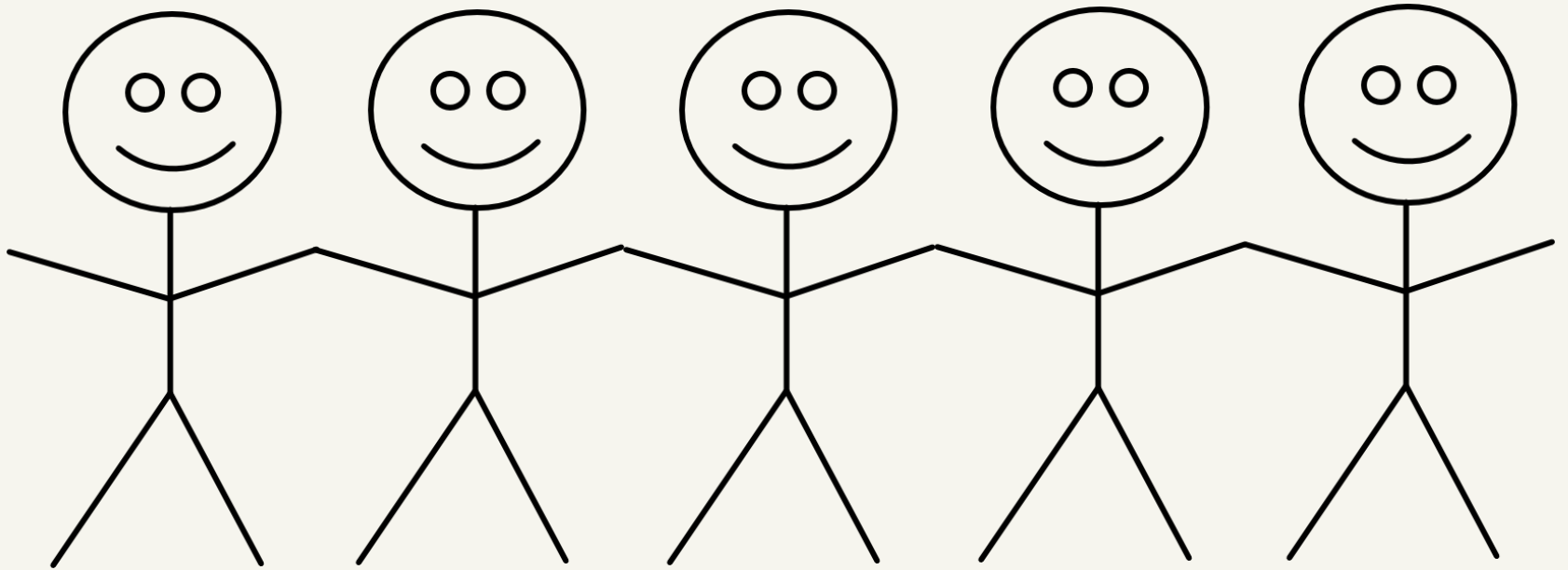




Campaign Boot Camp:
Field
November 6, 2019

FIELD: WHAT'S IT ALL ABOUT?



FIELD: WHAT IT'S ALL ABOUT!

- Make the campaign personal
- Organize people and communities
- Target voters with precision
- Make the electorate more manageable
- Set goals and accountability
- Measure success and adjust plan as needed
- Tailor targets and messages
- Make strategic decisions about use of resources
- Sway the electorate at least 3-5%

LAST BUT NOT LEAST ...

Feedback!

TODAY'S AGENDA

- Assessing Capacity
- Targeting
- Developing a Field Plan
- Exercise: Field Scenarios
- Organizing and Implementing Your Plan
- Discussion



PLAN PURPOSEFUL CONTACTS



START WITH KEY QUESTIONS

- Who are you talking to?
- What are you talking about?
- When are you contacting voters?
- Where are you making contacts?
- Why are you talking to these particular voters?
- How are you contacting these voters?



