



Campaign Boot Camp:
PLANNING AND ORGANIZATION
October 30, 2019

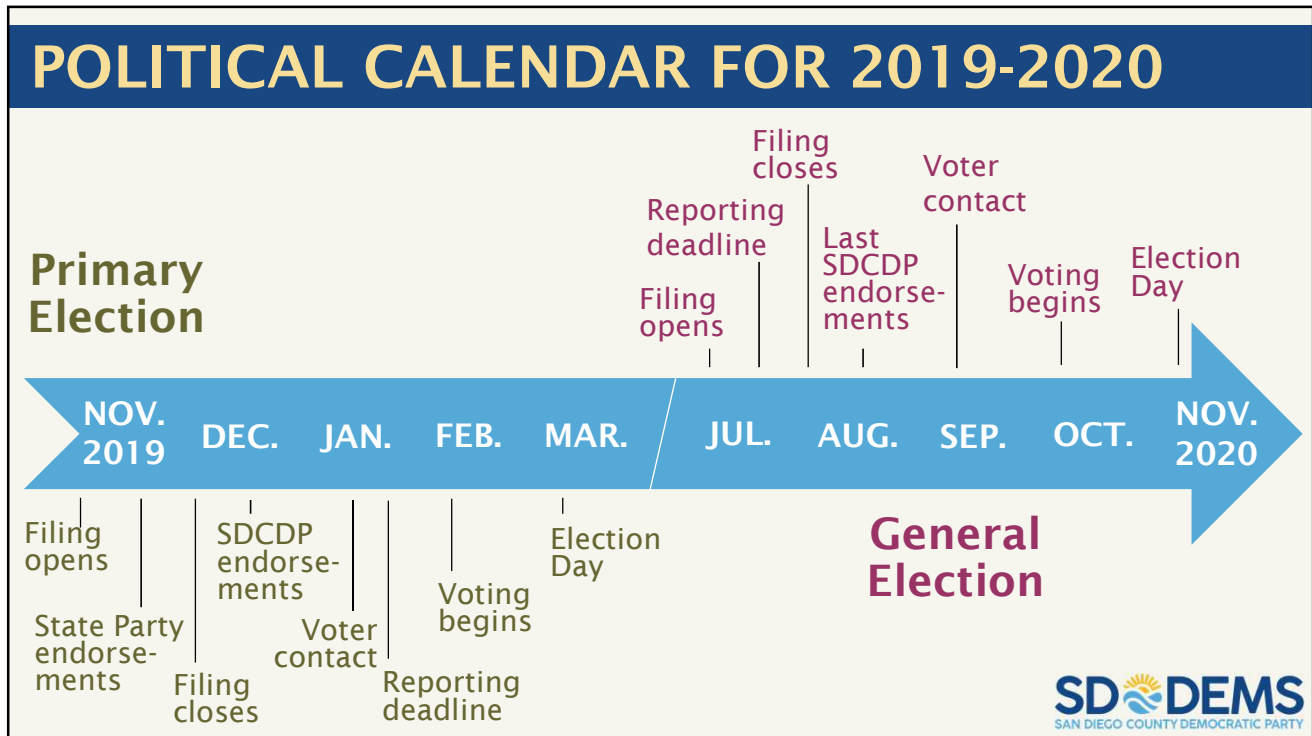
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TODAY'S AGENDA

