immediately pivot to a counterattack (if possible) or back to your positive core campaign narrative.

3. Identify surrogates who can back you up when attacked. Good surrogates are people who are well respected or have credibility on an issue, people who will effectively deliver your response and/or counterattack.

4. Prepare a brief document if you have information that can refute the attack and/or shut down a negative story.

5. You may want to create a "Stop the Smears" website to help address a negative attack that gets traction. (Look for "stop the smears" on a search engine for examples.)

If you're attacked

First, you should convene your team to determine whether or not to respond to an attack. Sometimes you might just feed a story that would have gone nowhere if you respond. Think it through: Will the attack get traction in the news media – or in other channels that reach voters – if we don't respond?

If you do respond, here are some options to consider:

1. **Kill the story**

   Try to talk a reporter out of writing a negative story by proving it false.

2. **Counterattack**

   If you choose to respond, the best approach is usually a counterattack. Find a credible way to hit back on your opponent.

3. **Get it over with fast**

   If the media come at you with a scandalous story, don't drag out your response beyond the immediate news cycle, as this increases your exposure. Your initial response needs to be direct and complete enough to put an end to the story.

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4. **Respond in kind**

   If you are attacked in direct mail, respond in direct mail. If you're attacked online, respond online. Don't spread the attack to people who might not have heard it.

5. **Don't repeat the attack**

   When responding, don't repeat the substance of the attack, or you'll be doing your opponent's job for them.

6. **Get back to message quickly**

   Do what you can to generate a positive story to counter the negative.

Once your campaign really gets going it may be easy for your communications strategy to become very reactive to whatever the news is covering, or whatever you opponent says. Remember, though, that you're leading a proactive Engagement Campaign to build a base of supporters who will engage their friends, family and neighbors to turn out the vote. At every step of the way in your Communications strategy go back to the core strategy you articulated at the beginning of this chapter. How is each piece of your strategy intentionally helping you reach a core voter universe in your strategy, and how is it helping to drive your campaign narrative? Successful campaigns are those that can respond to attacks when necessary, but that are also able to drive a strong, aspirational narrative all the way up to Election Day.

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DEVELOPING YOUR MOBILIZATION STRATEGY

ENGAGEMENT CAMPAIGN STRATEGY CHART

	Phase I: Building the Foundation	Phase II: Engaging Supporters	Phase III: Engaging Voters	Phase IV: Winning
Time (Example)	**January-April**	**May-July**	**August-September**	**October-November**
Purpose	Develop campaign infrastructure, narrative & plan & raise early $	Turn supporters and donors into volunteer leaders and raisers and raise more $	Identify & motivate supporters, Persuade undecided voters and raise even more $	Turn out more supporters to vote than your opponent does and spend all your $ doing it
Key Dates				
Goals				
Money Strategy				
Message Strategy				
Mobilization Strategy • **Volunteers** • **Sporadic Base** • **Persuasion** • **New voters**				
Management Strategy				

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INTRODUCTION

While your Message Strategy is built to reach voters en masse, your Mobilization Strategy is built to reach and track voters at an individual level, with the goal of securing individual commitments to turn out to vote for your candidate.

The foundation of your field plan is the vote goal and targeting matrix you developed in Chapter 5. The purpose of your field program is to create quality contact with targeted voters, including person-to-person contact and direct mail to meet your vote goal. This will require budgeting the human and financial resources you have across time and geography to reach the largest possible number of your targeted voters as often as possible before Election Day.

A key part of your campaign's field plan is your strategy for developing volunteer capacity. An Engagement Campaign timeline—where the early weeks and months of the campaign are focused on identifying and training volunteer leadership—pays the greatest dividends when well-trained local volunteers can engage in the highest quality voter contact and voter turnout in the later phases of the campaign.

Remember, it is not your job as the Campaign Manager to write the whole field plan unless you are leading a small local race that may be entirely a field operation. In larger state or federal races your job is to hire a Field Director and to coach that person through writing a plan with you and others on your campaign and consulting teams. It is critical that your Field Director own the goals, benchmarks and program developed in the plan.

Your best Mobilization Strategy will be the one that best builds and deploys your resources to:

- ID the most supporters in your targeted universes, and
- Turn out the most supporters to vote

Your Mobilization Strategy should be specific to each phase. Create a volunteer recruitment plan, volunteer leadership structure and volunteer leadership development strategy for the Engaging Supporters phase. Create a targeted voter contact strategy for the Engaging Voters phase. And create a Get Out The Vote strategy for the final phase.

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ENGAGING SUPPORTERS PHASE

CREATE A VOLUNTEER RECRUITMENT STRATEGY

Engagement Campaigns put extra emphasis on developing volunteer capacity to carry out high-quality, high-volume voter contact and voter turnout work. That means you need to support your Field Director in creating a clear volunteer recruitment and training program to begin very early in your campaign.

SAMPLE GOALS & METRICS FOR ENGAGING SUPPORTERS PHASE		
INPUT METRICS	**OUTPUT METRICS**	**GOALS**
# recruitment calls # house meetings # one-to-ones # visits to schools & churches # volunteer leader trainings	# attendees at house/org meetings # volunteer prospects % of prospects contacted # of unique volunteers at phone bank/canvass # volunteers trained	5 volunteer leadership teams of 4 people each 50 additional active volunteers

The scale of your volunteer effort should be in proportion to the capacity you need at the end of your campaign to turn out your supporters to vote.

Go slow early to go fast later

While it may be tempting to just dig straight into voter contact in April, it isn't likely to make a significant difference if the election is 7 months away. The early phases of your campaign provide the time to focus on turning your core supporters into volunteers, and turning volunteers into volunteer leaders who will be the force behind your voter contact and voter turnout programs later in the campaign.

Your program for identifying and developing volunteers should have very clear metrics, just like the rest of your campaign.

Use these metrics to help your field staff understand which tactics work best for volunteer recruitment for your candidate and in their own turf.

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Volunteer recruitment tactics

Just like there are many tactics for fundraising and for communications, your campaign's field strategy to recruit volunteers should also be diverse, so that any supporter who engages with your campaign is being recruited to step up and volunteer.

Website and email

Be sure your website has a way for volunteers to sign up to work with your campaign. Email supporters to let them know about organizational meetings, house meetings, and other events where they can sign up to volunteer. (Double check with your New Media Director to be sure they are collecting zip codes as mandatory data so you can target asks by neighborhood.)

Text messaging

Set up a text message number where supporters can text their info to volunteer. Publicize this number at all events, on your website, and on all campaign literature.

Phone calls

If your organizers are calling through supporters and High Turnout Base only to do a direct volunteer ask they may find it very tough going. However, if they do recruitment calls every day to invite supporters to Organizational meetings and House Meetings, they can use those meetings to get supporters up to speed, to help them build relationships with each other, and to motivate supporters to volunteer for voter engagement work.

Organizational meetings

Field staff should host frequent organizational meetings to engage supporters, introduce them to the candidate and campaign, and to recruit volunteers. **See Sample Organizational Meeting Agenda at the end of the chapter.**

House meetings

For house meetings, field staff find a volunteer hosts and work diligently with those hosts to turn out their own network of friends, family and neighbors. The volunteer host plays a key role in the house meeting and can play a critical role in turning attendees into volunteer prospects. The process of recruiting and confirming house meeting attendees can be a good first test for volunteer team leaders.

Constituency outreach

Targeted outreach to schools, neighborhood groups and elected officials can generate supporter IDs and volunteer prospects.

Events

All campaign staff should be trained to run a tight sign-in system at all events, where all participants have to sign a card saying whether or not they support your candidate and whether or not they will volunteer.

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CREATE A CLEAR VOLUNTEER STRUCTURE

Recruiting a community of volunteers is just the first step. But if they all report to one or two people they won't stick around very long. Creating a clear, transparent volunteer structure generates the opportunity for many to step up into leadership roles and own part of the campaign, and it maximizes the productivity of your field staff.

Creating structure requires two things: clarity about how turf is broken up and clarity about how people work together with well defined roles.

To cut turf, your Field Director should use the precinct-level spreadsheet you developed earlier with vote goals and vote deficits to decide how to group precincts into turf with roughly similar goals.

Set Regional boundaries first, then Organizer turf, then Volunteer Team turf

Break your turf into a few regions with roughly equal work goals. Some regions will probably lean more toward persuasion work while others will lean more toward base mobilization. Some turfs will require more door-to-door work (in dense urban areas) while others will require more phone activity (in rural areas). Put a map of your turf on the office wall so that everyone knows how it's broken up.

Use common sense

Since the precinct is the basic building block of voting activity, do not break a precinct across two turfs. Also, keep the precincts in one neighborhood, city, or county together as much as possible. Be sure there's a clear center of activity in each turf for staff and volunteers to work from.

Ask local leadership for help

Before finalizing your turf, ask trusted local leaders for help. Is there a river or highway running right down the middle of one turf making it more difficult for people on one side to get to the other?

Assign goals to each turf

Once you've cut the turf, use your precinct-level vote goal and ID goal spreadsheet to assign a vote goal and supporter ID goal to each turf.

Be transparent about goals

Give each organizer his regional turf goal, and give each neighborhood leadership team their turf vote goals and ID goals. Measure their progress to these goals daily over time.

Create team structure

Once you have clear turf set, determine what the structure will be for volunteers. In general, volunteer leaders who work in teams with clear roles and responsibilities will be more effective than if they're working alone. Teams allow volunteers to strategize together, weather rough patches and create more capacity and accountability than a random group of people alone.

Describe each of the responsibilities necessary for each role in the team structure, as well as the skills that will need to be developed.