BUILDING YOUR FIELD PROGRAM

- Get and analyze your voter data (with VoteBuilder or PDI)
- Create your ID / GOTV universe(s)
- Develop a voter contact plan with budget and timeline
- Organize time for the candidate and volunteers to contact voters (door-to-door and by phone)
- Build voter-contact skills and capacity
- Logistics: Literature, phones, staging locations, script, training, volunteers and campaign leadership
- Enter your data, analyze, adjust as needed

FIELD LINGO

- Win number (a.k.a. vote goal): The number of votes you need to win or advance to the runoff
- Universe: Set of voters you plan to contact
- Scores: Data modeled to predict voter behavior
- VBM / PMV: Vote by mail / permanent mail voter
- Voter ID: Identifying a voter's level of support
- Persuasion: Contact to likely voters focused on winning new supporters to your campaign
- GOTV (Get Out the Vote): Contact focused on turning out occasional or unlikely voters who support (or likely support) your campaign

STEP 1

Assessing Capacity

*How much
can you do?*



TAKING STOCK

- **Money**

- What's your budget for voter contact?

- **People**

- Who can you recruit to help on a volunteer or paid basis?

- **Time**

- In the days remaining in the campaign, how many total personnel hours can be devoted to direct voter contact – including yours?

ESTIMATED KNOCKS AND DIALS

- Contact rate: In this example, 15 knocks per hour

| PEOPLE | HOURS / WEEK | # OF WEEKS | TOTAL HOURS | KNOCKS (15 / HR.) |
|-----------------|--------------|------------|-------------|-------------------|
| Candidate | 20 | 14 | 280 | 4,200 |
| Volunteers | 40 | 8 | 320 | 4,800 |
| Paid Canvassers | 30 | 2 | 60 | 900 |
| TOTAL | | | | 9,900 |

STEP 2

Targeting

*Who are you
contacting?*



APPROACHES TO TARGETING

- In a race with strong partisan dynamics, few resources need to be spent on base Dems who always vote, or any at all on partisan Republicans
- Likely supporters who never vote are a lower priority (depends on capacity and resources)
- The Democratic base is rarely enough to win an election, so we also need frequent-voting persuadables, occasional-voting likely supporters, and newly registered likely supporters
- Campaigns using VoteBuilder should apply predictive scores to target for turnout and persuasion

THE TARGETING MATRIX



Likely Support Level

Likelihood to Vote

| | OPPOSED | UNKNOWN / UNDECIDED | SUPPORTIVE |
|------------|------------------------------|---------------------------------|-------------------------------|
| FREQUENT | Opponents who always vote | Persuadables who always vote | Supporters who always vote |
| SOMETIMES | Opponents who sometimes vote | Persuadables who sometimes vote | Supporters who sometimes vote |
| SELDOM | Opponents who never vote | Persuadables who rarely vote | Supporters who rarely vote |
| NEW VOTERS | Newly registered opponents | Newly registered persuadables | Newly registered supporters |

TURNOUT: THE KEY VARIABLE

- Gubernatorial vs. Presidential
- Primary vs. General Election
- Top of ticket races vs. downballot
- Competitiveness of a race
- Party
- Demographics
- District / location
- Mood of the electorate



PEOPLE ≠ VOTERS

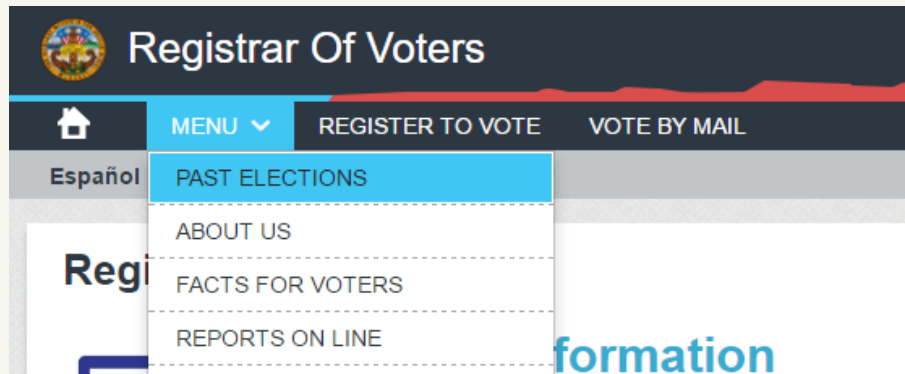
(Example: City of Imperial Beach)

- Population: 27,418
- Registered voters: 13,390
- Turnout last November: 6,723



RESEARCHING TURNOUT HISTORY

- For each of the last three presidential elections, look up the voter turnout in your race
- View past results on the Registrar of Voters (ROV) website: www.sdvote.com



CALCULATING YOUR WIN NUMBER

Registered voters now
x Average of past turnout % in 3 similar elections
= Projected Turnout
(# of voters)

Projected turnout
x 55% (built-in cushion)
= Your Win Number



Your win number is your North Star

WIN NUMBER EXAMPLE

100,000 registered voters
x Average past turnout 58%
= 55,000 votes

x 55% (two-way race)
= **30,250**

*Special cases:
New subdistricts,
top-two primaries,
races with 3+ candidates*

WHAT'S YOUR VOTE DEFICIT?

