



The Small Business Guide to Running for Office

A HOW TO MANUAL

“If you run a business, you need to get involved in politics or politics will run your business.”

Dear Small Business Owner:

Every day you walk into your business, you face a litany of rules, regulations, and laws determined by local, state, and federal officials. Politics—and government—have more than an interest in your business. Their decisions, no matter how big or small, affect your bottom line.

Your decision to consider running for office carries significance. There are 513,000 elected officials in the United States—an astounding number of individuals who govern our lives and your business.

That’s why we’ve created **“The Small Business Guide to Running for Office”** to help you better prepare for your candidacy. NFIB is proud to be the voice of small business in Washington, D.C. and in state capitals across the nation. Now, we want to be a resource for small business owners who consider running for office.

In many ways, running a campaign is like running a business: You create a strategy and plan, establish a budget, raise the money, and target your audience. And now, voters are your customers.

The following chapters explain the best practices as well as provide examples to help you be a successful candidate for elective office. There is so much at stake and the only way to have good small business policies is to elect good small business candidates!

Thank you again for considering this next step in serving your community and country. I hope you find this guide helpful and wish you the best of luck in your campaign!

Sincerely,



Brad Close
NFIB President & CEO

Chapter One: (pg. 5 - 76)

**The Campaign Foundation:
Running a Campaign is a Business**

- Campaign Overview and Planning
- Campaign Structure
- Candidate Scheduling
- The Campaign Headquarters
- Recruiting Volunteers
- Targeting
- Opposition and Issue Research
- Appendix: Excel Formulas for Targeting

Chapter Two: (pg. 77 - 122)

Voter Contact

- Lists, Databases and Software
- Organizing the Precincts
- Voter Canvassing
 - Telephone Canvassing
 - Door-to-Door Canvassing
- Voter Registration
- Early Voting & Absentee Ballot Program
- Get-Out-The-Vote (GOTV)

Chapter Three: (pg. 124 - 176)

Fundraising

- Guidelines for Successful Fundraising
- Finance Chair and Finance Committee
- Personal Solicitation
- Developing a Finance Plan
- Political Action Committees
- Events
- Direct Mail Fundraising
- Telemarketing
- Digital Fundraising
- Appendix A: 2017-2018
 - FEC Contribution Limits
- Appendix B: Sample Campaign Income Worksheet

Chapter Four: (pg. 178 - 244)

Communications

- Paid Media
 - Radio Advertising
 - Newspaper Advertising
 - Television Advertising
 - Cable Television
- Graphics
- Direct Mail
 - Targeting
 - Copywriting
 - Design and Artwork
- Digital Media
 - Website
 - Social Media
 - Blogs
 - Podcasting
- Earned Media
 - Communications Basics
 - Five Elements of Political Communication
 - Dealing with Reporters
 - Developing Media Lists
 - Writing News Releases
 - Sample Press Release
 - News Conferences
- Public Speaking and Presentations

Chapter Five: (pg. 246 - 250)

You as the Candidate

- Building the Foundation
- Preparing Yourself for a Run for Office
- Tips for the Spouse of the Candidate

Chapter One

Campaign Planning and Overview

Introduction

In this section we'll look at campaign planning for local campaigns: why you should have a plan and what it should include.

You may have heard people talk as though campaign strategy and campaign planning depend on a secret formula. The process is usually straightforward. With knowledge of the local community and some experience in politics, anyone can write a successful campaign plan.

In this section we will first talk about why you should have a campaign plan, and then go through the steps of writing one.

A Description of the Purpose of Planning

It goes without saying that the goal of a political campaign is to win the election. Your campaign plan is the method you will use to reach this goal.

There are six reasons why you should have a written plan.

Reason one: People expect it. Many contributors and some party committees won't help anyone who doesn't have a written plan. They figure that if you don't have a plan, you don't know what you are doing, which makes you a bad investment.

Reason two: You will make better use of your resources if you have a plan for using them. Every campaign has limited resources. Even with a plan, you will still waste many resources. Without a plan, you are likely to waste them all.

When Susan Bryant was Political Director of the National Republican Senatorial Committee, she had a poster on her wall that said: "Maybe the reason things aren't going according to plan is that there is no plan."

If you want things to go according to plan, you must have a plan.

Reason three: Odd as it seems, it's easier to change your plan when you have a plan. In every campaign, things will happen that you don't expect, and you have to deal with them when they come up. It's enormously easier to deal with the unexpected, when

the expected has already been taken care of. Having a plan for the expected leaves you free to focus on the unexpected.

Reason four: A plan will force you to decide what not to do. Many candidates at the beginning of a campaign report the problem of not knowing what to do. By the end of the campaign, they have the opposite problem—they know too many people who have too many ideas of what to do. Having a written plan helps you to say to that person who wants to hire the Goodyear blimp, "That's a great idea, but it's not in the campaign plan."

Reason five: Adopting a plan forces you to make decisions. In politics, as in most aspects of life, it is easier to put off decisions than it is to wrestle with the pros and cons to make a final decision. Many campaigns never make crucial decisions, so their opponents make their decisions for them. You can't write a campaign plan without making decisions—such as which issues you will use and whether the candidate will campaign door-to-door.

Reason six: A plan gives you a yardstick against which you can measure your progress. A written plan sets goals and deadlines. For example, a plan might require that the campaign recruit half its precinct chairman by May 1st, or that the campaign will raise \$20,000 by June 15th. These goals and deadlines not only set a yardstick for the campaign, but they help the campaign measure its success.

Missing a deadline serves as a warning to you that the campaign is behind schedule or off track. Knowing there is a problem is the first step in fixing that problem.

Here are the steps that you should take when writing a campaign plan:

1. Studying the political environment.
2. Reviewing the key elements of your campaign.
3. Selecting your strategy.
4. Confronting the critical decisions of your campaign.
5. Putting tactics to your strategy.
6. Determining a price tag for your tactics.
7. Writing a finance plan.
8. Putting it all together

At the end of this section, you will know how to develop a winning campaign plan using your campaign strategy and tactics for your candidate's advantage.

STEP ONE

Study the Political Environment

1. *Find out everything you can about previous elections.* When Shakespeare wrote, "The past is prologue" he obviously had elections in mind. Voter history is the most reliable measurement of future voting intentions.