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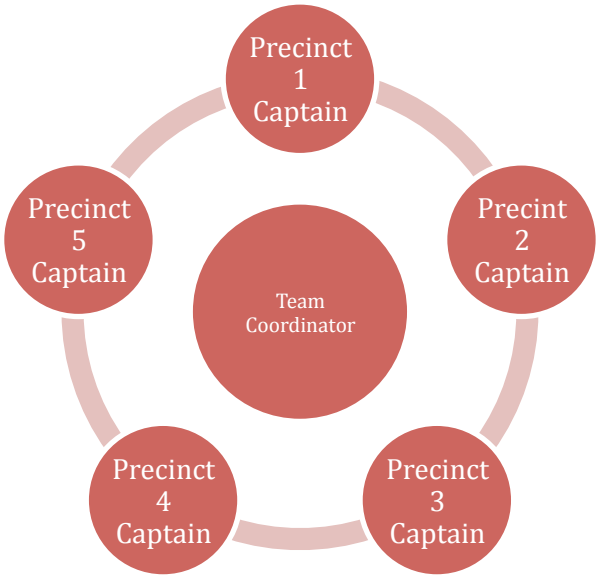
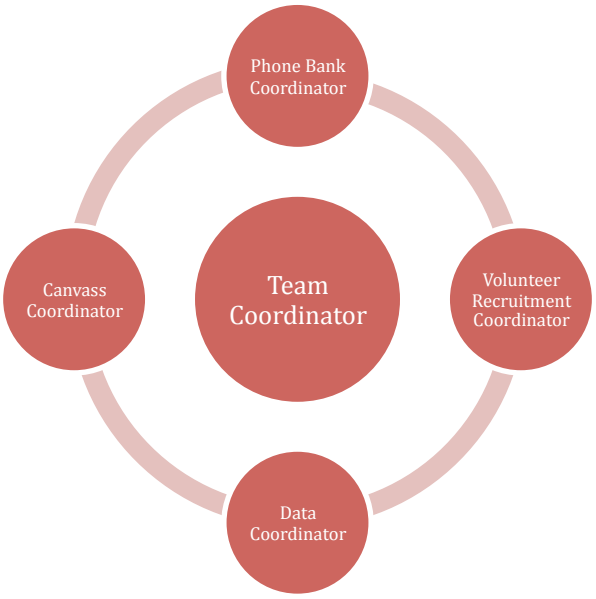
SAMPLE VOLUNTEER TEAM STRUCTURES

To effectively build the capacity of your campaign, every volunteer team needs to have a clear turf with goals of their own and clear roles and responsibilities. There are two ways to structure teams: the first by turf, the second by functional roles.



TEAM 1:
Each member represents one precinct and knows exactly what goal she is responsible for. The Team Coordinator's role is to help team members work together to maximize learning, solidarity and progress to goal for all precincts combined. This structure is critical for caucuses where every precinct needs at least one solid volunteer leader.

TEAM 2:
Role-based volunteer leadership acknowledges that volunteers have different skills and makes the most of those skills. All members are working together to reach a goal in a turf that may cover several precincts. This team can make progress in every precinct even if there's not volunteer leadership in every precinct. Also, these are the roles necessary for running GOTV staging locations, so volunteers trained and practiced in these roles can be good staging location leaders.



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CREATE A VOLUNTEER LEADERSHIP STRATEGY

Engagement Campaigns are those that invest early in the development of volunteer leadership so that the campaign has greater leadership and action capacity closer to Election Day when you need it most.

Train volunteers well with appropriate tactics

It's easy to say "we're too busy for volunteer trainings." However, taking time early in your campaign to train volunteers in basic organizing and leadership principles will pay dividends down the line. Training tactics include:

One to ones

One to one meetings between field staff and good volunteers can be a way to recruit those volunteers to leadership. Regular 30 minute one-to-ones with key volunteer leaders can also develop their skills, especially team management skills and data skills.

Team trainings

Gather one team for a skills training on how to run a good phone bank, how to run a good canvass, how to lead a great voter registration drive, etc.

Campaign-wide volunteer conventions

Invite all your strongest volunteers to one central place for a day-long (or weekend long) volunteer convention at the beginning of each phase to hear volunteer stories, debrief learning so far, celebrate progress, and train or retrain these leaders for the next phase of your campaign.

Select volunteer leaders carefully

Be sure your field team is clear about what it takes to become a volunteer leader on your campaign. Just because someone has been a great volunteer for another candidate doesn't mean they will be for your candidate. Also, the people who are first to volunteer for leadership are not always the best leaders.

Leadership titles and responsibilities should be given to those who *actually do* the most, not to those who *say they will do* the most.

To sort the doers from the talkers, just set up clear expectations for what it takes to become a leader on your campaign. For example, to become a Team Coordinator might require holding a house meeting with at least 15 people, coordinating a canvass that hits 150 doors in one day, and coordinating a phone bank that makes 300 calls in one day. Set up clear transparent tests for each key volunteer leadership role.

Remember, these are the people you'll be trusting with your campaign during GOTV, so be sure your field team is selecting them carefully.

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Train staff to create a culture of motivation, teamwork and accountability

Train your field staff and volunteer leaders in basic organizing practices, like telling their stories, building relationships, setting up leadership teams, helping teams strategize by evaluating their metrics and progress to goals, and holding teams accountable to goals.

Creating a team out of a group of individuals takes work. Just because you have lots of volunteers in one area doesn't mean they're working as a team to meet a clear, ambitious goal together. Creating a team means making sure they're meeting together, contacting voters together, evaluating their work together, and celebrating their progress to goals together. Investing time early in good team practices will make these teams much more self-sufficient when the big wave comes before Election Day. **See Sample Team Action Agenda at the end of the chapter.**

Your staff needs to be trained in how to coach teams. Like any working group of people, volunteer teams will hit rough spots. There will be personality conflicts and differences of opinion as well as tactical failures along the way. A good coach helps their team think through conflicts and mistakes and find constructive ways to move forward. This exercise in team problem solving makes teams more effective after the conflict is resolved. Remember that "coaching" is not "taking over." Allowing individuals and groups to learn for themselves will keep them from making the same mistakes later on. Coaching involves a significant investment of time and energy, particularly in the beginning, but pays off dividends as teams become more self-sufficient.

You and your Field Director should train and measure field staff in these basic volunteer team management skills:

- **Setting regular one-on-one check-ins with team leaders** to check in on progress to goals and to help the leader to improve voter contact. Team leaders may also need additional help recruiting volunteers, managing their team members and strategizing on how to get the most from all their volunteers
- **Setting regular team meetings** for relationship building, coaching, evaluation, planning and voter contact *TOGETHER*. Teams that meet on a consistent basis to evaluate and work together produce the best results. It also helps if the Organizer checks in with individual team members in addition to talking as a team. This allows an opportunity to talk through individual concerns and avoids conflict later on.
- **Helping teams to coach each other.** Helping team leaders to meet to discuss best practices and challenges is an effective coaching tool that results in a better performance from all of an organizer's teams.

Organizers must learn how to let their volunteers fail early while taking care to minimize the negative consequences. Volunteers will get better over time if their Organizers help them evaluate and learn from failure.

To be sure that Organizers are doing the work to build strong teams, your Field Director needs to track key team metrics (like each team's % to goal, # of volunteers per team, # of regular team actions, # of one to ones the organizer has with the team leaders) and make that data available to staff and volunteers.

If your Organizers master these skills, your voter contact capacity will reach far further than paid Organizers could achieve alone. Developing a strong field program for the Engaging Supporters phase of your campaign is, above all else, what sets apart an Engagement Campaign from other campaign models.

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ENGAGING VOTERS PHASE

TARGET YOUR FIELD STRATEGY TO THE RIGHT VOTERS IN THE RIGHT PLACES

The whole point of building strong volunteer capacity in the first phases of your campaign is to maximize voter contact in the later phases of your work. A strong voter contact plan requires that you decide whom you want to contact, how often you want to contact them, and by which means (door to door, phone, or mail). Targeting is the process of continually deciding where to make best use of your human and financial resources. For example, making the call whether an extra pass through your persuasion universe is likely to turn out more votes than expanding your sporadic base universe.

In Chapter 5, you generated a turnout projection and vote goal. You also did some research to find out where your voters are:

A. Your High Turnout Base voters who can be asked to volunteer
B. Your Sporadic Base voters who will need to be ID'd and motivated to turn out to vote, and who can be asked to volunteer
C. Your High Turnout Persuasion universe who will need to be ID'd and persuaded to vote for your candidate
D. Your Sporadic Turnout Persuasion universe who will need to be ID'd, persuaded to vote for your candidate and motivated to turn out to vote
E. Your New Base voters who need to be registered to vote and motivated to turn out.

You also figured out where your targets are most concentrated geographically by precinct.

As the campaign evolves, your Field Director will have to continually re-evaluate your targeting to be sure your field program is targeting the right voters in the right way to maximize increasing the number of people who will turn out to vote for your candidate over those who would turn out to vote for your candidate without any extra contact. Work with your Field Director to be sure that staff and volunteer efforts are targeted to maximize contact to your Sporadic Base and Persuasion universes.

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TARGETING 101
Chris Mann

What is Targeting?
Targeting is the process of focusing resources. This means making decisions about which races are worth contesting, or making decisions about where to focus resources within a given race. These two types of targeting are both ways of allocating limited resources so as to get the biggest "bang for the buck."

When targeting voters within a single race, a campaign should focus its resources where there is the most chance of changing a voter's behavior-and hence the outcome of the race.

Why target?
The primary reason to target is that every campaign's resources are limited. You never have the time or money to do everything you would like to in a campaign. Targeting helps you to focus your limited resources where they will do the most good.

Another reason to target is message appropriateness. Even if you did have unlimited resources, not all messages are appropriate for all audiences. Targeting helps you to get the right message to the right people.

Who do you target?
There is no one answer to this question because deciding who to target depends on what the campaign is trying to accomplish. Different phases of a campaign will focus on different subgroups of voters.

Targeting focuses resources where there is the most chance of changing a voter's behavior. There are basically two types of behavior that a campaign can influence: whether someone votes, and for whom they vote. A campaign will focus on different subgroups with different messages to affect each of these behaviors.

- A campaign's **persuasion** program seeks to affect **for whom a person votes**.
- A campaign's **GOTV** (Get Out The Vote) program seeks to affect **whether a person votes**.

The ideal target subgroups for persuasion and GOTV can be defined by process of elimination.

For Persuasion, the goal is to talk to the people most likely to be persuaded by your message.
- Don't waste your resources talking to people who support your opponent
- Don't waste your resources persuading people who definitely support you (except to motivate them to volunteer)
- Don't waste your resources persuading people who are undecided and never vote

For GOTV, the goal is to turn out your supporters without turning out your opponent's supporters.
- Don't waste your resources turning out people who don't support you
- Don't waste your resources turning out swing voters
- Don't waste your resources on people who will never vote
- Don't waste your resources turning out people who are going to vote anyway

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CREATE AN INTEGRATED FIELD STRATEGY FOR CONTACTING TARGETED VOTERS

There are a few key voter contact tactics that will vary in effectiveness according to the layout of your turf and how up to date the voter files are in your region. It is critical that you track key metrics on each tactic to determine which tactics work best for reaching your targeted voters and for moving them to support you and to vote.