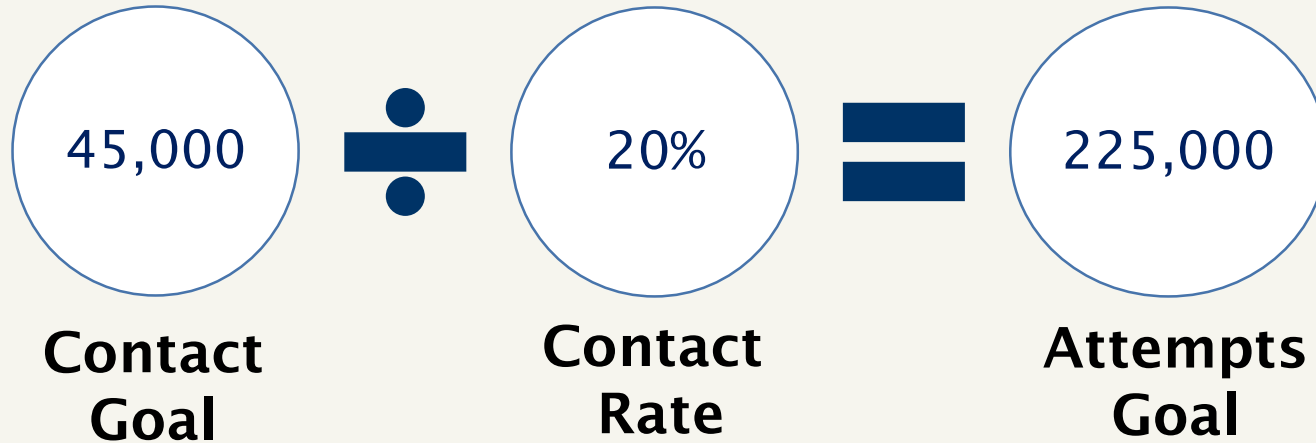
- Win number: **~30,000**
- Likely minimum vote share for a Dem. candidate (*example*): **45%**
- Base vote (45% of likely turnout of 55,000): **24,750**
- Vote deficit (win number minus base vote): **5,250**

SETTING A CONTACT GOAL

- Within persuasion/turnout universes, apply judgments about persuasion rate (60%?) and GOTV impact (5%?) to reach a contact goal for a vote deficit of ~5,000:
 - Persuasion goal $3,000 \div 40\% = 5,000$
 - GOTV impact goal $2,000 \div 5\% = 40,000$
 - Contact goal = **45,000**

CONTACT RATES

- A realistic baseline for contact rates:
 - Phones – 10-20%
 - Canvass – 25-35%



OTHER WAYS TO TARGET



OTHER WAYS TO TARGET

- Gender
- Age
- Neighborhoods
- Precinct walkability
- VBM status
- Early vote timing
- Demographics
- Household composition
- Issues
- Campaign IDs