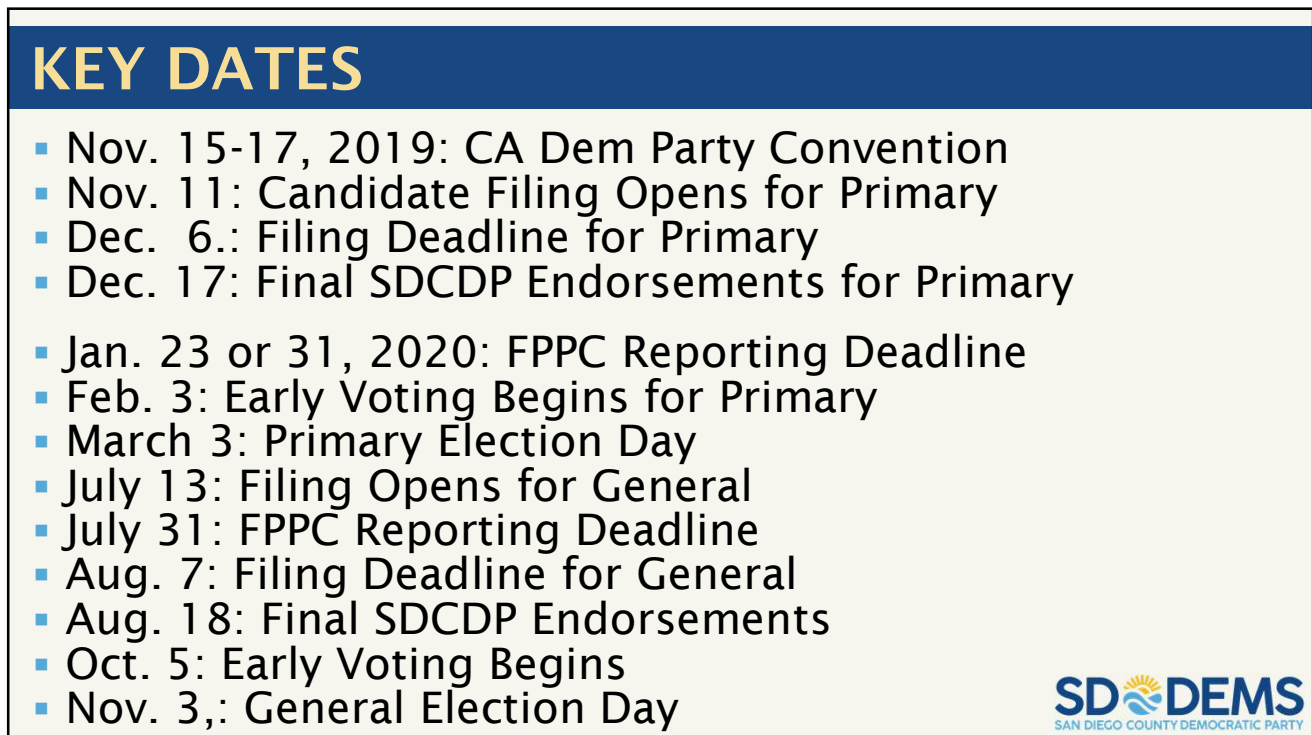
- Political Calendar Overview
- Elements of a Campaign:
 - Finance
 - Field
 - Communications
 - Operations
- Writing a Campaign Plan
- Timeline Activity



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OVERVIEW: "CAMPAIGN 101"

A Venn diagram with four overlapping circles. The top-left circle is purple and labeled 'Finance' with a stack of money icon. The top-right circle is blue and labeled 'Comms' with a megaphone icon. The bottom circle is brown and labeled 'Field' with a hand pointing icon. The central intersection of all four circles is red and labeled 'Operations' with a calendar icon.

SD DEMS
SAN DIEGO COUNTY DEMOCRATIC PARTY

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1) FINANCE

You will never have enough money.

A computer mouse is shown in the foreground, resting on a background of scattered US dollar bills.

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5 QUESTIONS OF FINANCE

- How much do we need?
- Where will we get it?
- How much can they give?
- How will we ask?
- How will we accept?



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GROUND RULES FOR BUDGETING

- Start from Election Day and work backward
- Voter communication comes first
- Break it down monthly
- Cut revenue estimates by 15% and increase expenditures by 15%
- Voter contact comes first – 65% of budget or more
- Add on 10% of your total for contingencies



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SAMPLE BUDGET

VOTER CONTACT	July	Aug.	Sept.	Oct.	Nov.	TOTAL
Direct mail				\$1,000	\$1,000	\$2,000
Doorhangers / lit		\$1,000				\$1,000
Lawn signs			\$900			\$900
Voter data		\$300				\$300
Website / email	\$50	50	\$50	\$50	\$50	\$250
Outreach / other	\$150	\$150	\$150	\$100		\$550
						<u>\$5,000</u>
ADMINISTRATIVE						
Manager / assistant		\$500	\$500	\$500		
Fundraising	\$250	\$250	\$250	\$250		\$1,000
Treasurer / filing	\$150	\$150	\$150	\$150	\$150	\$750
Cell phones			\$150	\$150		\$300
Equipment / supplies		\$50	\$100	\$100	\$50	\$300
Volunteer food		\$50	\$150	\$200	\$100	\$500
Other admin	\$100	\$150	\$150	\$150	\$100	\$650
						<u>\$5,000</u>
TOTAL	\$1,000	\$2,350	\$2,550	\$2,650	\$1,450	\$10,000