Phone

Volunteer and paid calls to targeted voters can be used to ID voters (as supporters, undecided or for your opponent). High quality calls by well-trained callers can be used in combination with other tactics like canvassing and mail to persuade voters. You can also use phone calls to remind supporters to vote and to help them make a GOTV plan.

It is important to keep track of contact rates for calls (# of contacts with a live human/# of calls made) to decide how many times callers will have to pass through the whole universe to reach nearly everyone in the universe. Tracking contact rates will also help your staff find the best days and times to call different universes or different geographies.

Canvass

Door-to-door canvasses provide the highest quality voter contact, particularly when conducted by local volunteers working in their own neighborhoods. The number of contacts made per hour of staff or volunteer time is usually lower than on the phones, but the quality is much higher. Canvassing is most effective in dense urban and suburban areas and can be used for the same purposes as phone calls. Canvassers can also distribute persuasion or turnout literature as they canvass.

Mail

Mail is another form of targeted voter contact best used in combination with calls and canvassing. One advantage of mail is that it can reach rural and suburban voters who are difficult to reach face to face. Mail can be used to deliver a persuasion message to your persuasion targets, or to deliver a motivational message to help turn out your sporadic base.

Constituency Outreach

Constituency outreach is less targeted than phone, canvass or mail, but can be an effective way to engage voters who are concentrated in key demographic groups or key geographic areas. It can also be an effective way to register new voters in constituencies that highly support your candidate. Constituency outreach can be combined with your earned media work.

Constituency outreach may include outreach to elected officials, places of worship, schools, neighborhood organizations, advocacy organizations like environmental groups or women's organizations, barber shops and beauty salons in targeted neighborhoods, and so on.

Constituency outreach is most effective when combined with a well-organized supporter card drive (where supporters write down their current address and phone contact information) and a volunteer ask. It is critical that you track the number of positive IDs from your persuasion and sporadic base universes that are generated through constituency outreach just as you would with phone calls and canvassing to determine whether this tactic is worth your time and resources.

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Creating a strategy for targeted voter contact will be an ongoing process that you, your Field Director and consultants work on together.

1. **Start with the ideal scenario**. How many times would you contact each voter in each universe to meet your ID goals, to persuade a sufficient number of voters, and to turn out enough of your sporadic base?

2. **Decide how you can best use the resources you have to get those contacts.** Where will your mail budget go the furthest? Where will your volunteer efforts go the furthest? Where can paid voter contact best fill the gaps?

3. **Evaluate your tactics every day in every region**. Look carefully at where the contact rates are best and why. Be sure your field staff and volunteers are trained to look at progress to goals, as well as tactical results so they can continually strategize too.

4. **Revise your plan.** If you're meeting goals, then where can you best invest your resources to get even more votes or to shore up the support you have? If you're not meeting goals, where do you need to use other resources, like modeling, to make up the difference between your goal and what your field program can produce?

On the following pages you'll find sample templates for your voter contact strategy. Be sure that you and your Field Director are keeping the budget information up to date in your campaign budget as your assumptions change in your voter contact strategy. Remember, every voter contact costs money in phone minutes, literature or mail.

This plan can be made more specific if your field team labels precincts as urban (canvassable), suburban (partly canvassable), or rural (not canvassable). This will allow you to create an even more tailored voter contact program by increasing the number of passes through your universe by canvass in your urban areas and increasing the number of passes by phone in your rural areas.

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SAMPLE PLAN FOR "ENGAGING VOTERS" PHASE

UNIVERSE DESCRIPTION	STRATEGY & COST PER CONTACT	UNIVERSE SIZE	# OF PASSES	BUDGET (Cost per contact X Universe size X # of passes)
Sporadic Turnout Base	Phone ($X/contact)	Y	Z	X*Y*Z
	Canvass ($X/contact)	Y	Z	X*Y*Z
	Mail ($X/contact)	Y	Z	X*Y*Z
High Turnout Persuasion	Phone ($X/contact)	Y	Z	X*Y*Z
	Canvass ($X/contact)	Y	Z	X*Y*Z
	Mail ($X/contact)	Y	Z	X*Y*Z
Sporadic Turnout Persuasion	Phone ($X/contact)	Y	Z	X*Y*Z
	Canvass ($X/contact)	Y	Z	X*Y*Z
	Mail ($X/contact)	Y	Z	X*Y*Z
New Base Voters	Voter Registration ($X/form)	Y	Z	X*Y*Z
	Phone ($X/contact)	Y	Z	X*Y*Z
	Canvass ($X/contact)	Y	Z	X*Y*Z
	Mail ($X/contact)	Y	Z	X*Y*Z
TOTAL				$0.00

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WINNING PHASE (GOTV)

Creating your strategy for the Winning Phase to Get Out The Vote is very similar to planning for the previous phase. You should create a table that looks like the one on the previous page and that can go into your campaign budget. The table below provides more detail about suggested GOTV field strategy for an intensely competitive race. (Most local campaigns will not have resources to make this many passes through all of the voter universe, so you'll have to choose selectively based on your theory of how to turn out the most votes for your candidate.)

SAMPLE PLAN FOR "WINNING" PHASE

	URBAN PRECINCTS	SUBURBAN PRECINCTS	RURAL PRECINCTS
HIGH TURNOUT BASE	None	None	None
SPORADIC TURNOUT BASE	1 mailing 2 canvass passes during early vote 2 phone passes during early vote 4 canvass passes during GOTV 3 phone passes during GOTV	1 mailing 1 canvass pass during early vote 2 phone passes during early vote 4 canvass passes during GOTV 3 phone passes during GOTV	1 mailing Mail Vote By Mail ballot requests 2 phone VBM ballot chase passes 2 phone passes during GOTV
HIGH TURNOUT PERSUASION **(TO ID'D OR MODELED SUPPORTERS)**	1 mailing 2 canvass passes during early vote 2 phone passes during early vote 2 canvass passes during GOTV 2 phone passes during GOTV	1 mailing 1 canvass pass during early vote 2 phone passes during early vote 2 canvass passes during GOTV 2 phone passes during GOTV	2 mailings Send Vote by Mail ballot requests to positive IDs 2 phone VBM ballot chase passes 2 phone passes during GOTV
SPORADIC TURNOUT PERSUASION	2 passes through universe by phone & canvass to ID & persuade 1 mail piece	2 passes through universe by phone & canvass to ID & persuade 1 mail piece	2 passes by phone & 1 mail piece
NEW BASE VOTERS	Same as Sporadic Base	Same as Sporadic base	Same as Sporadic Base

Once you have your voter contact strategy complete for the Winning phase, you can calculate how many volunteer shifts you need to complete your canvass and phone shifts and begin recruiting. It's never too early to start recruiting GOTV volunteer shifts!

At the end of this chapter you'll find other sample GOTV planning materials, including a sample Election Day timeline.

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RUNNING A PAID PROGRAM

When writing your field budget, we highly recommend using your staff budget to hire good Organizers as early as possible so they can build the volunteer capacity you need to win. One Organizer with five teams of active volunteers leaders will reach more voters than one paid canvasser going door to door by herself.

That said, you will sometimes receive unexpected funding from your coordinated campaign or party committee late in the campaign to run a paid voter contact program. Paid phones can help supplement volunteer programs where your volunteer teams are weak, and quickly ID or turnout new supporters. Paid canvasses are more tricky.

Here are a few tips for creating a strong, integrated paid program:

- **Run everything inside your own campaign.** If you're going to have a paid canvass, then hire a Canvass Director onto your staff so that you can hold that person and the whole program directly accountable. Also hire the Canvassers directly so that they are directly responsible for all the work you're paying for.

- **Recruit carefully.** Don't just use the same paid people who always work Election Day. Recruit reliable high school or college students for door-to-door work, or pay your Organizers' best volunteer leaders to become Deputy Field Organizers.

- **Create an Intern or Deputy Field Organizer position.** Show those you're paying that you take their responsibilities seriously. Create a program with clear roles and responsibilities. Ask more of them. Make sure they spend their evenings and weekends at the doors, but also give them responsibility for working with their Organizer to manage volunteers, enter data, and recruit more volunteers through their own networks.

- **Give clear goals and hold them accountable.** Give your paid staff very clear goals just as you would with Organizers or volunteers. Not just tactical goals, but also supporter ID or voter turnout goals.

- **Train well**. Train your paid staff on core organizing skills. Don't assume that just because you're paying them you don't have to motivate them. Lack of motivation will certainly come through at the doors. Spend time training paid staff to tell their stories and to have quality conversations with voters. Then make sure they tally up after each shift and debrief together what worked and what didn't so they're getting better over time.

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YOUR RESPONSIBILITIES AS A MANAGER

Budget Your Candidate's Time

Creating opportunities for your candidate to meet with volunteers helps keep your candidate and volunteers motivated, and provides your candidate with good stories from the field.

Those who are recruiting significant volunteer hours for your campaign are as important as your fundraisers and need to be recognized. Early in the campaign, schedule candidate time for house parties or organizational meetings to motivate supporters to volunteer. Later in the campaign be sure that any time your candidate meets with key supporters before a big event, such a group includes your best volunteer leaders.

Make sure your Field Plan fits with your Integrated Communications Strategy

Be sure if volunteers are on the phones or at the doors, they are reinforcing the messages being driven to voters through TV, radio, mail and email. Work with your Communications Director and Field Director to schedule sequential touches to the same voters, for example, a mail piece followed by a live call, followed by a door visit with literature, followed by another call.

Manage your Field Director

Schedule brief daily check-ins and regular one-to-one meetings with your Field Director to review progress to goals, to adapt the field strategy, and monitor progress to goals. Continue to ask yourself these questions:

- Is the field operation meeting goals and benchmarks?
- Am I giving the field operation the resources they need to reach their/our goals? (phones, paper, etc.)
- Is the field team using all of the tools available to the campaign to ID supporters and turn out voters? Are they going through all their volunteer prospect lists on a regular basis and recruiting creatively from other places?
- Looking at the campaign overall, are there other opportunities in finance, online, earned media, paid media, etc., that can be used for identifying supporters and volunteer prospects?
- How am I checking in with the Field Director every day?
  Daily check-in conversation?
  Daily email from Field Director to manager, candidate, consultants and key advisors?