STEP 3

Developing a Field Plan

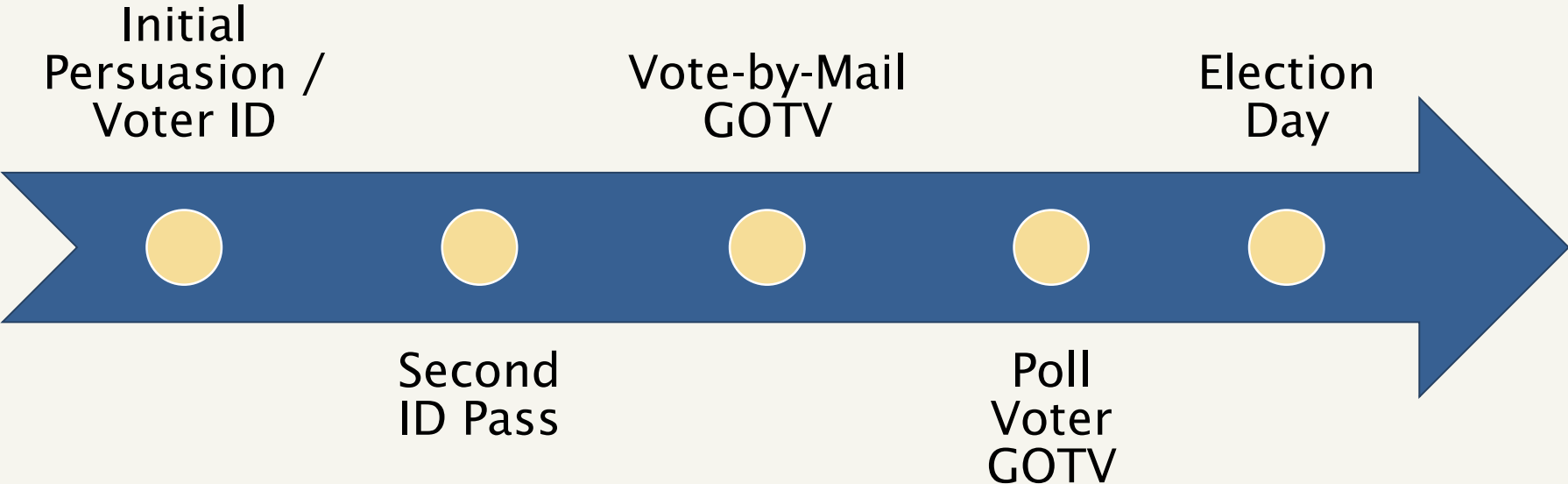
*How will you
reach your goals?*



REMINDER: VOTER CONTACT MODES

- **Persuasion:** Contacts based on gaining (and keeping) supporters
- **Voter ID:** The process of identifying a specific voter's level of support
- **Get-Out-The-Vote (GOTV):** Contacts focused on turning out occasional or unlikely voters who support (or likely support your campaign)

FIELD TIMELINE



VOTER ID / PERSUASION PHASE

- Make the ask: *Can I count on your vote for City Council?*
- Record the response and enter the data:
 - Yes (may need GOTV later)
 - Undecided (may merit further persuasion)
 - No (move on!)
- Second/third passes of ID contacts can be made:
 - Confirm that Yes IDs are holding steady
 - Try to reach people who weren't home before

CREATING A SCRIPT

- Scripts are used to guide conversations with voters (or volunteers) at doors, on the phone, or through text
- Structure is important, but also make a connection
- Have clear, strong asks
 - Open-ended vs. directed questions
 - Let the voter's responses guide follow up questions, especially with undecided voters
- Do: Introduce yourself, identify voter, repeat candidate's name and election date
- Don't: Give opponents name recognition, improvise on issues, use the wrong script for each phase, forget to make the ask

SAMPLE SCRIPT

Hi there! I'm **[your name]** and I'm with Hoosier Action and the Indiana Working Families Party. We're out tonight talking with folks about Liz Watson. Is **[voter name]** available?

[If the person on the list you're looking for isn't home, end conversation and move on to next door].

[if you reach the person on the list] Great! As I'm sure you know, there's an election coming up on November 6th. We're talking to neighbors about Liz Watson, who's running for Congress. Have you heard of Liz?

[yes or no] Great! So you know that Liz is a 5th-generation Hoosier who has a proven track record of fighting for working families. She will stand up to special interests and will push for policies that will actually help folks here in southern Indiana.

In Congress Liz is going to fight to expand access to health care, protect Medicare and Social Security, find real solutions to the opioid crisis, and create better jobs. **Which one of these is most important to you? (include talking points esp. For volunteers)**

[if they answer yes/probably yes]

Can Liz count on your support? >>IF YES (STRONG SUPPORT) We would love to have you volunteer for the campaign. Could we get your contact information to let you know of opportunities?

[Afterward, mark the voter as a volunteer in MiniVAN!]

[if undecided on supporting Liz (3)]

Go into additional talking point of your choosing.

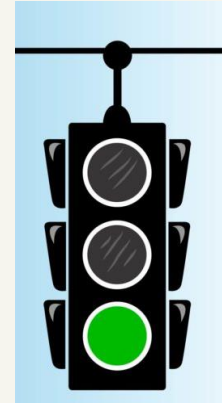
That all sounds good, right? Great, can Liz count on your support?

[if still undecided (3) or lean opponent (4)/strong opponent (5)]

Thank you for your time and have a great day.