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FUNDING FUELS THE CAMPAIGN

- To succeed, your campaign needs a solid plan for fundraising and financial management
- As the candidate, you're the most important asset in the campaign and the primary fundraiser (though it may be your least favorite thing to do)
- Fundraising requires confidence, skill, discipline, and hard work
- Asking for a contribution gives supporters a way to invest in your and your campaign

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BUILD A DATABASE

- Start with an Excel sheet
- Input first and last name, occupation/employer, home number, work number, cell number, email, gender, affiliations, amount for ask, votes about how the candidate knows them, other relevant info
- Love money
- Every person the candidate has ever met in their lives
- Business cards
- Historical donors
- Fundraising database vendors



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VENDORS FOR FINANCE

- Compliance: NGP, ISP, NetFile, DirectFile, Aristotle
- Database: NGP, ISP, Netfile, Aristotle, NationBuilder
- Mass email: NGP, NationBuilder, Mailchimp, Constant Contact, Action Network
- Credit card processing: ActBlue, NGP, Democracy Engine, Square, Paypal
- Treasurers



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2) FIELD

Direct voter contact wins elections.



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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



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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?



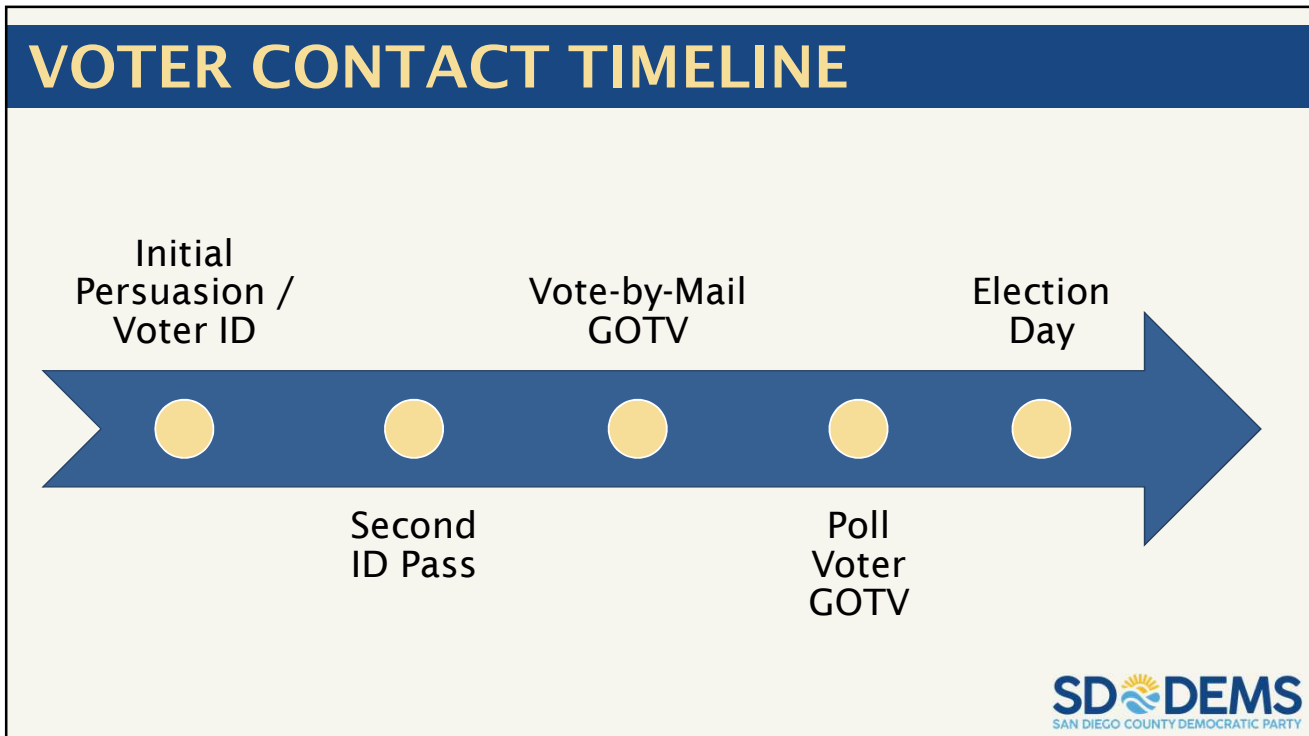
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CONTACT METHODS