Integrate field work into the rest of the campaign

Be sure that all staff are trained to run a very tight supporter card program where every person at any campaign event is asked to sign a supporter card with their contact information (including zip code and address so they can be matched in the voter file, and email address), indicating whether or not they support your candidate and whether or not they will volunteer.

Put a volunteer ask on every single agenda, including events with the candidate, fundraising events, house parties, etc.

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CONCLUSION

This chapter is longest for a reason. Your job as a manager is primarily to facilitate strategizing on a regular basis with your candidate and your staff and consultant teams. This means leading campaign-wide planning retreats just before each phase begins, coaching your Finance, Communications and Field Directors to build their program strategies, and leading daily and weekly check-ins to track progress to goal, evaluate and adjust your programs.

Excellent campaigns aren't those that have beautiful plans created solely by Campaign Managers that they stick to regardless of consequence. Excellent campaigns are those where the Campaign Manager and leaders create clear goals, straightforward strategies and creative programs that are fine tuned by every single person in the campaign day to day.

Learning to strategize effectively—to turn the resources you have into the capacity you need to win—is your core work as a manager. Have fun!

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SAMPLE STORY PLANNING GRID

Headline Identify the news item of your story and frame it in a headline *What's the headline of this story?*
Lead Write a succinct paragraph in journalistic style to frame the story *What's new? Why would the news media cover this story?*
Photo Visualize the photo you want – should highlight the candidate *What will people do at the media event that is visually interesting?*
Sound Bite Know what your sound bite is going to be and ensure the candidate delivers it *How do we state our message in 15 seconds or less?*
Supporting Facts Provide local angles, facts and figures from objective sources *What information do we have to support the claims we're making?*
Surrogate/Validator Quote(s) Pick speakers who shore up your position *What issue experts or constituency leaders will talk to the press for us?*
Q&A/Opposition Response Prepare for media questions and opposition attacks *What will the reporters ask? What will our opponents say?*

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SAMPLE PRESS LIST

Type	Name	Outlet	Outreach Approach	Contact Info	Notes
Political beat reporter	Jane Jones	*Daily Times*	Gets every press release	Phone: Email:	
Opinion	Bo Hans	*Weekly Report*	Targeted releases	Phone: Email:	
Current Affairs, Specialty	Adam Everett	*Free-Press*	Outreach on health care	Phone: Email:	
Apolitical local media	Joe Mott	*Anytown Monthly*	Targeted releases, outreach about interviews	Phone: Email:	
Blogs	Hal Menz	*Localpolitics.org*	Targeted news links, political intelligence	Phone: Email:	
Talk Radio	Harvey Smith	WKTX	Local politics show, 10am Sundays	Phone: Email:	

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PRESS RELEASE TEMPLATE

Date
Contact: First Name Last Name
contact@email.com
Cell Phone #:

For immediate release:

Headline As You Want It To Be Printed

Subheadline As You Want It To Be Printed

Date
City, State

First paragraph, ending with what you want a newspaper's lede to be. Lorem ipsum dolor sit amet Lorem ipsum dolor sit amet Lorem ipsum dolor sit amet Lorem ipsum dolor sit amet

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PRESS RELEASE TIPS

Headline Identify the news item of your story and frame it in a headline

Lead Write a succinct paragraph in journalistic style to frame the story

Photo Visualize the photo you want – should highlight the human impact

Sound bite Know what your sound bite is going to be and ensure everyone delivers it

Supporting Facts Provide local angles, facts and figures from objective sources

Surrogate/Validator Quote(s) Pick speakers who shore up your position

Q&A/Opposition Response Prepare for media questions and opposition attacks

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BEFORE YOU HIT SEND EMAIL CHECKLIST

Header

- ☐ Sender's name is spelled correctly
- ☐ Sender's name is formatted as Firstname Lastname, NOI
- ☐ Reply-to address is info@neworganizing.com (unless this is a very small send)
- ☐ Subject line is spelled correctly

Body

- ☐ Paste entire email into Word and run spell-check. No errors found.
- ☐ Read entire email OUT LOUD slowly
- ☐ Email flows sensibly
- ☐ All instances of they're/their/there, your/you're, its/it's, and loose/lose are correct
- ☐ All em-dashes appear as double dashes (--)
- ☐ Any statistics are accurate and have been verified
- ☐ Permission has been granted for any quotes
- ☐ Dates are formatted as May 5th, June 3rd, January 2nd, etc.
- ☐ All times have a.m. or p.m. and EST or respective time zone included
  All locations and names of places are formatted correctly (e.g. Dupont Circle, not DuPont Circle)

Signature

- ☐ Name of sender in signature matches name in From field
- ☐ Sender line, title, and organization are formatted like so:
  Judith Smith I Campaign Manager I Luisa Jose for City Council

Footer

- ☐ P.S. items are formatted as "P.S." followed by a space, with no hyphens
  Any Creative Commons images are properly attributed below the P.S. field, italicized and linked to Flickr user's profile and specific Creative Commons license page: Original photo by [username] shared with [Creative Commons license].
- ☐ Test unsubscribe link by unsubscribing. It works

Graphics

- ☐ There are no spelling errors in the graphics' text
- ☐ There is appropriate alt text for all graphics
- ☐ There is sufficient space between graphics and the email text
- ☐ There is no outline around linked graphics

Links

- ☐ All links are bold
- ☐ Click on each link. Each link goes to the correct URL.
  Copy and paste each "http://" link into your browser. Each link goes to the correct URL.
- ☐ If applicable, test sign-up, donation, or any other form you link to. Ensure that auto-response emails are correct.
- ☐ Text Version Only
- ☐ No unusual line breaks
- ☐ No unusual symbols
- ☐ Any linked text has been changed to full http://example.com link text

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SAMPLE ORGANIZATIONAL MEETING AGENDA

Purpose: to bring together supporters, motivate them through story work and relationship building, orient them to our strategy and how they can make a difference. The ask is the same for everyone: Get involved in the next volunteer team voter contact action in your area, or if there is no team yet in your area, gather with others here tonight to schedule one meeting & voter contact action. (First commitment is to action.)

0:00 INTRODUCTION

Local leader tells his/her story, welcomes and thanks people for attending and introduces the organizer.

ORGANIZER'S STORY

Tell your brief 2-minute story. Don't talk about the candidate. Attendees want to know who you are, where you came from, what choices you've made in your life that led you to this work.

PARTICIPANTS' STORIES

Participants share their stories (if a small group). What is your family experiencing now that brings you to care about this election and this race? If it's a large group they can pair up for 10-minute one-to-one to share stories.

DISCUSSION: WHAT DO OUR STORIES SHOW US WE HAVE IN COMMON?

0:25 CANDIDATE'S STORY

In small races be sure the candidate is present. In larger races show a video of the candidate telling her own story of where she comes from, what brings her to act now, what's her vision for our community?

0:30 CAMPAIGN STORY

Tell the story of this region and its role in this campaign. Incorporate local heroes and regional stories into this story. Explain this area's goals on this campaign and where those goals fit into the plan to win.

0:35 VOLUNTEER STORY

A different leader tells her story of why she's volunteering, experiences with volunteering, and what she has learned about herself, about voters and about this campaign.

0:40 SUCCESS/ACCOMPLISHMENTS

Give a clear picture of how many people we have reached, how many people are volunteering, and how we've found supporters in this area, but also clearly laying out the challenge ahead. Good visuals are key. Help people understand where they fit into your campaign's structure and strategy. Be transparent about goals so others feel motivated to help achieve them.

0:45 DESCRIBE AND ROLE PLAY THE TYPES OF ACTIVITIES TEAMS DO TO MEET GOALS

A volunteer shares with audience ways to volunteer.

Explain phone bank and canvassing, what it is, why it is important and how it helps to reach our goals. Consider role playing a voter contact conversation to show how easy and enjoyable it is.

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0.50 ACTION STORY & VOLUNTEER ASK

Tell your story of action, laying out the challenges we face, the possibilities if we win, and the path to winning, which includes talking with targeted voters.

Ask participants to make the choice to take responsibility for the change they want to see by joining an upcoming volunteer team activity if one exists, or scheduling one if one doesn't exist. Your team together can choose which activity you will do (phone bank, canvass). Convey urgency—100 days. (Avoid the temptation to give people a checklist of things to do—it can be overwhelming, and undermines the value of any one choice)

Invite participants to make the choice now.
(Have sign up sheets for each activity ready and available. If there are people from a place where there is no team give them time to schedule a meeting. Write all appointments and meetings on a large calendar that everyone can see.)

0:00 CELEBRATE COMMITMENTS & CLOSING REFLECTION

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SAMPLE TEAM ACTION AGENDA

Welcome & Relationship Building (10 min)
Why: Keeps us connected with our own stories & why we're involved, helps us find common ground with others.
How: Quick one-to-ones, or a couple volunteers tell their stories.

Review Strategy & Our Team Story (5 min)
Why: Reminds us why we matter, what our role is, how we can make a difference, how what we do today fits into our team goal & the broader campaign.
How: Review the campaign strategy, the team's goal and progress to goal. Set a clear goal for today's action (like IDing 50 supporters).

Training for Today's Action (15 min)
Why: Provides new team members or volunteers with action skills, refreshes skills for others, provides opportunity to role play in safe environment (phone banking, canvassing, etc.).

Voter Contact Action as a Team (2 – 3 hours)
Why: To Win! The biggest part of the day. We have clear start & end times, with coaching/check-in by team leader or organizer. This keeps everyone on track and helps troubleshoot so we can self-correct mid-action.

Tally Up (5 min)
Why: Gives us a sense we're making progress. Reminds us that we need each other to win and can do more as a team than as individuals. Sets aside time to add up our outcomes. We can see how far this puts us toward our goal for today and toward our ultimate campaign goals.

Evaluate Action (5 min)
Why: Helps us learn from both success and failure and improve over time. Helps us digest key learnings so we don't forget them. Helps us evaluate both success and failure so we can do better next time.

Strategize for next week's action (10 min) (longer strategizing sessions may need to happen outside team time)
Why: Engages participants in decision-making and creative strategizing about what activity we'll do or where we'll focus to make better progress to goals. Gives volunteers ownership. Helps volunteers learn the ins and outs of their own neighborhoods and cities—knowledge they can take into future campaigns.