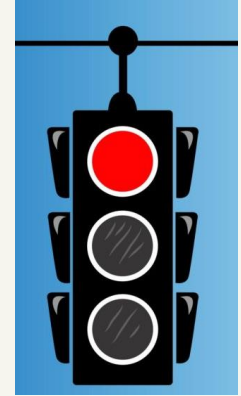
GOTV PHASE

- Know early voting / ballot dropoff locations
- Incorporate polling place locations
- Ballot collection
- *New*: Same-day registration at polling places
- Use a script based on well-established effective practices:
 - Social pressure (*lots of people are voting!*)
 - Connection with volunteers who are local
 - Vote planning (when, where, how?)
 - Accountability (*turnout is a public record*)



CONTACT PRACTICES TO AVOID

- Non-targeted contacts
 - Campaigning at markets, etc.
- Efforts that don't change minds
 - Sign-waving, robocalls, emails
- Spending time on “No” voters



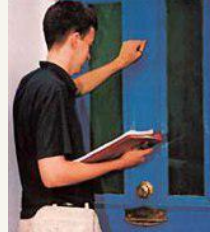
CONTACT METHODS

For Persuasion / ID

**Volunteer
phones**



**Door-to-
door**



**Direct
mail**



Digital



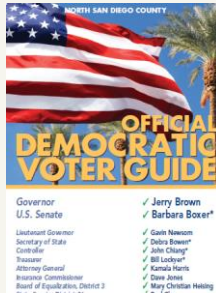
**Paid
calls**



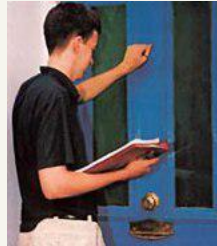
CONTACT METHODS

For GOTV

Doorhangers



Door-to-door



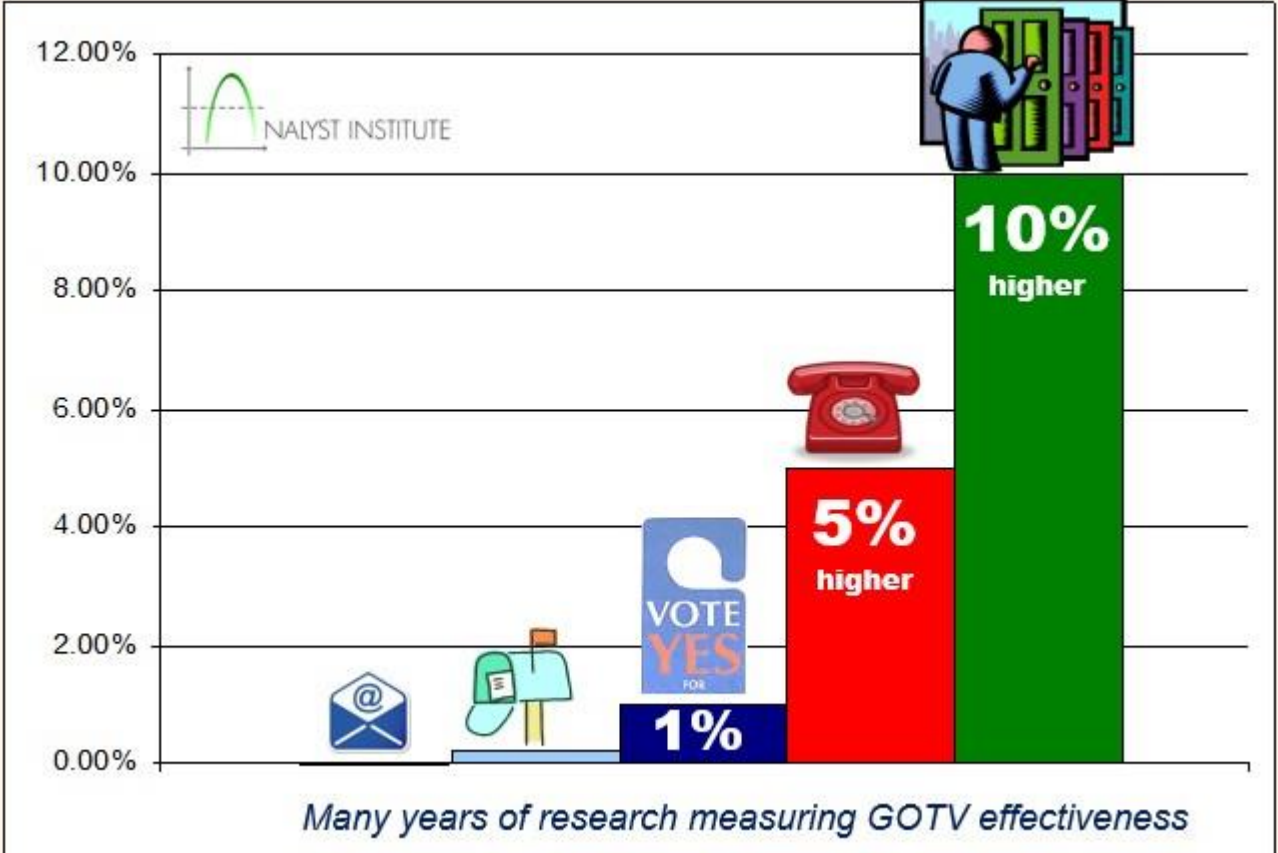
Volunteer phones



Text Messaging



RESEARCH SHOWS WHAT WORKS



STRENGTHS/WEAKNESSES

Door to Door

- Most effective form of voter contact
- Can be low cost / volunteer-based
- Time-intensive

Phones

- Can be targeted for specific programs
- Cheap / easy
- Less effective than door-to-door
- Lots of people with no number in the voter file

Paid Voter Contact

- Never as effective as trained, local volunteers
- Costly
- Better for ID than persuasion

STRENGTHS/WEAKNESSES CONT'D

Direct mail

- Highly targeted, huge reach
- Can be compelling, credentialed
- Has a physical presence in voters' homes
- Expensive, negligible GOTV effect



Digital

- Can be highly targeted
- Relatively cheap additional layer of communication
- Improving rapidly
- Video production pricing can range

Yard signs, billboards, print

- Less targeted, less effective

DIGITAL ORGANIZING TOOLS



MORE FIELD IDEAS

- Ranking your canvassing target density by precinct will prepare you with tiers of options
- Phone lists can also be prioritized and used to fill gaps in your contact program
- Multi-method outreach is very effective
 - Coffee program with door-knock, neighborhood event, and follow-up note
 - Mail followed up with knock / call
 - Having the candidate call likely voters previously ID'd as undecided

BACK TO YOUR GOALS ...

- Calculate / estimate contact capacity
 - 20 knocks per hour (example)