How many people in your district usually vote for your party? Which people are they? What kinds of party members do they vote for? Get the results, precinct by precinct, for the past several elections, and find someone who knows how to crunch the numbers on a spreadsheet (you can do this by hand with a calculator, but it takes more time).

You need to be able to answer questions such as these: If we do as well as the best Republican in our home county, do we need to do better than the worst Republican in our opponent's county? Or, if I only get 85% of the vote our Republican candidate for governor got in 2014, how much do I need of the Democrat vote? Or, in which areas of town are we most likely to find people who voted to re-elect our Republican Congressman, but voted Democratic for everything else?

2. *Determine your district's demographics.* Although you may have lived in your area your whole life, you need to take a fresh look at your neighbors. Demographic research often starts with "windshield research." Drive through the district and look at how people live, and where they work. If available, look at the census data for the neighborhoods in your district. How much money do they make, what kind of houses do they live in, what is the ethnic makeup of the district? Find out everything you can.

3. *Discover the cost of advertising.* Find out what it will cost to advertise in your district. Check out prices for TV, radio, newspaper, outdoor advertising and mail.

Some local races can't afford television; some must have it. Price out how far \$50,000 or \$100,000 will go in your TV market. What will that get you? Look at cable TV too. What cable companies serve your district and how expensive are they? What networks do they carry? How many people subscribe to cable? Major newspapers are rarely effective for small political advertising, but weekly newspapers in smaller communities are. See what a half page or full-page advertisement costs.

Find out which radio stations (you can easily find this information on the Internet) enjoy the most listeners in your district/area. What is the average cost for an ad on these stations? Radio may broadcast to a wider area than just your district, but probably less wide than your TV market.

What about billboards?

Postage costs the same everywhere in the country, though they raise the rates just about every time you turn around.

How much would it cost to send four mailings to every address in your district? How about four mailings to half of them? (How would you decide which half?) In comparison to the costs of mailings, do other methods of advertising save you money or just waste it?

4. *Make a realistic determination of the attitudes of the press.* Is the news media at all interested in your race? In some smaller communities, local political news is one reason for the continued existence of the local paper. But many Americans live in metropolitan areas where local elections are beneath the notice of TV and radio, and even the metro section of the newspaper.

If the local weekly paper will cover you once a week, you need to be sure to have a news event each week for them to cover. If they won't cover anything you do, spend your time and effort on something else.

Sometimes there's a difference between news coverage and editorial coverage. For example, in Northern Virginia, Washington Post reporters only cover local elections when there's a scandal, but the editorial page does make endorsements in almost every race.

Finally, make a frank assessment of media bias. Some papers are friendlier to Democrats than others; some reporters are more fair and likely to tell our side of the story. Try to determine what kind of attitude your candidate will get...and don't assume that all reporters are liberals who hate Republicans—most reporter are honest and call the shots as they seem them. Sometimes party members don't receive good coverage because they don't try hard enough to earn it.

5. *Determine what effect local, state, and national events will have on your race.* While it's difficult to foretell the future, you can read the present. What statewide and national people and events will affect your campaign? In order to win, will you have to run ahead of or behind the statewide party ticket? How about the candidate for Governor? How will you run compared to the party candidate for county executive? What issues will the candidate for U.S. Senate talk about that you may have to, or want to, talk about also?

STEP TWO

Evaluate the Key Elements of Your Campaign

Key element #1. Your Candidate

The first, and usually the most important, key element of a campaign is the candidate. Although campaign techniques and technologies are important, political campaigns are primarily contests of candidacies.

Why is the candidate so important? The campaign derives its energy, its purpose, and its direction from the candidate. The candidate is, quite simply, the chief asset of the campaign.

The candidate is the head of the campaign, the chief vote winner, the chief spokesman for the campaign, a representative of his party and the campaign's chief fundraiser.

A candidate for public office is - and must be - the living embodiment of the values, beliefs, hopes and aspirations of large numbers of citizens—a symbol of our democracy.

Every campaign must begin with an honest assessment of who the candidate really is. You must make a frank and honest determination of the candidate's strengths and weaknesses.

Does the candidate have the ability to carry the load? Look at the candidate's:

1. Integrity
2. Expertise, experience, and wisdom
3. Ability to generate good will
4. Ego
5. Resiliency
6. Stamina
7. Understanding of why he or she wants to be elected

Now is also the time to look at those things a candidate will not do. Some candidates will not:

1. Ask their friends for money
2. Ask perfect strangers for money
3. Wake up before 5:00 a.m. to campaign at factory gates
4. Brag about themselves and their accomplishments

5. Say anything harsh about their opponents
6. Stay away from home overnight

Whatever the candidate's personal traits and/or foibles find them out now. Decide how the campaign can fix them, deal with them or learn to live with them. Also, don't make the common mistake of underestimating your candidate's strengths.

Key element #2. Your Organization

A candidate needs to be a leader. To be a leader, one needs followers. That's one reason the second key element of the campaign is organization.

A successful political campaign needs generous amounts of wisdom, talent, and work. Let's look at each.

1. *Wisdom.* A political campaign must make tough decisions under enormous pressure. What to do when your opponent attacks; Whether to spend money you don't have; how to take a stand on an issue other candidates on your ticket won't like; the list is endless. For all these decisions, the candidate must draw on the wisdom of experience. This might be the candidate's business partner, the Republican chairman, a former elected official, a political consultant, or the candidate's spouse, but a campaign needs one person, or maybe two (but no more than two), who will help the campaign think about the campaign and make decisions.

How wise is the person who fills this role? How much does the candidate really trust him or her? A campaign with wisdom can take risks that a campaign without it must avoid.

2. *Talent.* A person who can write well is very helpful to a campaign that relies heavily on press releases. A person who is very organized is vital to a campaign that plans door to door activity. A person who is good on the phone helps the candidate get appointments to ask for support and money.

The tactics in your campaign should be planned with an eye towards the people who will have to carry them out.

3. *Work.* If you plan major door-to-door drives or telephone activity, lots of people have to be involved. Where could those people come from? Are there experienced party volunteers available? Does the candidate enjoy the strong support of an active civic association, church, or interest group from which to draw volunteers?

The wisdom and talent and work available to you is one of the key elements of your campaign.

Key element #3. Adequate Finances

The third key element of a viable campaign is adequate finances.