Celebrate
Why: Who wants to be part of an organization that doesn't have any fun??!!

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SAMPLE ELECTION DAY TIMELINE

Polling location opening and closing times differ by state. Check your state's laws!*

November 1st: November2nd: 5:15 AM 6:15 AM

6:45 AM 7:00 AM 8:00 AM 8:45 AM 9:00 AM 11:00 AM 12:00 PM 1:00 PM 3:00 PM 4:00 PM 4:15 PM 6:00 PM 7:00 PM

End of Night

Set up staging locations / confirm all volunteers

ELECTION DAY

Wake up calls to all staff and volunteer captains

Organizer (Staging Location Director), Canvass Captain, Phone Bank Captain, Rides/Comfort Captain open staging location

Visibility at high-traffic areas begins

Polls Open/Rides Captain checks that polls are open Shift #1 volunteer reminder calls

Visibility Ends

Shift #1 phone bank and canvass operations begin

Shift # 2 volunteer reminder calls

Shift #2 phone bank and canvass operations begin Comfort Captain serves lunch

Shift # 3 volunteer reminder calls

Shift #3 Phone bank and Canvass operations begin Comfort Captain serves afternoon snacks

Everyone out on the doors

Polls close (Have all canvassers go to closest polling place to keep people in line)

Polling location opening and closing times differ by state. Check your state's laws!*

Organizers, captains, and volunteers break down and clean up staging locations.

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Chapter 7

LEADING AND MANAGING

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CHAPTER 7:
LEADING AND MANAGING

INTRODUCTION

Your job as Campaign Manager is to win. No matter how small the race, you can't win alone, so that will require engaging other people to carry out the work with you.

From Day 1, your job will be to build an organization that motivates, engages and holds others accountable, including your candidate, consultants, staff and volunteers. This requires building the right team in the first place, setting clear goals, delegating responsibility for those goals to others, supporting them with the training and coaching it takes to meet those goals, holding them accountable, creating a culture and meeting structure that foster collaboration and communication, and sometimes having to address performance problems and let people go.

There is no back-up for your job. The buck stops with you. If there are strengths in your organization they are yours to celebrate with your team. If there are problems in your organization (and there always will be), it is your responsibility to figure out who can fix them and how.

People are as important a resource to your campaign as money, and taking the time early on to structure your campaign to recruit, develop and deploy leaders will pay dividends when it matters most.

This chapter draws heavily on the work of Jerry Hauser and Alison Green from their book, *Managing to Change the World*.

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MANAGING THE WORK

Your job as a manager is to balance the work and the people. The key to managing work effectively is breaking it up into clear, measurable outcomes, roles and responsibilities that can be delegated to others.

ESTABLISH CLEAR ROLES AND RESPONSIBILITIES

An Engagement Campaign structure is one in which responsibility, capacity, and accountability are distributed over many people. Because so many people are involved, it is essential that everyone understand their purpose, both individually and collectively, in the organization. Establishing well-defined roles will help you set up a transparent organizational structure that improves the focus and performance of your team, decreases drama, and generally makes for a smoother operation.

Roles should be created based on the work that needs to get done, not based on arbitrary hierarchies. These roles may be filled by volunteers, depending on your campaign budget.

ROLE	RESPONSIBILITIES
Candidate	
Campaign Manager	
Finance Director	
Finance Assistant	
Communications Director	
Communications Assistant	
Field Director	
Organizer	
New Media Director	
Data Manager	
Political Director	
Scheduler	
Administrative Director	

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In an Engagement Campaign, it is especially important to articulate the responsibilities of staff members and volunteers as *outcomes* they are expected to achieve, rather than tasks they are expected to perform. If you simply assign tasks, your staff and volunteers will continually come back to you with more work. However, if you hand over big chunks of responsibility for the work, you can hold your staff accountable for following through on those responsibilities.

DELEGATING

Once you've developed a clear plan with clear goals and clear roles, you'll need to delegate significant pieces of the plan and the goals to others.

This will probably not be easy at first. Chances are you're becoming a Campaign Manager because you love the field work or the finance work or the communications work you've done on past campaigns, and you're probably pretty good at it. However, if you spend time doing that work instead of managing—because it's more comfortable or because you want it done "right"—your chances of winning diminish significantly.

Managing your team of candidate, staff, consultants and key volunteers is a full-time job in itself. Good delegation requires that you hold others responsible for their part of the work without taking the work back from them. Your job is to establish clear goals and outcomes, then lead and manage others who take responsibility for those outcomes.

Delegating roles with significant responsibilities attached requires that you have an explicit delegation conversation with each of your staff, hold them accountable to meeting goals, and support them with the training, coaching and learning resources they need to do their work.

Delegating well takes time early on, but results in more work getting done in the long term. Here's how Jerry Hauser and Alison Green lay out the steps for delegating any responsibility, whether to staff, consultants or volunteers.

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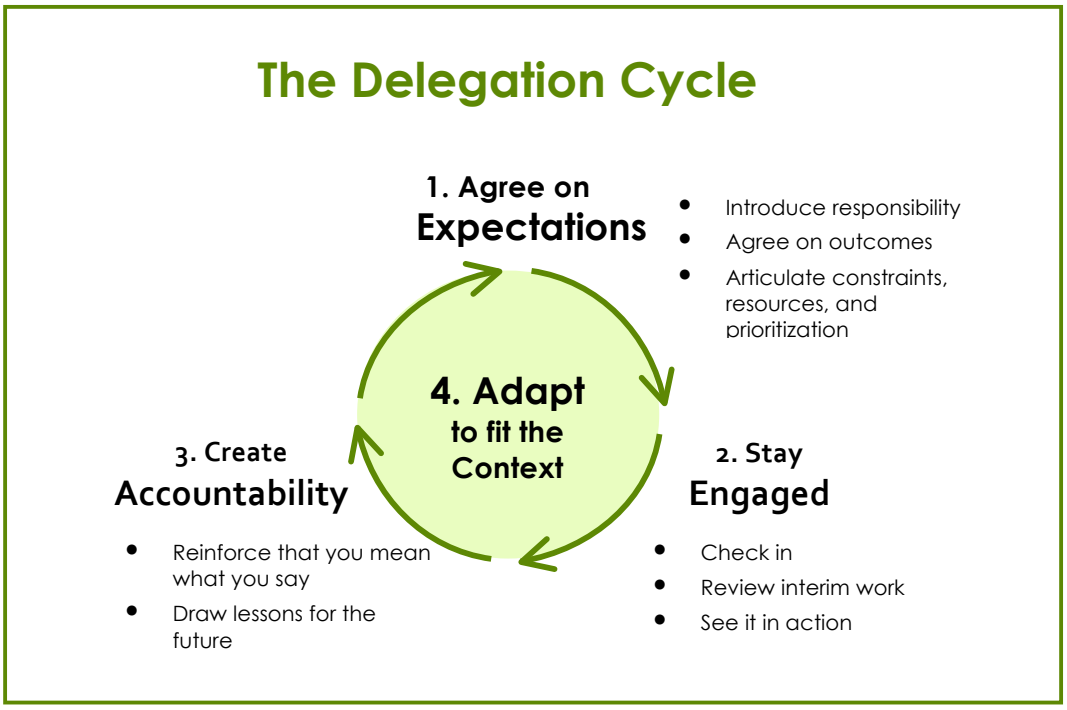

From Jerry Hauser and Alison Green, *Managing to Change the World*

As part of the delegation conversation you should clarify for each staff person which other staff they might collaborate with. One way to do this is by writing out the MOCHA for each major project or goal. The MOCHA clarifies who is the Manager and who is the Owner for each project (they are not the same person), who should be Consulted, who are the Helpers, and who is the final Approver. The most important person in this structure is the Owner—the person ultimately responsible to deliver an outcome. For example, if the outcome is to raise $1.4 million, the Finance Director is the Owner, you are the Manager, the Candidate should be Consulted, Finance Assistants are the Helpers and you are the Approver.

The MOCHA chart on the following page lays out the topline responsibilities in the campaign, but the same structure can be used by your staff to delegate smaller chunks of work as well. For example, a Finance Director might use this to delegate a finance event to an assistant, clarifying the outcomes expected and who else should help with the event.

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	Description	Money	Message	Mobilization	Schedule
Manager	Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if things are off-track.	You	You	You	You
Owner	Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or via helpers) and that others are involved appropriately.	Finance Director New Media Director	Communications Director New Media Director	Field Director New Media Director	Scheduler
Consultant	Should be asked for input and/or needs to be brought in to work.	Fundraising Consultant	General Media/Message Consultant New media consultant Pollster	Targeting or mail Consultants	None
Helper	Available to help do part of the work.	Finance Asst. Data Asst.	Communications Asst.	Regional Field Directors Organizers	Candidate's other workplace
Approver	Signs off on decisions before they're final. May be the Owner or Manager.	Campaign Manager & Finance Director	Campaign Manager & Comm. Director	Campaign Manager & Field Director	Campaign Manager

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Delegate at all levels

Your senior staff can use the same processes described above for delegating big chunks of responsibility in their work to others, whether it's votes, money, recruiting volunteers or developing communications. The work of the campaign is virtually the same top to bottom in each field, whether it's raising money or turning out votes; it's just that goals are broken down and spread out over many people.

For example, if the Field Director is responsible for turning out 50,000 votes, which will require 1,000 volunteers for GOTV, she can delegate a goal of recruiting 25,000 votes and 500 volunteers to each of 2 Regional Field Directors. If they have 5 Organizers each, they can delegate to each Organizer a goal of recruiting 10 volunteer leaders and 100 volunteers to turn out 5000 mobilization and persuasion votes. Each volunteer leader can then be delegated responsibility for turning out 500 targeted voters by Election Day, which would mean recruiting 10 other volunteers to turn out 50 voters each.

Suddenly the enormous goals of the campaign become achievable when more people are engaged, and are given responsibility for achieving clear goals and not just tasks.

Engagement Campaign staff should be highly leveraged, meaning that an organizer whose ultimate responsibility is to turnout 5000 votes on Election Day can't possibly meet her goal alone. She must recruit, train and manage a team to accomplish the goal. When assigned the responsibility of turning out 5000 votes, an impulse might be to jump on the phone immediately to start identifying voters NOW but a simple review of the math drives home the need to first develop a team to identify supporters. If the organizer makes 100 phone attempts a day, reaches 25 voters and identifies 25% of those as supporters, she has identified 5 voters as supporters -- a decent day on the phone. But she'll need 3 years to meet her campaign goals. However, if she leverages her time by focusing on recruiting volunteers and helping them develop into volunteer leaders, she will dramatically expand her capacity and ability to reach her assigned goal.