 - 3 hours per canvassing shift (example)
 - 60 attempts per shift
 - 1,200 shifts to reach 72,000 attempts
 - Average of 60 shifts per week for 20 weeks to reach 1,200 shifts:
 - 8 weekly shifts by candidate
 - 32 shifts by field staff
 - 20 shifts by volunteers



SMALL-GROUP EXERCISE

Field Scenarios

STEP 4

Organizing and Implementing

Where the rubber meets the road



VOLUNTEERS



WHERE TO RECRUIT?

- Dem Clubs
- Marches/rallies
- Meet and Greets
- Neighborhood meetings
- Use social media to your advantage!
- Campuses
- Anywhere and everywhere!



HOW TO RECRUIT?

- Be prepared
- Establish credibility – share your personal story for why you got involved
- Listen to their story/priorities
- Give reasons for involvement
- Get a specific commitment
- Follow up
- Always have your clipboard



VOLUNTEER RETENTION TIPS

- Consistency is key-have set shift days/times
- Set realistic goals, and try to surpass them
 - Start small and build up!
- Talk to your volunteers and get to know them
- Check in with them after their shift
- Set them up for success – pair them with someone experienced
- Make it fun!
- Be organized and mindful of their time



VOLUNTEER RECRUITMENT CALLS

Key to recruiting / retaining volunteers

- Ask for a specific commitment
- Sense of urgency – why this weekend?
- If they say no, have an alternative day/shift
- Keep track of shifts to follow up
- Take notes on each vol and tailor your conversations
- Leave messages, send texts, keep calling



LAUNCHING A WALK

- Everyone must sign in!
- Figure out the flow beforehand, assign experienced vols as helpers
- **Make sure all packets get signed out and are accounted for**
- Be mindful of where you are sending which canvassers to make sure they have the most positive experience
- Get people out walking as soon as possible
- Be thorough in training
- Thank them, and thank them again
- Reschedule them



TRAINING

- Make sure they understand why each ask on the script is important in the overall strategy
- Wait until the end to answer questions and individual concerns; you'll answer most during your training and it takes time to stop and answer in the middle
- Make sure they understand the coding/walk sheets
- Splitting up is much more effective; encourage that
- Make sure canvassing pairs have each others' contact info
- Pep talk to encourage them to finish their packet
- Thank them!