- Door-to-door canvassing
- Phonebanking
- Direct mail
- Texting
- Paid digital



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ORGANIZE YOUR FIELD PROGRAM

- Get voter data for your race (VoteBuilder or PDI)
- Define your ID / GOTV universe(s)
- Develop a voter contact plan and timeline
- If planning digital and direct mail, factor that into timing
- Make time for the candidate and volunteers to contact voters
- Build voter-contact skills and capacity
- Logistics: Literature, phones, staging locations, script, training, volunteers and campaign leadership
- Enter your data, analyze, adjust as needed

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3) COMMUNICATIONS

Messaging, branding, and methods of communication.



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MESSAGING

- A limited body of truthful information designed to motivate voters to choose your candidate
- Not a hashtag, slogan or 10-point plan
- Why does it matter?
- Why should I care?
- Why should I trust you to fix it?



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YOUR CAMPAIGN'S BRAND

- Consistent colors
- Logo that reinforces your message
- Photos that present your candidate in the best light
- Slogan that reflects your message
- Reinforce your message every chance you get



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COMMUNICATIONS METHODS

- Literature: Campaign flyers, walk pieces
- Mailers: Campaign mail and commercial slate mail
- Speeches and interviews
- Broadcast radio and TV (earned and paid media)
- Digital (organic or paid)
- Ballot designation and candidate statement



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VENDORS FOR COMMUNICATIONS

- Mass email: NationBuilder, Mailchimp, NGP
- Social media management: Hootsuite, Twit Doc, Bitly
- Website hosting: NationBuilder, Campaign Partner, WordPress, Wix, NGP



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4) OPERATIONS

Logistics and people power.



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THE LOGISTICS OF TEAM-BUILDING

- What positions do you need filled by when?
 - Campaign manager
 - Treasurer
 - Field director
 - Finance director
 - Volunteer coordinator
 - Field organizer
 - Canvasser
 - Other misc. positions

Start on Election Day and work backward to figure out your timeline.



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TEAM-BUILDING LOGISTICS (CONT.)

- Contracts
- Holidays / holy days / time off
- Celebrations and emergencies
- Standard days off every week
- Payroll (campaign or treasurer or consulting firm?)
- Taxes
- Sick leave: 3 days minimum (5 days in the City of S.D.)
- Workers' Comp
- Healthcare
- Mileage (reimbursement 58 cents/mile)



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EMPLOYMENT RIGHTS ON CAMPAIGNS

- Classification
 - Independent contractors vs. employees
- Wages and Hours
 - Overtime, sick leave, rest breaks, meal breaks, etc.
- Harassment Prevention
 - Discrimination, sexual harassment, bullying, etc.
 - Volunteers and interns are also protected
- Campaign Workers Guild - Fair Campaign Pledge
 - Many Democratic campaigns have signed on



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AVOIDING WORKPLACE HARASSMENT

- Vet your leadership. Ask around. We all talk.
- Hire diversity
- Code of Conduct / Employee Handbook
- Training
- Set up a system for filing complaints
- Allow respectful / professional dissent
- **Make sure your teams know harassment isn't just physical**
 - Verbal or written comments, threats, stalking, intimidation, phone calls, emails, recording or photography, or sustained disruption of campaign business



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AVOIDING HARASSMENT (CONT.)