Winning the campaign will require that you teach your staff at all levels to delegate leadership and responsibility well, so that together you can build the capacity it takes to raise money and deliver votes.

Repeat Back for Clarity

When you delegate to others, ask them to repeat back what you are asking them to take responsibility for, then work together to put it in writing so that you both have clarity on the work and a reference point for follow up.

CREATING WORK PLANS

Once you have delegated responsibility to others, you can require them to create work plans to demonstrate their strategy for meeting goals. These plans should lay out clearly the measurable goals to be met, the measures of success if goals are met, the milestones along the way, and activities to reach the goals.

These work plans should be a core part of your regular coaching and accountability meetings with staff. Staff can use the same worksheets to hold volunteers accountable to their own goals. **(See Sample Plan at the end of this chapter)**

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MANAGING THE PEOPLE

Dividing up the work of the campaign and delegating it is only the first step. Once your staff, consultants and volunteers are clear about the goals and responsibilities they have to meet, you need to continue managing them to meet the goals. This requires building a working relationship, holding regularly scheduled check-in meetings, and coaching your team. Some managers think that pep talks or the opposite—tearing people down—can solve work problems, but they rarely do. Strong managers recognize that strong working relationships are the foundation of a successful team and put time and effort into building one to one relationships with the key people on their team.

MANAGING YOUR CANDIDATE

Your candidate is going to have many demands on her time and attention. In the network of people placing demands on your candidate, you are the only one ultimately responsible for the success of the campaign. That means you'll need to be serious about managing up, which is really not that much different than managing the other staff who work for you.

Establish a solid working relationship

Take time very early in the campaign to meet with your candidate just to get to know each other. You'll need to officially interview your candidate to develop the campaign narrative, but spend time before that just getting to know her as a human being, and letting her get to know you, where you've come from and why you've chosen to work on her campaign.

You'll need to understand deeply what motivates your candidate, because it will often fall back on you to motivate your candidate to do fundraising call time, to practice for debates, to speak to the press, and so on.

Your relationship to the campaign needs to be based on respect and understanding of your candidate. If you do not respect your candidate, or vice versa, it will quickly become clear to other staff and supporters and undermine your leadership and the success of the campaign.

This relationship is like any other. It will take constant attention and development, so work with your candidate to figure out a regular schedule for checking in and prioritize this time together.

Establish ground rules for your relationship

Spend some time early on establishing clear ground rules for how you and your candidate work together. What decisions will you make? What decisions require the input of your candidate? How will you both interact with consultants and staff? How will you deal with conflict? What role will the candidate's family have in decision making and on what types of decisions? Raise a few hypothetical situations and discuss how they would be addressed.

Establishing these ground rules early can save you drama and time down the line.

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Communicate proactively

Set up frequent and regular check-in times with your candidate, and at least one extended meeting per week. Be proactive in offering your candidate updates on the campaign. Don't be shy or feel like you're pestering your candidate. It is in her direct self-interest to know how the campaign is going, to get guidance on the best way her time can be used on the campaign, and to know of any major problems that arise.

Be honest

Your candidate needs straightforward, honest information about the campaign's status. Don't hide challenges or failures. Raise them proactively and be clear about what you're doing, or what the candidate needs to do, to address these problems.

Resolve conflicts in private

It is critical that you and your candidate present a united front to the outside world. Be very careful what you say in public, and be proactive about surfacing and resolving conflict with your candidate immediately.

Find a clear role for the candidate's family and advisors and keep them in the loop

The candidate's family and close advisors will have great influence over her. Be proactive in meeting and building relationships with them early on in the campaign. Build a list of key advisors that you need to keep up to date on a weekly basis.

Be creative in finding a clear role for the candidate's family in the campaign and keep them busy and involved in the day to day work.

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MANAGING YOUR STAFF & VOLUNTEERS

Spend time on training now, or waste time later

There are two ways to look at training: as time spent, or as time invested. Many managers claim there isn't enough time to train staff and volunteer leaders, and cut training time short to push people to other activities. However, having campaign-wide trainings such as staff retreats and volunteer conventions, provides unrivalled opportunity to get your whole team on the same timeline, goals, program and message. You can see your team at work and understand who's doing well and who's not, and reinforce a culture of learning, responsibility and accountability.

Trainings also provide opportunity for you to transparently acknowledge and address challenges, and to celebrate progress on your campaign, which is critical to keeping your whole team motivated.

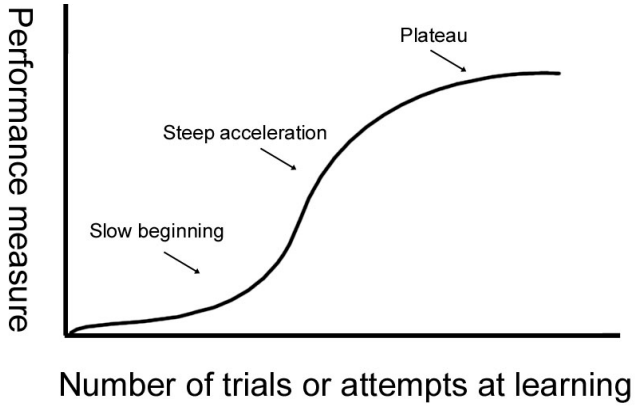
Many managers are tempted to make trainings as short as possible, which usually means spending all the time talking at people in order to get all the information out. The problem is that information delivered in that way doesn't stick, and rarely translates into action.

If your staff and volunteers are not doing what you expect of them after training, it's not because training is inherently bad, it's because you didn't take the time to get crystal clear about the goals and responsibilities you are asking your team to take on, or you didn't take time to give them the opportunity to practice new skills in a supervised setting where they could get instant feedback.

The best trainings for launching a new phase are longer (1-3 days), because they incorporate practice time after every skills session, creating a safe place for staff and volunteers to take risks, learn and get feedback before heading back out to the field.

Plan for early failure as part of long-term success

Every skill we learn as human beings require practice, which usually involves failure or mitigated success early on, and requires renewed motivation and recommitment to work through the learning curve until we've mastered the skill.



From: **Psychology: An Introduction** by Russ Dewey,
http://www.psywww.com/intropsych/ch07_cognition/learning_curve.html

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As a manager, this means that if you need your staff and volunteers to be working at top form by a certain date, then you need to schedule in early training and ongoing coaching to give them time to learn and practice new skills.

This is particularly true during GOTV. A campaign team that has been through two dry runs of Election Day is much more likely to stay focused and disciplined, and weather the unexpected during GOTV.

Follow up with regular coaching

Coaching is a critical piece of Leadership development—it's the fuel that pushes us through the learning curve more rapidly than if we simply engage in ongoing trial and error.

In order for staff to be successful, and be held accountable to meeting goals, you'll need to ensure that every team member receives frequent, regular, honest and critical feedback from his or her manager. This should be mirrored at all levels of the organization, from the way you coach your Finance Director, Field Director and Communications Director, to the way your staff coaches volunteer leaders.

Supervisors should spend time observing their staff at work, to be able to give accurate feedback and suggestions. Supervisors should also ask subtle but probing questions of volunteers or staff who report to the supervisee, and make sure that any major issues with the staff member are brought to his or her attention. All staff should know who to talk to if they have issues with their supervisor.

Feedback should be positive as well as critical. Constructive criticism should identify the problem and its root causes, and should be solution-oriented overall with commitment to action.

Your role as Manager is to establish a standard schedule for coaching, learning and accountability, so that staff and volunteer leaders get feedback on a daily and weekly basis. **See Sample Coaching Agenda and Sample Schedules at the end of this chapter.**

Address challenges head on

Your staff and volunteer leaders are often the first to feel push back and challenges on the ground. Pretending such challenges don't exist discredits you and your leadership. A critical skill as a manager is learning to interpret challenges and failures in a way that acknowledges them while at the same time reaching out to ask staff and volunteers to take responsibility for overcoming those challenges or setbacks.

Never promise a win

You will never know you've won until Election Day. Learn to master the balance between laying out a pathway to winning while at the same time sketching out clearly the work that path will require.

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Hold your team accountable to the values of your campaign

Managing is not just about performance, it's also about supporting your staff, consultants and volunteers in living up to the values of the campaign. Reinforce those values by telling stories of those who are representing the campaign well. Address infractions of your campaign culture immediately and directly.

Celebrate success

We are all motivated by recognition and success. Be sure that a part of every day and every week is dedicated to celebrating the success of individuals and teams in your campaign. During the 2008 Presidential primary, the Obama campaign in South Carolina found a direct correlation between the performance of volunteer teams on key outcomes, and the frequency with which they celebrated as a team.

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MANAGING CONSULTANTS

Managing consultants is one of the most important things you do as a manager. Consultants generally provide work product that is strategically central to the campaign (all your paid communications, for example), work that consumes the vast majority of your budget.

Consultants are also a major resource for strategic advice and overall coaching for you as a manager. They can help you lobby your candidate to do more call time, help you draft a press release, act as a sounding board when you're conflicted about how to handle a situation, or just offer general encouragement and perspective throughout the campaign. But, like any other member of your team, you won't get the most out of your consultants unless you manage them well.

Set up clear expectations at the beginning

Just like with other key players, you'll need to take time to build a relationship with your key consultants early on and set up clear expectations for working together. How often will you talk? When? What are key deadlines and goals?

Remember, your consultants work for you

They are different than other staff because they don't work on the campaign full time and you are not their only 'boss'. They are also typically much older than you and have many more cycles of campaign experience. But, like other staff, they are accountable for getting work done within your organization. Your job is to ensure they provide outstanding work product and execute their goals on time just like everyone else.

Make requests specific to your campaign

Consultants are often doing the most skilled work of your campaign, which requires more clarity on delegation and accountability—not less. Every campaign is different, and it's your responsibility to be clear about what your campaign needs so that you don't receive boilerplate materials from past campaigns that aren't consistent with the goals and values of your candidate and campaign.