You don't necessarily have to out-spend your opponent to win, but you must have enough money to communicate adequately with the electorate. That is why knowledge of the costs of communication is so important in the planning process.

You need to know where the money will come from to fund the campaign. Who are the major contributors to your party's candidates in the district? Will they support you? Who might give from outside the district? Is your candidate ready to spend 30% or 40% or more of his or her time raising money? And how much of a financial contribution can the candidate make personally?

The bottom line is that virtually every campaign for public office will require some level of fundraising and spending. Your candidate must be able to raise enough to give himself/herself a fighting chance to win.

In addition to budgeting the money it will take to run the campaign, consideration must be given to the personal finances of your candidate. Your candidate must know how his/her personal financial obligations will be met during the campaign.

Key element #4. A Vulnerable Opponent

The fourth key element is a vulnerable opponent.

Is the opponent someone who is in trouble or who deserves to be in trouble? Voters understand your candidacy most easily by understanding the differences between you and your opponent.

What is the difference? You should be able to state it fairly well at the beginning of the campaign.

Don't rely on opposition research to turn up something completely new. Your research on your opponent will help you flesh out and document things that are (among political people) already fairly well known. It usually won't pull a rabbit out of a hat.

Suppose your opponent voted for that dumb idea to impose a city income tax. Or got a bad editorial in the newspaper because of city involvement in a shady cable TV deal. Or had his jaw broken in a fight at a bar. Suppose your opponent is 81 years old. Those are things that make a vulnerable opponent. Even though the voters have mostly forgotten

or forgiven, they can be reminded.

In his book *Flying Upside Down*, Joe Gaylord says that a campaign depends on "confidence, contrast, controversy, and creativity."

Use your creativity to create contrast and controversy with your opponent, rather than pinning your hopes on finding a silver bullet.

Key element #5. A Base of Support

The fifth key element is a base of support.

Imagine it's the first week after the campaign has officially announced. Who will you go to ask for votes, money, or information? Who will tell their neighbors you're the one for the job?

Identify who, right now, will support your candidate automatically.

This could include (but might not) your party or other political or interest groups. Your base might be geographic - people from your candidate's end of the county instead of your opponent's end. Or people who go to your candidate's church instead of the opponent's church. It might be people who, for some reason, dislike the opponent.

It might include people who graduated from the same college as your candidate, or people who work at the same factory or people who serve in the same civic organizations. It is extremely difficult to get a campaign off the ground unless some people start out on your side. You need to think about who they are so you can plan to make them count.

STEP THREE

Develop a Strategy

Now, we're ready to discuss campaign strategy. Developing a campaign strategy is not as tough as it sounds. We each create and implement strategies as part of our everyday lives. We have a strategy for commuting to work, dealing with how use of the home computer is allocated or even figuring out how to garner enough support as the head of a committee to pick new carpeting for the church. Many of us are armchair sports strategists.

The difference between these strategies and campaign strategy is only a matter of degree—campaigns are bigger. A good campaign strategy must be written down on paper.

Your campaign strategy is simply a statement that describes how you will win. A political campaign should be able to write its strategy on one sheet of paper. The strategy should describe the coalition of voters you will assemble behind your candidate, the issues you will use to win those voters, the contrasts you will draw with your opponent and perhaps some of the major programs your campaign will undertake.

One way to develop a strategy for your political campaign is to answer these four questions:

1. *Who might vote for your candidate and why?* The ultimate goal of the campaign is to win the election, and that means influencing voters. You must know which voters you are trying to influence. You might say you are going after shipyard workers, or Baptists, or farmers, or conservatives, or voters in Franklin County, or people who favor a longer school year. You have to identify or label the people you are going after in order to fix them in your sights.

If you have party registration in your state, or if you have access to a poll, it's traditional to say that you need a certain percentage of the Republicans, Democrats, and Independents to add up to a majority. In any case, you need to be sure that the number you are trying to reach adds up to a majority.

2. *How do you prevent your opponent from reaching 50%?* A political campaign is not like the hundred-yard dash at the Olympics—it's more like the chariot race in Ben Hur. You don't just run your own race; you must also try to knock the wheels off the other fellow's cart. One of the best defenses really is a good offense.

A few years back a Republican candidate for the state house ran in a district with three rural counties. His opponent was well known throughout the district and started the race ahead. The Republican knew he could carry his own county but was behind in the others.

He calculated that if he kept his opponent from winning the county neither he nor his opponent lived in, it didn't matter how much he lost the third county by. He concentrated his efforts on that county and won, despite being outspent two-to-one.

In another race, a Republican candidate might calculate that the Democrat cannot win without the support of the teachers, or the unions, or the environmentalists, or the

Italian neighborhoods.

Your strategy should include taking away some of the votes your opponent needs.

3. *What do voters need to know, think or feel about your candidate on Election Day?*
In many cases your campaign theme or slogan should be a short statement of what you want the voters to understand about your candidate. For example, if your candidate is the best qualified by experience to hold office, your slogan might be, "Experience counts". If your candidate has no experience in politics, your slogan might be, "The politicians have had their turn; now it's the people's turn." Try to avoid slogans that are simply pretty words strung together like beads on a string, such as "Concern, Work, Faith for Tomorrow."
4. *What do want the voters to think, know or feel about your opponent on Election Day?* Very few of our opponents will do us the favor of putting their worst foot forward. It is up to your campaign to define your opponent for the public.

This is not to say that your campaign strategy must attack your opponent, although sometimes it is necessary to do so. The responsibility of your campaign is to ensure that the public knows the key differences between you and your opponent.

In most cases, your definition of yourself and your opponent will work together for a clear contrast between the two. The voters deserve to know the difference that voting for one candidate over another will make in their lives. Your task is to define that contrast.

A Strategy Check List

When you have developed your campaign strategy, see if it can pass this test:

Are you comfortable with this strategy?

Grudging acquiescence by the candidate will not last through Election Day. In the long run, no one can make the candidate act like someone other than who he or she really is.

Can you really get the resources to carry it out?

Some strategies call for the campaign to raise six times more money than has ever been raised before in a similar race. Some call for a volunteer on every block, which the campaign will never have. A good strategy must be based on a realistic assessment of the campaign's ability to gather resources.