- At Fundraisers
 - Limit alcohol intake (and prevent underage drinking)
 - Place the check-in table within view of the event
 - In going to set up, try your best to send two people
- In the Field
 - NO ONE goes in ANY voter's house for ANY reason
 - Make sure the entire field team is connected
 - Use apps when possible for geotagging
 - Send volunteers and interns in pairs



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AVOIDING HARASSMENT (CONT.)

- In the Office
 - Keep your team informed and have an open-door policy
 - Don't physically close your office door
 - Make sure people get their breaks and stay rested and fed
- On the Internet
 - Set up team standards for conduct online



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CAMPAIGN CULTURE

The candidate sets the tone.

Management enforces it.

*Your campaign is responsible for
the behavior of your team in all settings.*



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SET BOUNDARIES

- **Respect days off.**
- When people are sick, let them heal.
- With a family emergency, be supportive and flexible.
- **If someone is uncomfortable, don't force them into a situation.**
- Set and stick to expectations for work turn-around
- Take commute time into consideration.
- Understand that candidates probably do not fully understand their staffers' jobs – so look for deliverables, not face time.
- **Pay people for their work.**



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IN CONCLUSION ...

You're a Democrat. Live and work your values.

*Your campaign is not a hill for martyrs to die on.
It's a temporary workplace. A long-term group project.
It will end on Election Day one way or the other.
Don't ruin your life (or someone else's, or expect
others to do so) to feed the campaign.*



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WRITING A CAMPAIGN PLAN



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ELEMENTS OF A CAMPAIGN PLAN

- Electoral Landscape
- Finance Plan
- Campaign Roles and Responsibilities
- Messaging
- Community Outreach
- Targeting / Field / Voter Contact
- Volunteers
- Endorsements
- Timeline



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ELECTORAL LANDSCAPE

- What are the key local and national issues?
- What's the mood of the electorate
- Who is your opposition?
- What are the voter registration, demographics, and political profile of this district?
- What else is on the ballot?



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FINANCE PLAN

- Historical donor information that may be applicable
- Endorsers and supporters with large networks
- Event ideas
- Digital: Email, Facebook
- Direct mail
- Call time expectations
- Monthly goals that can be broken down weekly if necessary



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MESSAGING

- Pro-candidate and anti-opposition
 - Issue-based
 - Values-based
 - Personal story



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ROLES & RESPONSIBILITIES

- What positions do you need filled?
- What is each position responsible for?
- What is your hierarchy?
- Paid staff vs. volunteer staff



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OUTREACH

- How will you engage your community?
 - Important groups / leaders in your district
 - Strategies to get your candidate in front of them
 - Plan your “asks” for them once they decide to support



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VOTER CONTACT

- How many voters are in your district?
- When and how (polls vs. mail) do people vote?
- What's your win number?
- Phases of voter communication
- Types of voter communication



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VOLUNTEERS: A CAMPAIGNS BACKBONE

- Identify volunteer leadership positions
- How many volunteer shifts do you need to reach your win number?
- Strategies for recruitment
- Strategies for maintaining motivation



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ENDORSEMENTS

- A signal to voters and donors
 - What endorsements make sense for your candidate to pursue?
 - Ideological, positional, elected officials, community leaders
 - Local, state, national
 - Given: if you are a Democrat, you want labor ... but you need understand their priorities and earn their support
 - Be creative: who has influence in your specific district that may not have been involved in past races?



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TIMELINE: WHEN DOES IT ALL HAPPEN?

- Keeps the campaign from being reactive
- List major holiday and community events / awareness months
- Campaign deadlines
- Communications calendar: press events, releases, issue pushes
- Finance calendar: Deadlines, events
- Voter ID calendar: How many IDs by when
- Work backward from Election Day



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SET SPECIFIC GOALS

	<u>PHASE 1:</u> Building the Foundation	<u>PHASE 2:</u> Engaging Supporters	<u>PHASE 3:</u> Engaging Voters	<u>PHASE 4:</u> Winning
MONEY RAISED	\$1,000	\$3,000	\$7,500	\$10,000
VOTER IDs	250	1,000	1,300	1,500
VOLUNTEERS	2	8	10	12
ONLINE SIGNUPS	100	500	750	1,000

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TIMELINE ACTIVITY



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TRAINER CONTACTS

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