Ask for help

Leading a team of consultants as a manager doesn't mean having all the answers, knowing more than they do, or being smarter than them. It means having a clear vision for the strategy and timeline of the campaign and how each consultant contributes, having a good handle on your budget so you know what you can afford, and having the maturity to listen to all sides, make good decisions, and get them implemented. In general it means seeing your consultants as resources to help you succeed and demanding the highest possible quality work from them.

Good managers keep their team informed about what's going on in the campaign so they can keep reaching out to their team constantly for help.

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Have an agenda and stick to it

Oftentimes, the most challenging part of managing consultants is leading discussions. Many campaigns have weekly conference calls with senior staff and consultants where strategy for the coming week is discussed. When the campaign begins developing television and radio scripts, or mail pieces, you will need to have regular conference calls to critique scripts and copy.

Some managers are intimidated by the discussion, so they don't keep the discussion focused, or do enough to challenge their consultants, or get everyone's input. Others never organize a call at all because they're scared of having to lead it, or threatened by others' input. Both scenarios are recipes for disaster and a quick way to generate bad outcomes and a confused, frustrated team.

Set up regular times for conference calls with your consultants and stick to them. Prepare and circulate an agenda for every call. Think of yourself as a facilitator and ask consultants to debate each other to get to the best decision.

Once a decision is made, stick to it, and don't get sucked into having repeat conversations about past debates.

It's your job to lead your team, including consultants, and to keep your campaign running on track.

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BEST PRACTICES FOR MANAGING CONSULTANTS

Ask and keep asking. Your consultants are a resource—the more you ask for their help in all parts of the campaign, the more invested they will become in your campaign and the more you will get out of them.

Listen, and keep listening. As the leader of the campaign, you are obligated to listen to input from all members of your team and discern from that advice the best path forward. Be deliberate about asking your consultants good questions so you can make strong choices with confidence.

Establish regular communication. Set up regular conference calls with your consultants. Your team will be most helpful if you keep them in the loop. Create a distribution list where you can send your entire team press clips, important developments in the campaign, and celebrate accomplishments.

Discuss important decisions with all relevant consultants and staff at once. Getting everyone together to make an important decision in one meeting is more efficient and will often yield a better decision. Don't have such a large group that the discussion is not productive, but avoid making yourself have 10 different one-on-one discussions where people can't challenger each other's points of view.

Push, and keep pushing. Demand the highest quality work from your consultants. Always. And then celebrate their good work.

Set ground rules with your candidate about how you interact with the consultant team so it's clear how decisions are made. Be sure you are on all calls with consultants.

Remember that your consultant is a business person, as well as a strategist. Their recommendations need to be matched back against your strategy and your budget. It's ultimately up to you how you spend the campaign's money.

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MANAGING TIME

As a campaign leader, one of your big responsibilities is to manage the clock. It is usually the only asset on a campaign that diminishes and confines strategic options as time passes and the election approaches. (Money and people, by contrast, typically increase in the homestretch.)

In addition to keeping an eye on the calendar with a big countdown chart, like 99 days 'til election, campaign leaders must also manage the daily and weekly calendar.

Staff and volunteers need routines and rhythms to regulate activities. Programs need to be translated into sample daily schedules so organizers and other staff have clear expectations about how to manage their time in order to achieve the objectives of the campaign.

Establishing a predictable routine that is consistent across roles helps strengthen your ability to set the tone, execute a program, and proactively manage your greatest asset – human capital.

PRINCIPLES OF TIME MANAGEMENT

Hauser and Green argue that good time management requires that you put the "big rocks" in the campaign schedule first—the big obligations that must be fulfilled in order to build the campaign. This is true for each phase, but just as true for each week and for each day.

Once you've put the big rocks in—fundraising, communicating with voters, managing staff—then you can put in the little rocks, like check-in meetings and key conference calls.

MANAGING YOUR OWN TIME

Your number one job is to manage the clock

It will be human nature to push back against deadlines and timelines, so you need to hold yourself and your team to them once they're set. The more negotiable the deadlines become, the harder it will be to get traction as a campaign.

You are a manager, so spend your time managing

You are responsible for managing your own time well, so that you can support all members of your team in carrying out their work well. Delegate everything possible to staff, consultants and volunteers. Managing a team well is a full-time job in itself, and you won't be able to do it well if you're also trying to do the work yourself. Managing means that most of your time will be spent in meetings—with your candidate, with consultants, coaching staff, and so on.

Take care of yourself

Campaigns are never easy and require very long, hard hours. However, you have to set limits so that you have time to eat and sleep. If you don't take care of yourself, your campaign will turn into chaos around you. Others are counting on you for leadership and guidance in their work.

MANAGING YOUR CANDIDATE'S TIME

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Your candidate's time is the most important and most limited resource you have. That means you need someone in charge of scheduling. If you can't afford someone early on, then find the best detail-oriented intern you can.

Hold scheduling meetings daily

Hold regular, short scheduling meetings to be sure you and your scheduler are on the same page. To make effective scheduling decisions, it is imperative that the scheduler understands the campaign plan, strategy, message and targeting, so be proactive in keeping him up to date.

Be strategic

Always use your candidate's time where you can get the biggest return of resources for your campaign—to raise money, to motivate supporters, to persuade the largest possible audience of your target voters.

If their time is not well spent bringing in resources, then let them rest so they're prepared for campaign time. Don't spend candidate time just garnering small political favors.

The candidate is not in charge of the schedule

This is one of those ground rules it will be critical to establish with your candidate early on. She will be getting pressure from all sides to spend time in places that are not strategic for the campaign. She needs to be clear that she cannot commit to any meetings without first talking with your scheduler.

If your candidate is already in office, your scheduler will need to coordinate with the office scheduler. However, the campaign's needs take priority.

Set priorities

Call time for fundraising is #1 and should be non-negotiable by the candidate or other staff. The campaign will not survive without sufficient fundraising by your candidate. Fundraising events are also key events for the candidate.

Early on during the Engaging Supporters phase, your candidate should be spending time with key supporters—not just the biggest donors, but also the volunteers who are doing the most work and recruiting the most people for the campaign.

During the Engaging Voters phase, the candidate should be talking to voters on a regular basis, through earned and paid media and through personal appearances with persuadable voters.

Be sure to schedule rest breaks and family time – the candidate is a human being too.

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Be clear what needs to be on the schedule

Draft a scheduling template with your candidate and scheduler that includes all the information each of you needs: times, locations, phone numbers, etc. Then stick to that template.

Expand your candidate's time: recruit surrogates

The easiest way to stretch your candidate's time is to recruit surrogates who can be trained to deliver the campaign's message to targeted audiences. Surrogates may be members of the candidate's family or circle of advisors, elected officials, community leaders or celebrities. As you recruit surrogates be certain that your Communications Director spends time with them, helping them practice the campaign narrative.

Learn to do the politics

With such a limited resource, you and your scheduler will frequently have to say no to scheduling requests. Learn to combine requests where possible, or make sure that someone declined for a scheduling request can be recognized by the candidate in some other way.

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MANAGING STAFF TIME

Meetings are where the campaign happens

As a campaign leader, you will spend as much as 80% of your time in meetings – staff meetings, donor meetings, decision making meetings, scheduling meetings, and so on. Meetings are where we share strategy, create plans, share experiences, bring problems to solve, review progress, reflect, celebrate our success and regroup after failure or disappointments.

In short, meetings are where the campaign happens. As a manager, meetings are the means by which you focus and direct your team, and meetings are where you will most directly cultivate a campaign culture of motivation, team work, focus and accountability.

Some managers try to cut out too many meetings early on but then face confusion, drama, and misalignment of goals among staff. Rather than trying to avoid meetings altogether, your job is to help all of your staff make meetings productive, efficient and worth their time.

Set explicit norms for how meetings will run

Creating norms for meetings helps you to make the most of everyone's time and energy. Norms are the explicit, stated and agreed upon ground rules for conducting the meeting. We suggest setting them early, rigorously enforcing them and adopting new norms as required.

- Meetings begin & end on time
- All meetings have an agenda with times allocated for each agenda item
- Participants are expected to be present & engaged
    - No iPhones, Blackberries, texting
    - "Lean in" to the conversation
- No side conversations
- Be respectful of your colleagues
    - No interruptions
    - Be relevant
    - Have the meeting in the room, not outside afterwards
- Each meeting has an assigned "action item" scribe who is responsible for noting action items, who is responsible for each item and a date by which the item should be complete

Setting norms is not enough if you don't also establish a self-correction. The self-correction for breaking the norms should be fun, not just punishment. For example, a push up for every minute you're late, or $1 in the collective celebration bank for every time you check your blackberry.

If you don't set a self-correction because "well everyone here is an adult and we don't need to do that," then the first time someone breaks a norm, the new rule is it's ok to make exceptions . . . and the rules go out the window.

Be clear about the purpose of each meeting

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Not all meetings are created equal. A functioning campaign has several different types of meetings that occur on a regular basis and a good manager should make a point of distinguishing between different types of meetings and make sure participants understand what meeting they're in.

A manager will need to hold several types of meetings that have different lists of participants, including:

Strategy & Planning Meetings – the purpose is to assess, reflect and plan the next phase or activity of the campaign. Participants include senior staff, key advisors, relevant consultants and sometimes the candidate.

Information Sharing Meetings – the purpose is to broadly share information that team members need to have in order to fulfill their responsibilities. These meetings should be brief and to the point and should include all team members. Examples include: daily staff meetings and nightly check out meetings.

Decision Making Meetings – the purpose is to evaluate options and make decisions. Examples include: scheduling meetings and budget meetings. Participants include campaign leaders and staff with responsibility for implementing decisions.

Coaching and Accountability Meetings—the purpose is to review progress to goals, address challenges and prepare to meet future goals. These may be one-to-one or small team meetings.

A lot of time is wasted in meetings where participants are confused about the purpose. If participants understand that the purpose of a particular meeting is to share information about decisions that have already been made, they are less likely to advocate for or debate an idea, something that is likely to frustrate both you and your staff.

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Model how to run good meetings and calls

Your staff and volunteer leaders will all be responsible for running meetings and calls to strategize about their own work, to coach others and to hold them accountable.

The way you run meetings will set the tone for the whole campaign. If you start and end late, it sends a signal that you don't respect others' time or campaign time. If you do all the talking, it suggests that others aren't needed, except to carry out your commands.

Have an agenda. Go over your agenda at the beginning of the call or meeting and be clear about the purpose of the call and its goals, as well as what decisions need to get made.