- ❑ *Have you tested the strategy on "significant others"?*
No strategy can withstand strong opposition from the candidate's closest friends. Even if the candidate is comfortable now, your strategy won't succeed if the candidate's spouse hates it, or her business partner thinks it's undignified.
- ❑ *Does your strategy fit available research and survey data? Does your strategy survey the reality check of survey data and the research you have assembled? A good strategy must be based on the situation as it is, not as we would hope it is.*
- ❑ *Is it easily understood and conveyed?*
No strategy will do any good if the people who have to carry it out can't understand it. Make sure that the strategy is written in clear, unambiguous terms.

STEP FOUR

Make Critical Decisions Now

The next step in planning your campaign is to confront some decisions that will be critical to your success. These are the tough choices you will face during the course of the race that are best decided now, rather than later when you and everyone else is under pressure and strain. Since every campaign is different, the list of key decisions will be different, and no list we place here will be complete. Here are some possible critical decisions that most campaigns should deal with.

1. *The candidate's public position regarding other party candidacies.* No candidate runs for office in a vacuum—there are usually other candidates running for office for higher and lower offices. Some are shoe-ins and others are very long shots—some can help you and some will hurt you. Your campaign must adopt a policy to deal with the various other party campaigns. There may well be candidates who want to attend your announcement or leave material at your headquarters. How do you identify them? What do you tell the ones you would rather avoid?
2. *Disclosure of personal financial information.* Your opponent, or some reporter, may demand to see your candidate's tax return or other personal financial information. What will you do? It is best to figure out a response now than juggle the problem under pressure.
3. *Contributions from questionable sources.* A contribution from an alleged polluter or an accused drug dealer or even a single-issue lobbyist may be too hot to handle in your race. Whose help can you not afford to have? You need to decide now, before that \$1000 check is in the bank. This can be especially tough when

the person or organization's help you have to turn down is really a friend who does not deserve the bad rap they have taken.

4. *Controversial endorsements.* Some of your candidates' allies may be the key to victory, but could also be a target for your opponent to shoot at. Equally difficult to deal with are potential defectors from your opponent's camp. Would the endorsement by the leaders of the ACLU destroy your opponent's coalition, or would it signal your conservative supporters to stay home?
5. *Debates.* Will you debate your opponent? How many times and under what circumstances? Will you issue the debate challenge or seek to avoid debates? It is best to decide this before the media decides for you.
6. *The role of the candidate's family.* Do spouse and children want to campaign side by side with the candidate or would they rather stay away? Does the spouse want to be in on key decisions? These issues should be addressed up front rather than be allowed to fester until an explosion occurs.
7. *The degree to which your campaign will attack your opponent.* If your opponent has done something reprehensible, you should plan to use it to the fullest, or leave it alone. Many campaigns reject negativism at the beginning, but then slip into it during the heat of battle. That is the worst of both worlds, and rarely works. If the voters feel that the candidate finds his own campaign tactics distasteful, they are not likely to be persuaded.
8. *The candidate's time commitment.* No candidate can concentrate on the campaign if the family business falls apart or if spousal issues arise. How much time can the candidate realistically devote to the campaign? How much time must be devoted to business and personal life?
9. *The candidate's position on controversial issues.* Whether it's abortion or rezoning, there will be issues that you'd prefer to ignore but the campaign will have to address anyway. If possible, force your candidate to sit down and decide from the beginning what his or her position is. Sometimes simply forcing the candidate to write a paragraph on an issue can crystalize his opinion. Make sure the candidate is willing to stick with their position once taken. The worse of all scenarios is one where the candidates stakes out a strong, public position and then waffles.
10. *The resources that will be invested in neighbor-to-neighbor campaigning.* As more and more families need two paychecks, it's harder and harder to find people to go door-to-door. It can also be difficult to find anyone home when you do go to the door. Still, a personal request by a neighbor will swing the votes of many

people who are turned off by other forms of political communication. How strong is the local party in your area? How many volunteers can they provide? How much can you build with your candidate and the resources you have available?

11. *The resources you will put into your voter identification and turnout.* With low voter turnout, campaigns face tough choices on whether to invest in voter turnout activities. On one hand, many elections could be won if it were possible to locate every single registered supporter and drag them to the voting places. On the other hand, no one will vote for you unless you give them some reason to think you care about what they care about. Can you do both jobs? If you only do one, which one will it be? Will some other campaign turn out your party's hard core for you?
12. *The authority to spend or commit money on behalf of the campaign.* Most campaigns that end up with huge debts do not plan to do so. They have debts because either no one is watching the checkbook, or too many people had the authority to spend money. The campaign must settle this question early before spending gets out of hand.

STEP FIVE

List the Tactics the Campaign Will Use to Implement the Strategy

Once all the preparatory work is done, the tactics of the campaign begin to fall into place. When you have analyzed the campaign environment, selected a strategy and made the key decisions, then you will be ready to invest your resources.

Make sure your tactics follow your strategy. Beware of the campaign plan whose strategy calls for winning the senior citizens but whose tactics call for the candidate to campaign exclusively at high schools.

You don't have enough time or money to perform tactics that don't advance your strategy. It's on the level of tactics that many great campaign strategies are thrown away. Money gets spent and time used up executing tactics that have nothing to do with your plan. It's easy to lose faith in your strategy and start copying what other campaigns have always done.

Set dates for your tactics. Don't just write that you are planning to do a mailing to senior citizens. Write down that you are sending out a letter to senior citizens on October 18th: you are writing the copy by October 1st, getting approval from the candidate on October 5th, sending it to the printer by October 10th, and mailing it on October 18th.

Putting the tactics of your campaign on a calendar or critical path chart is one way to be sure that your tactics are associated with dates. The key strategic objectives in your campaign probably demand multiple tactics.

Suppose your strategy involves winning 60% of the senior citizen vote. Your tactics might include:

- Three mailings to voters over age 65
- Press releases announcing a senior citizen council
- Campaigning at senior citizen homes and in neighborhoods with lots of retired people
- Campaigning in certain churches on Wednesday night
- An absentee ballot campaign
- Organization of a group of senior volunteers
- Advertising on specific daytime radio shows
- A Facebook campaign geared toward seniors in your district.