OTHER TIPS

- Make it fun!
- Make sure volunteers feel valued
- Feed them!
- Reschedule vols
- Shoutouts to vols online; take and share photos
- There's something for everyone to do; be creative in assigning vols who won't walk (yet)



OTHER TIPS (CONT.)

- Host a meeting to get volunteers involved to allow them get to know more about the campaign/strategic goals, and sign people up for shifts
- Capacity-building
- Host a volunteer training/bootcamp
- Use social media
- Work with other progressive/Dem groups to get volunteers in the door



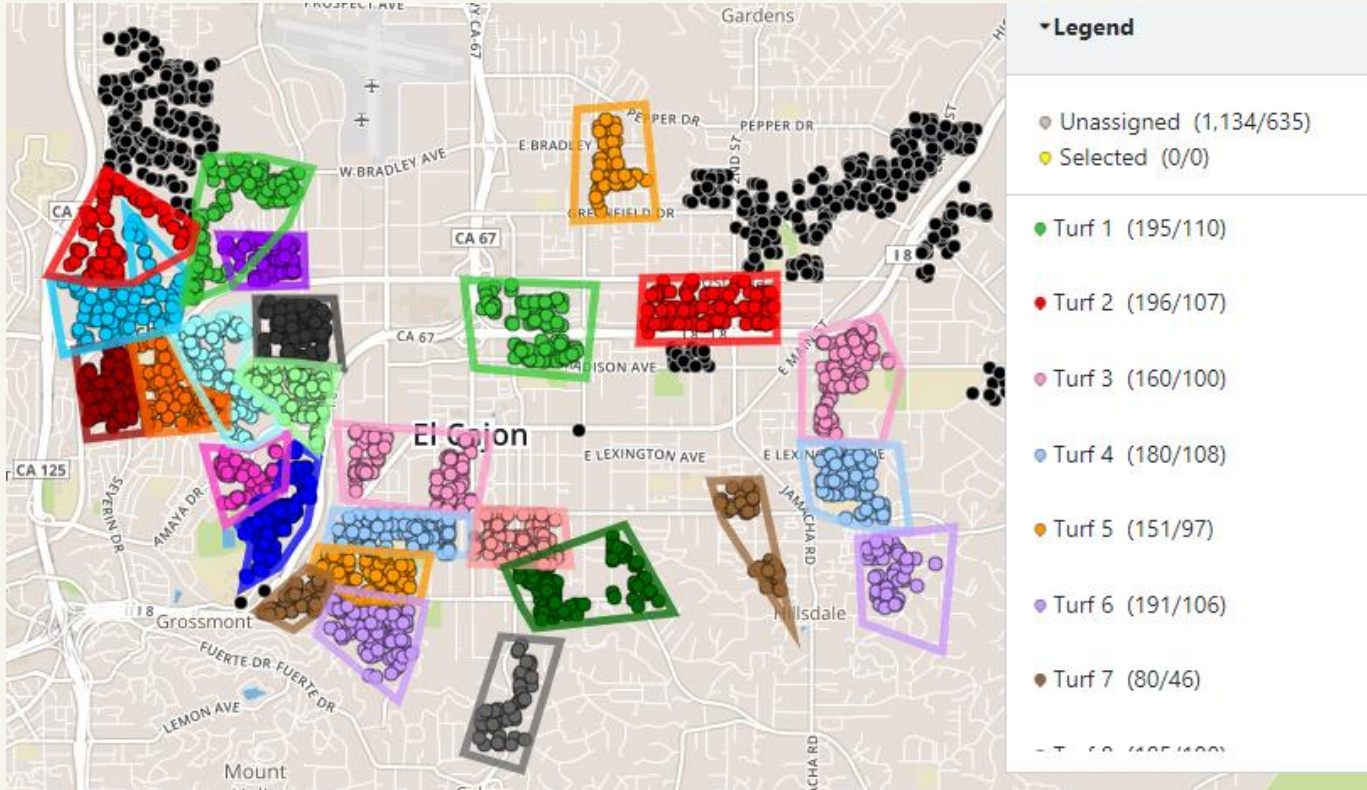
TRACK YOUR PROGRESS

- Tracking field results is essential
 - Keeps you on track to hit goals
 - Shows if you need to adjust shift goals, daily/ weekly goals
 - Keeps campaign organized
- Tracking methods
 - Spreadsheets
 - Databases
- Update data nightly!
 - Collect tallies from canvassers and volunteers; confirm accuracy
- Volunteer recruitment tracking
- Don't fall behind!