Set a time limit to the conversation and stick to it. Nominate a timekeeper to keep you and everyone else on time. Don't try to run a meeting and keep time at the same time.

Lead the discussion. For each section of the agenda, clearly state the question you are trying to get answered and keep the group on topic. Make sure to call on every member of the team to get their input. Keep the team focused—if the discussion gets off topic, it's your job to steer people back to the topic at hand. Ask questions to keep the discussion moving forward and clarify disagreements.

Be clear about action steps. Before ending the call, review what decisions were made and what action items people were assigned.

Don't allow "meetings after the meeting" where people have sidebar conversations to re-hash or undermine what took place in the meeting. If anyone has a gripe, the place to bring it up is in the meeting with everyone else. When necessary, have one-on-one discussions with your consultants about raising issues with the group as a whole and not individually, just as you would with staff.

Time is your greatest resource on the campaign. The way you use your time sets a model for the rest of the campaign. If you are efficient at work, if you run tight purposeful check-ins and conference calls, and if you hold yourself and others accountable to deadlines, then others will follow your lead.

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ADDRESSING PERFORMANCE PROBLEMS AND LETTING PEOPLE GO

Being a manager requires that you have respect for the work ***and*** respect for the people doing the work. No one likes to fail, and people rarely do poorly in their jobs without realizing that they are not meeting expectations.

Letting poor performance continue because you're afraid to address it, or "layering" a staff person with someone else shows lack of respect for the work that has to get done, and lack of respect for the person who is not meeting his responsibilities to the campaign.

We recommend the chapter on "Addressing Performance Problems and Letting People Go" in Jerry Hauser and Alison Green's book, *Managing to Change the World* for very detailed advice.

ADDRESS THE PROBLEM DIRECTLY AND IMMEDIATELY

When you become aware of a serious performance issue, do not put it off because you have more important things to do today. In a small campaign with a small staff, one person not performing well can be a significant drain on your campaign's human and financial resources.

Schedule a meeting immediately

Set up a face-to-face meeting with the person involved. Refrain from gossiping about the problem with other staff.

Be direct about the problem at hand

Be clear about exactly what the problem is. Be clear that this is an informal warning and be clear about exactly what needs to improve. The fact that there is a problem is non-negotiable. However, the path to solving the problem needs to be negotiated, with the staffer making clear choices and commitments.

Uncover the root of the problem

What is the root of the problem? Is this staffer getting the coaching and resources he needs? Is the root of the problem something that can be resolved easily with a slight shift in resources? Can the problem be fixed with re-training? Or do these staffer's skills not match the work he's being asked to do? Don't assume you know the cause of the problem without talking to your staffer.

Be serious about the work

Set very clear, measurable goals with clear deadlines and clear check-in points along the way. Be clear about the support and resources that will be offered this staffer to help meet these goals, but be clear what the consequences will be if they are not met.

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If performance continues to be a problem, give a written warning

Clearly lay out the problems and the timeline and specific steps it would take to rectify those problems. Meet with the staffer again to lay this out and to be clear that his job and the success of the campaign are at stake.

LETTING PEOPLE GO

Do it early

If you decide that you need to fire a staffer or volunteer, do it early and quickly. Having someone around who's consistently underperforming, or someone who is acting in ways inconsistent with the values of your campaign is demoralizing for other staff. Firing early (when firing is necessary) shows that you take the work seriously and the time of your other staff and volunteers seriously.

Have a third party in the room

This will be a very difficult conversation for you and for the staffer or volunteer involved. You need a third party there to help keep things civil and as a witness, but not as a negotiator. Once you've made the decision to let someone go, you need to stick to it.

Be respectful

It's critical that you respect the dignity of the person in front of you. There is never a reason to yell on a campaign, or to gossip about one staff person to another, and that holds in this situation too. The way you treat this staff person or volunteer gives a signal to the rest of the team about what type of leader you are.

Close the loop

Make sure the person being let go knows that this is a final decision. Close his email and phone account immediately, and shut down access to any campaign databases or servers. Be clear about what he should expect in terms of severance pay or continuation of benefits.

Interpret this for other staff

Do not use this as a way to threaten other staff or volunteers. Be clear that these decisions are not taken lightly. Be clear too that if other staff and volunteers meet work expectations and work in a way that is consistent with the values of your campaign that they have nothing to worry about. If you don't interpret what happened for others, then they will make up their own stories, which may quickly undermine your leadership, and will certainly distract others from the work they should be focused on.

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CONCLUSION

Learning to manage the work, the people and the clock is the real work of becoming a manager. Managers who are able to set and delegate clear goals, coach and hold people accountable to those goals, and use time effectively are managers who can build the organization and capacity necessary to win.

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SAMPLE WORK PLAN
Finance Director

Goals Big-picture, what are you trying to accomplish this month?	**Measures of Success** At the end of the month, how will you know whether you are successful in this area?	**Milestones** How will you know if you are on track along the way?	**Activities** Who will do what by when over the next 30 days?
1. Raise $125,000 from 250 donors 2. Recruit and train 5 new volunteer raisers who have goals of raising $10,000 each	1. By July 31 we have $125,000 more raised and 200 more donors than we do now 2. By July 31 at least 5 new raisers are trained and running their own fundraising events	• 5 volunteer raisers recruited and trained by July 7. • 10 fundraising events with 200 participants and $50,000 raised by July 20. • $25,000 raised online by July 31. • $25,000 raised through call time by July 31.	1. Finance Director does one-to-ones to recruit raisers by July 6 2. Finance Director trains raisers to build and lead house parties by July 7 3. Candidate does nightly call time (Finance assistant researches potential donors each day) 4. Finance assistant enters donor and event data.

*Based on Jerry Hauser and Alison Green, *Managing to Change the World*, p. 68.

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SAMPLE WEEKLY COACHING AGENDA

1:00 Check-in

Exchange stories from the last week since your last meeting. Talk about how you're each doing personally, and what factors outside the campaign are affecting your lives. Don't skip this time—understanding each other as human beings is important.

1:10 Evaluation of work plan and progress to goals

Re-articulate expectations and goals and why these goals matter. Check in on progress toward goals: Where have we come from? Where are we going?

Stay committed to meeting the goals and holding this staffer accountable to goals, which are non-negotiable.

1:20 Evaluation and problem solving

Debrief any meetings or activities since your last meeting. Let him or her go first. What worked? What needs to be improved next time? What did s/he learn? Include lots of "why" questions. Why did that go so well? Why did that not work?

Reinforce progress to goals, and specific growth in skills.

Use reflective listening: summarize and repeat what you've heard, reinforcing things that are important and acknowledging challenges.

Probe: Rather than telling your staffer or volunteer leader the answers, ask them what they think they can do, help them problem solve and learn to be resourceful.

Don't take the work back: leave responsibility for the work with your staffer, and figure out what support they need to fulfill their responsibilities.

1:40 Commitment to action

Go over upcoming activities and benchmarks. Discuss challenges that are anticipated, and strategize on how to address those. Summarize key learnings and next steps (prioritize 1-2 key action steps, not 10).

Recommit to your next meeting time and place next week.

Stay positive, acknowledge challenges, focus on solutions.

2:00 Close

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SAMPLE DAILY TEAM CHECK-IN AGENDA

9:00 AM **Personal Check-in/Updates**

Best stories from the day before. Ups and downs. (These stories give you a snapshot of what's going on in your campaign, and provide you with stories to share with the candidate as well as the media.)

9:05 AM **Review Yesterday's Outcomes**

Review progress on all major goals: fundraising, volunteer recruitment, voter contact and communications. Ask lots of questions—why did some organizers meet their goals and not others? Why did one email bring in $2000 and the other only bring in $500? Pay attention to the details! Debrief any major events.

9:10 AM **Today's Priorities**

Clearly outline today's priorities, as well as any major milestones or goals coming up in the near future. Give your team room to coordinate with each other here on how they will meet the day's priorities. What do they need from each other, the candidate or other staff? What do they need from you?

9:20 AM **Team Decision Making and Planning**

Bring key decisions to your team for input, and encourage them to bring their own major decisions to this team for input as well. Engage the team in planning the biggest campaign events with you.

9:30 AM **Close**

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CONCLUSION

Like any other skill, learning to manage requires practice, dedication, and more than anything a commitment to succeed.

The only way to learn is to keep trying, evaluating your failures and successes, and finding others to learn with. No matter what, do not lose sight of the goal and do not stop fighting to achieve it.

Becoming a manager means learning to balance the tension between the work and the people, respecting both so that the people are successful in getting the work done.

As you continue your learning as a manager, consider the words on the following page from Jerry Hauser and Alison Green, who describe the qualities of the best managers they've seen.

Now more than ever our country needs real progressive change that can improve our day to day lives—our schools and hospitals, our workplaces and environment, and above all else the cause of justice. Your leadership in electing progressive candidates to office is a critical part of that endeavor.

As you plow your own path forward, be in touch. We'd love to hear your campaign stories, and would welcome any advice or materials you'd like to share with other managers in future editions of this manual. Just email us at info@neworganizing.com.

Good luck!

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From Jerry Hauser and Alison Green, *Managing to Change the World*.

"Great managers *constantly worry about the real impact of their work, rather than appearances*. They have deep integrity about their missions, which leads them to pick goals and projects that will represent truly meaningful progress . . . .

When they run into roadblocks that might deter the average person, great managers *persist – and persist, and persist* – until they find a way past the obstacle.

Because great managers are determined to be successful, *they make hard decisions that may be unpopular* (such as abandoning a strategy that isn't producing results) *or personally painful* (such as letting go a loyal but lower-performing staff member).

While they may never be entirely comfortable having difficult conversations, great managers *put aside their personal discomfort* and have them anyway. They make themselves use words like, "I'd like you to do this differently," or "I'm concerned about something I've noticed recently," or even, "If this doesn't change, we will have to let you go."

Great managers are *almost ruthless when it comes to identifying ways the organization could perform better* (beginning with themselves), and they tend to display a *deep commitment to learning from experience and adapting their approach* to make it as effective as possible.

Because of this, they are *willing and even eager to take feedback and genuinely want to hear dissent*. They don't get defensive or shut out differing opinions; in fact, you may hear them thanking a staff member for sharing complaints or concerns – and they really mean it.

At their heart, all of these qualities come down to one thing, which is the same place where we started: that relentless, even obsessive, determination to get results."

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