Here is a partial list of tactics your campaign might include:

Door-to-door literature drops
TV advertising
Radio advertising
News releases
News conferences
Advocacy telephone calls
Direct mail
Distribution of flyers
Campaign organization
Campaign headquarters

Volunteer recruitment
Newspaper advertising
Billboards
Public appearances
Debates Questionnaires
Campaign rallies Canvasses
Candidate scheduling
Absentee ballot program
Digital advertising
And many more....

Write at least a paragraph or a to-do list for each of the tactics.

STEP SIX

Determine the Price Tag

Figure out how much all this is going to cost by categorizing or listings items. Make estimates on costs as best you can. A few telephone calls will determine the cost of TV, radio, newspaper, billboards and other advertising. Some additional research will reveal the monthly price tag for a headquarters, phone, office equipment and other related

costs.

Another reason to set dates for your tactics is so that you know when you have to pay for things.

Target dates enable you to write a cash-flow budget and finance plan. Schedule your campaign tactics on a calendar and put a price tag on each activity and total at the end of each week.

Now you know when you need money and can build a finance plan to raise it.

STEP SEVEN

Outline Methods to Raise the Money

After you have determined how much money you will need to fund your campaign, write a plan that details how that money will be raised. Divide fundraising into the categories of candidate fundraising, fundraising events, direct mail fundraising, finance committee fundraising and whatever other programs you plan on using. Set goals and deadlines for each segment. (We'll talk more about how to raise the money under the Fundraising section of this manual.)

Your fundraising should go hand-in-hand with your tactics. If you plan to do some district-wide radio advertising in March, you will need to schedule some fund-raising activities in February to pay for it. And you probably should not schedule the last big fundraiser of the campaign on October 25 if you need to pay for your TV on October 20.

STEP EIGHT

Putting It All Together

Both political parties have been teaching the need to use a written plan and strategy for more than 50 years. But many campaigns don't write one; and many of those that do, don't use it.

People have the attitude that campaign planning is mysterious, that it's hard, and that it's dull. We've taught you that it's straight forward and relatively simple. We also think that writing a campaign plan can be fun (well, for the campaign geeks, anyway).

Of course, it's work too. Planning demands thoroughness. As Thomas Edison said,

"genius is ten percent inspiration and ninety percent perspiration."

Here's how to make it fun work; and get it done.

1. *Pick the group of people who will be your campaign planners.* Tap at least three people; no more than seven. This includes the candidate, the campaign manager (if you have one), the candidate's spouse, the one person on whom the candidate relies on for wisdom (not six friends who want to show off), and two or three people who will serve (paid or not) as the campaign staff.
2. *A week before the planning meeting, give the group this section of the manual on Campaign Planning.* Provide them with election history information and ask them to take a windshield tour of the district. Have someone match up the election history with the way each precinct looks. Assign one or two people to research advertising costs.
3. *Gather the group together at a place where you can get some work done without too many interruptions.* Set aside a day and convene the group together in a comfortable setting, with a big easel pad and markers for someone to write down what's said.
4. *Talk about the five parts of the political environment.* Don't force people to fight out their disagreements or to come to conclusions on each of these; that will just divide people. Instead, let everyone mention their observations and opinions about the political environment. Encourage the group to add to each other's ideas. Just keep writing things down on the easel as people say them.
5. *Now talk about the five key elements of the campaign.* This is harder and more personal, but you have momentum going. Impose the same rules you used for the section above. Don't paper over your problems. Your candidate is not perfect, and neither is your political environment. But dealing with those problems will be even tougher when you have to do it under fire.
6. *Next, make a first run at defining your strategy.* Use the same rules again at the beginning, taking the four questions one at a time; have everybody throw out ideas. Now comes the tough part. You've listed great strategy ideas, but you can't do them all and some of them contradict each other. Go back and invite the people in the room to trim down what's been said into the simplest campaign strategy that answers the four questions. The candidate talks last and, based on everything said, lays out where the campaign should go.
7. *Everybody suggests one thing they would change in the candidate's strategy.* The candidate says whether he agrees or disagrees with the changes. Now, you have a

strategy.

8. *List the major tactics that will implement the strategy.* All tactics flow from the strategy. The members of the group should list every tactic they can think of to implement the strategy. After all the ideas are listed, go back through and delete those that are too expensive or too complicated.
9. *Put price tags on each of the tactics.* Have at least one member of the group work on adding up all the price tags during this discussion. After all the costs are added up, hold a frank discussion about whether the campaign can raise the money to fund all these programs. If the answer is "no", go back to the list of tactics and delete those that the campaign simply can't afford.
10. *Now put everything on a time line or calendar.* Put all the tactics on a time line. By doing so, some tactics will reveal themselves to be redundant, and others will show themselves to be impossible to execute in the amount of time given.
11. *After the meeting, produce a written version of the plan.* The plan should be circulated to everyone that attended the meeting. Give everyone a deadline of three days to read and think through the plan and give you their feedback.

At the end of this process you have a written plan; and a plan that everyone understands. Better yet, you've created a team. You're ready to go out and win.

Afterword

Remember the third reason for having a plan—it's easier to change that way. You need to check on your plan so you know when it's time to change. Every month or so—the candidate and two, maybe three, others, should sit down and look again at the plan. Review your strategy questions. Do you still know who should be voting for you and do they know why? Are you preventing your opponent from getting 50%? Are your candidate and your opponent becoming who you want them to be? Some parts of the plan will need adjustment, and some may need to be redone from scratch.

Your campaign plan is your map. If one road is unexpectedly blocked, go another way. Finally, don't despair if your campaign gets off track from the plan. Dwight D. Eisenhower said, "In preparing for battle I have always found that plans are useless, but planning is indispensable." Your campaign will only be improved because you planned.

Campaign Structure

Introduction

The campaign strategy and the campaign plan should dictate the form of the campaign. Campaigns that plan on buying a lot of television time will need a large fundraising structure. Campaigns that intend to maximize earned media should hire a press secretary and put resources into getting coverage. Form should follow function.

That said, every campaign should perform common tasks. Meaning a group or person must make decisions and someone needs to deposit the checks and pay the bills.

These functions may be performed by the candidate, the candidate's friends, party workers, full-time volunteers or paid staff. Below is a listing of universal campaign tasks.