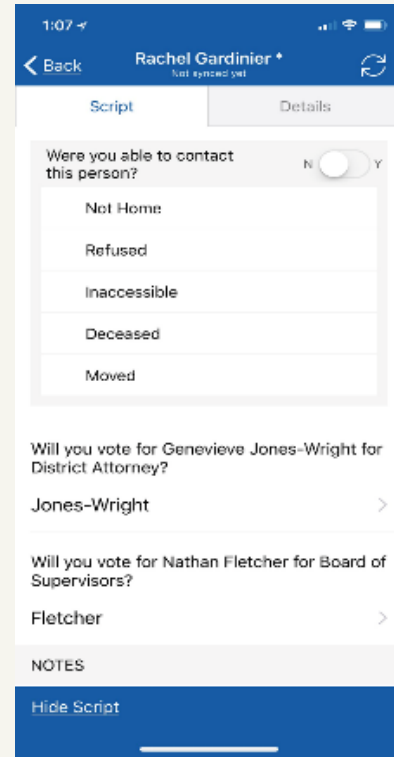
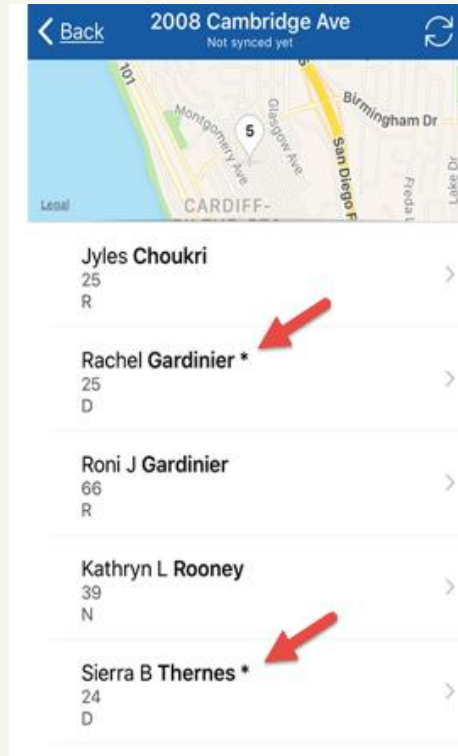
SAMPLE TRACKER

| | Matt Positive ID Goal | Matt Positive ID Actual | Matt Positive ID Difference | Vol Positive ID Goal | Vol Positive ID Actual | Vol Positive ID Difference | Paid Field Positive ID Goal | Paid Field Positive ID Actual | Paid Field Positive ID Difference |
|----------------------------|-----------------------|-------------------------|-----------------------------|----------------------|------------------------|----------------------------|-----------------------------|-------------------------------|-----------------------------------|
| Week 1: 6/18 | 91 | 54 | -37 | 104 | 39 | -65 | 0 | | 0 |
| Week 2: 6/25 | 91 | 70 | -21 | 144 | 98 | -46 | 0 | | 0 |
| Week 3: 7/2 | 91 | 56 | -35 | 72 | 111 | 39 | 235 | 242 | 7 |
| Week 4: 7/9 | 91 | 76 | -15 | 140 | 124 | -16 | 292 | 405 | 113 |
| Week 5: 7/16 | 97 | 63 | -34 | 140 | 181 | 41 | 350 | 342 | -8 |
| Week 6: 7/23 | 105 | 91 | -14 | 140 | 177 | 37 | 350 | 232 | -118 |
| Week 7: 7/30 | 105 | 59 | -46 | 140 | 167 | 27 | 525 | 355 | -170 |
| Week 8: 8/6 | 75 | 30 | -45 | 100 | 27 | -73 | 375 | 33 | -342 |
| Totals | 746 | 499 | -247 | 980 | 924 | -56 | 2,127 | 1,609 | -518 |
| Total Before Stephen | 277 | | | | | | | | |
| Positive IDs Goal | 4,130 | | | | | | | | |
| Positive IDs Needed | 821 | | | | | | | | |
| Total Postive IDs | 3,309 | | | | | | | | |
| Total (since | 3,183 | | | | | | | | |

CUTTING TURF



MOBILE CANVASSING



IN CONCLUSION

- **Stay focused:** Your ultimate goal in a campaign is to get enough votes to win, so recognize and resist distractions,
- **Align resources:** Your use of time and money should be driven by your plan to reach your goal



DISCUSSION