Common Campaign Tasks

Scheduling. Decisions must be made about what to do with the candidate's time. Since the candidate is a valuable resource in every campaign, special care must be made to ensure that his/her time is not wasted. The campaign should schedule the candidate to persuade voters, gain media attention, raise money and recruit and retain volunteers.

Fundraising. Political fundraising is best described as a gathering of the monetary resources of the campaign. Every campaign raises some money, except for those rare cases when the candidate writes a big check and pays for the whole thing. Money will not walk in the door of the campaign headquarters by itself; contributors must be solicited, tickets sold, and fundraising mailings sent out.

Administrative Duties. Some administrative functions are unavoidable for the smallest of campaigns. Someone must perform such tasks as keeping the office supplied, answering mail, filing reports, answering the phone, fetching and opening the mail, stuffing envelopes, buying stamps, fixing the jammed printer, data entering, typing, etc.

Media Relations. Every campaign will have some interaction with the media (TV, radio, newspapers, Blogs, church bulletins—any system that distributes information). The campaign will either solicit coverage by the media or respond to their queries. Information control and distribution are a part of nearly every campaign.

Voter Contact. Every campaign will attempt to communicate information to voters. Most campaigns will seek to buy access to information sources in the form of advertisements on TV, radio and/or newspaper. Some campaigns will buy space on billboards, put up

signs, conduct mass mailings, send out e-mails and purchase other media. Most campaigns seek to create their own information dissemination systems, such as literature drops, door-to-door distributions of flyers and/or voter contact through the phones.

Research - Good opposition research can win a campaign. Just as the coach of the Dallas Cowboys will study Buffalo Bills game films and seek information about the stadium he will play in. Additionally, the coach will research the strengths and weaknesses of the players their team will face. A candidate for office should research their opponent in the same manner. Also, most candidates are not experts on every issue, which is why many campaigns also engage in issue research.

Comptrolling. A campaign is a business. That means checks need to be written, deposits made to the bank, and records need to be kept. Large campaign debts are usually a function of bad record keeping and inattention to the bills owed and the bank balance. Processing contributions and bills, monitoring income and outgo are necessary functions of every campaign.

Management of Resources. Campaigns must be managed. Without some central coordination of people and resources, a campaign will fall apart or spin out of control into dozens of directions. Direction must be given to volunteers and staff. Strong goals and deadlines must be set and quality control must be enforced.

Decision-making. Every campaign must make decisions. Every single day the campaign will make decisions that will affect the outcome on Election Day. Sometimes those decisions will literally decide the election; most will not, but it is hard to tell the difference until after the election. There must be a system for making those decisions, whether final decision-making authority rests with the candidate, the campaign manager, the steering committee or the candidate's best friend.

Staff positions

Somebody should execute the functions listed above. In large statewide campaigns, a staffer or two may be hired to implement each function. In smaller campaigns staffers may be hired to take responsibility for two or three functions. Races for local office may fill these slots totally with volunteers. Here is a listing of jobs in a typical congressional campaign.

Campaign Manager. The campaign manager's job is to run the campaign, to see that the campaign plan is implemented, and if it can't be, to see that the plan is re-written. Duties include supervision of fundraising and media activities, serving as an alternative spokesman for the campaign, making decisions on a day-to-day basis and supervising

the campaign staff. In sum, the job of the CM is to make sure the campaign happens.

Media Director/Press Secretary. Duties include preparing speeches, writing news releases and radio actualities, setting up press conferences, scheduling media events, responding to media inquiries and hobnobbing with reporters. Keeping the media list updated and insuring that releases and actualities get sent out are also important duties. In many campaigns, this person will also coordinate, or even produce, the advertising. Often, the press secretary is responsible for managing social media accounts and implementing e-mail blasts.

Finance Director. The Finance Director is responsible for organizing and supervising the campaign's fundraising operations. Duties include organizing fundraising events, supervising direct mailing, scheduling (in coordination with the scheduler) the candidate with large donors, and recruiting and working with the finance committee. The Finance Director will often work with the digital media staffer to prepare fundraising e-mail blasts.

Scheduler. The scheduler is the main staffer that oversees the candidate's schedule. Duties include publishing a schedule for the entire campaign staff, preparing a schedule for the candidate, making up a "sanitized" schedule for the press, writing and sending thank you letters, confirmations and rejection letters/e-mails. The scheduler is also responsible for keeping accurate files on all invitations and dispositions. The scheduler should be aggressive and look for scheduling opportunities rather than respond only to requests. Only the scheduler should be allowed to put events on the schedule, and all scheduling opportunities must be cleared with the scheduler before they are agreed to.

Digital Director. More and more campaigns are assigning a staffer to dealing with the internet, social media and digital advertising. Often this person will be responsible for interfacing with the campaign's database.

Driver/Personal Aide. The candidate's personal aide is a vitally important position in the campaign. Duties include driving, keeping the candidate looking fresh (particularly if he/she isn't) and properly dressed, checking in with the headquarters at each event, insuring the candidate is fed, rested and properly briefed about each campaign appearance, and keeping the candidate on schedule.

Office Director. The office director's job is make the office run as smoothly as possible. Duties include making sure enough volunteers work in the office so that routine duties are handled (such as phone answering, receptionist duties, literature distribution, etc.). Often this person is also responsible for solving problems with the office physical plant (a/c works, enough phones are installed, printers have ink and paper, etc.) and insuring that the staff has the materials they need to do their jobs.

Comptroller. The comptroller should deposit all checks, eyeball each contribution to be sure that corporate checks are not cashed and insure that careful records are kept of all contributions. They should also insure that a daily summary is produced for the Campaign Manager that tracks each day's contributions and outlines all debts and obligations.

Treasurer. The treasurer's job is to write checks for the campaign and to file disclosure and election reports required by law.

Political Director/Field Coordinator. The Field Coordinator oversees the field operation of the campaign. Duties include serving as a liaison and coordinating with the town or county political committees, forming a voter contact organization, literature and sign distribution, liaison with the party auxiliaries and doing the advance work necessary to ensure that the candidate's campaign time is well-organized and well-coordinated. A campaign covering a large geographic area may need several field people.

Volunteer Jobs

The jobs listed below can be performed by staff in large campaigns and volunteers in smaller operations.

Campaign Chairman. The chairman heads the steering committee and/or serves as the titular head of the campaign. The chairman should be the best known, best connected supporter; someone admired in the community for his or her leadership qualities; someone whose phone calls are always returned.

Research Director. The research director is responsible for seeing that your opponent's record and the issues in the community are clearly understood.

Yard Sign Chairman. The yard sign chairman supervises distribution and emplacement of yard signs. Some candidates feel this is one of the most important jobs in the campaign. Find someone with lots of time who likes working with his hands to fill this job.

Legal Advisor. Find a lawyer to serve as legal advisor to the campaign. Their job is to keep the candidate out of trouble, and to be on call to fight vote fraud on Election Day.

Election Day Chairman. Sees that the polls are covered with volunteers on Election Day. They are usually in charge of giving rides to the polls, and other Election Day activities.

Volunteer Chairman. At a minimum, this job involves bringing people into the headquarters to help out. But the real job is to identify the talents of everyone who wants to help in the campaign and making use of them.

Headquarters Chairman. The HQ Chairman insures that the headquarters is a place where volunteers will want to work. His job is to make the headquarters a friendly place and insure that the office has plenty of volunteers when they are needed.

Finance Chairman. This is the volunteer who coordinates the efforts of other volunteers in raising money. Usually a person of standing in the community, this person's job is to nag others into doing what too many don't want to do—ask for bucks. A vitally important job.

The fact is that a campaign for Congress may entail hundreds and sometimes thousands of volunteers. Many of these people will not have fancy titles, but they serve as the foot soldiers of your candidate's army. There are just about as many job descriptions as there are people in a campaign. The important thing is that people know what their duties are, what is expected of them and that they are thanked properly for their efforts.

Management/Decision-Making Structure

How decisions are made in a campaign will ultimately determine if the campaign is victorious on Election Day.

The model most campaigns use is hierarchical in nature. The idea is that someone is at the top of a management pyramid and delegates decisions downward to subordinates, who then delegate down to other subordinates. This seems to work in the U.S. Army, and it might work in corporate America, but it is not necessarily a good model for a volunteer-intensive campaign.

Campaigns are based upon the work of many people who are not paid to be subordinate to anyone. They work best when they have something to say in the way the campaign is run, and when they are informed about what is happening and why. They have talents and ideas to contribute and the foolish campaign neglects their input.

Steering Committees

For maximum results, a campaign management structure should include as many volunteers/people in the process as possible. Many campaigns attempt to include people by forming steering committees and/or kitchen cabinets. A steering committee is a group of people who meet periodically with the campaign manager and/or the candidate to give advice and input on key decisions. A kitchen cabinet is a less formal

group that meets with the candidate "around the kitchen table". They tell the candidate what they are hearing and provide feedback to the candidate's ideas.

Some campaigns also hold monthly campaign meetings, where every volunteer and donor is invited to hear a presentation about what the campaign is doing. Everyone should be encouraged to give the campaign manager and/or chairman their feedback.

Decisions must be made in a campaign. Many times, not making a decision means that your opponent, or the media, will make the decision for you—and usually not to your liking. The decision-makers in the campaign should get as much input from the volunteers and workers as possible, but most decisions should not be made by committees.

Everyone makes mistakes, and no matter who makes decisions in the campaign, some mistakes will be made. The important thing is to learn from the mistakes and move on.

Campaign Consultants

Campaign consultants are hired to do things the campaign can't do itself. Few of us have the technical skills necessary to produce effective television advertising. The campaigns that have experience in producing survey research can be counted on one hand. Campaigns hire consultants, for the same reasons businesses do, because it is cheaper and easier to hire expertise for specific projects than it is to pay full-time salaries for this level of expertise—assuming you could find it. The cardinal rule of consultants is to only hire them when you need work done, not because you think hiring them will impress others. The consultant is only as good as the job they do for you. Consultants are sometimes campaign decision makers, but since they are removed from the direct consequences, much of their suggestions should be taken with a grain of salt.

The Campaign Manager as the Decision Maker

The popular image of campaign manager in pop culture is of a grand planner who is supposed to make all the important decisions because the candidate was "untrained" or too emotionally involved in the campaign to think clearly. This model conveniently ignores the fact that the campaign manager is often untrained and sometimes even more out of control of his emotions.

The Candidate as Decision-Maker

Many candidates, particularly those with no management background, feel the campaign should simply be an extension of the candidate's will. This kind of benevolent dictatorship ignores the difficulty the candidate would have by serving in the dual roles

of manager **and** candidate. Being a candidate is tough enough without having to run the campaign as well.

The best model is a blending of the two styles. The candidate must trust the campaign manager to make decisions and give them the authority to do so and the campaign manager must take in inputs from the candidate as much as possible. The candidate must be consulted before making specific types of decisions that would directly affect the candidate. For example, decisions that affect the candidate's pocketbook, family integrity or values must be made by the candidate. Smaller day-to-day tasks may not require the candidates' attention, but key campaign decisions must be made by both the candidate and manager. For example, sending out a new mail piece on issue positions already agreed on will require little attention from the candidate, but if there is a new event or issue that arises in the middle of the campaign, a meeting should be arranged with the candidate to hash out a strong statement before any new publication goes out.

Early in the campaign, try to set up a system for making decisions and stick with it. If it's not working, set up a new system. If that's not working, try something else. There are no set guidelines on the decision-making process because each candidate works differently, and each campaign has its own challenges. However, make sure that the campaign does not become a one-man show and decision rights on different tasks are separated well ahead of time.

The important thing is to have a decision-making structure that will make decisions in a timely manner and make them stick. Also, everyone in the campaign must know how the system works, otherwise staff and volunteers won't know who to talk to for getting approval on projects and will spend far too much time trying to find the right person to make a decision.

Candidate Scheduling

The campaign scheduler should be a key component of the campaign staff, owing to the scheduler's interaction with the candidate, the campaign staff and the public. Often, the scheduler is the first campaign staff person contacted by voters or groups who desire access to the candidate. Therefore, the scheduler helps create the image of the candidate and the campaign.

In a perfect world, the scheduler would be super-human. Since there are few super-humans available, the number one attribute, the *sine qua non* of the job, must be organizational ability. The scheduler can't lose things, forget events or misplace invitations. Good communication skills are useful as is an ability to empathize with

others, but nothing beats attention to detail. Lastly, the scheduler must be able to take some heat and keep working, because the candidate's schedule never works perfectly and when things go awry, the scheduler will sometimes get the blame.

The Five Jobs of a Campaign Scheduler

1. Allocating the candidate's time within the campaign arena.
2. Allocating the candidate's time among events.
3. Responding appropriately to all requests for the candidate's time.
4. Maximizing the time available for person-to-person campaigning.
5. Preparing a daily schedule for the candidate and staff, as well as advising the media of the candidate's public appearances.

Additional Responsibilities

The scheduler works closely with the campaign driver/advance staff. The scheduler helps facilitate the four functions of the driver/advance staff: driving, instant advance, checking in, and staying on schedule.

The Three Givens

Schedulers begin with these three givens:

1. There are only so many days available between now and Election Day.
2. The geographic parameters of the district.
3. The number of potential voters the candidate needs to win.

The campaign must decide where and when to send the candidate in order to maximize the candidate's exposure to potential voters.

Always keep in mind one of the first questions the Campaign Plan should answer is:

Who should vote for your candidate and why?

The answer to this question guides you in determining how much time the candidate needs to spend in each part of the district with which groups of people as well as what the candidate should do to win votes.

Supply and Demand: The Candidate's Time

How do you deal with the limited supply of candidate time between now and the election? The first step is to divide the time into three units per day: the morning, then afternoon and the evening.

Look at the number of days between now and the election, and multiply by three. That's how many scheduling opportunities are available between now and Election Day. Since each opportunity involves a mealtime (breakfast, lunch or dinner), these can be used for a meeting or speech. You'll need to allocate time for other time demands that the candidate will have throughout the cycle, such as:

1. Occupational and financial demands.
2. Family commitments and personal days. (Consult the candidate's spouse to make sure family gatherings, birthdays, etc., are noted and family time scheduled.) Campaign staff and strategy meetings.
3. Media time, for radio taping, photo sessions or filming a TV commercial. Be sure to allow extra time—don't rush the candidate or your product won't be its best.
4. Joint appearances and debates—including preparation time if the event will be covered by the media.
5. Fundraising, phone time, and meetings.

Once all of these blocks of time are allocated, subtract them from the overall available time. Don't be surprised if conflicting demands take more than half of your scheduling units. You can always add events to the schedule; however, you can't get the time back you've already spent.

Now you're ready to allocate your available scheduling opportunities within the campaign area. Depending on the size of the geographic area your candidate is seeking, these could be precincts, counties, townships, boroughs, or neighborhoods.

Here's an example:

There are 100 days until Election Day. That gives us 300 units to schedule. Since the candidate doesn't campaign on Sundays that subtracts 12 days, or 36 units. He has to attend to his firm during business hours 1 day every week, which kills another 24 units.

He and his wife have planned their 20th anniversary trip to San Francisco, and that kills off five whole days, or 15 units. His daughter is on the swim team and he cannot miss any of the 3 meets which that kills off 3 mornings. Subtract those from 300 and that leaves us 222 we can schedule for the campaign.

However, because our candidate is not personally wealthy, he has to spend three mornings every week and two evenings raising money. That subtracts 60 more units, leaving us 162. We have to figure another unit per week for administrative and media production, so we really have 150 units of actual campaign time.

The district has 6 counties. Here is where he expects to get his votes:

Smith	20%
Jones	10%
Dithers	40%
Blowhard	15%
Schimoney	13%
O'Reilly	2%

We will allocate his time according to where he expects to receive his votes.

Smith	20%	or 30 units
Jones	10%	or 15 units
Dithers	40%	or 60 units
Blow	15%	or 23 units
Schimoney	13%	or 19 units
O'Reilly	2%	or 3 units

This means that you only spend one day in O'Reilly County, so it had better be a good one!

You must be flexible in your scheduling of campaign opportunities. Keep track of how many times the candidate is exposed in each geographic area in order to maximize the number of potential voters he/she will meet. Such exposure is best achieved by integrating appearances with community events, celebrations, county fairs and sporting events.

Campaign Events

Here's a list of ideas that can serve as a guide to the kinds of opportunities you should consider as you plan the schedule.

Not included in this list are fundraising events. Your candidate should spend around one-third to one-half of their time asking for money! This may involve ticketed events, appointments with potential givers, or dialing-for-dollars. In most campaigns, the finance chairman or finance director is responsible for how the fundraising time is used. But as the scheduler, you must be sure time is set aside for that purpose. And you should worry - aloud - if that time is not used properly.

1. *Political club meetings, rallies and dinners.* If it's important in your campaign plan to solidify your base party, attending rallies and dinners can be helpful. These can also serve as a forum for hard-hitting attacks on your opponent that would be less appropriate in another type of venue. It's usually wise to avoid functions where your candidate won't be a featured speaker. The rally is a dying art form. Getting a crowd together is becoming more and more difficult. Before you schedule a rally, make sure you're satisfied that it will be a success, and that it will be worth the effort. Speaking at a regularly scheduled political club meeting is much easier.
2. *Community service organizations.* Community service organizations, such as the Rotary and Jaycees, can be excellent forums for making a speech. One of your first jobs as scheduler is to identify these organizations and when they meet. Some have restrictions on political speakers, but allow nonpartisan speakers on discussions.
3. *Street campaigning.* Because it's hard to get a crowd together to rally for your candidate, you must send the candidate to where the voters are, not to make a speech, but simply to meet and greet.

Street campaigning is most effective later in the campaign, when the candidate is better known, and Election Day is closer. With all street campaigning, make sure the candidate has something to hand out.

Be sure to create an image of excitement and importance about any visit, so people who didn't have to chance to meet the candidate still know he was there. Here are some of the varieties of street campaigning:

1. *Business districts.* The candidate walks into stores and places of business, shaking hands with customers and merchants. The smaller the town, the better the results. The candidate's car, if decorated with campaign signs, can attract attention.
2. *Shopping center visits.* This works the same as in the business district,

except for one crucial step. You must first secure approval of the shopping center management before sending the candidate in.

3. *Grocery stores.* Most people shop at grocery stores near where they live, so campaigning at supermarkets is one of the few ways for the urban campaigner to reach voters who live in the district. You may want to locate all the grocery stores in the district and have someone research the times when they're busiest.
4. *Commuter stops.* Commuter stops can be an effective way to meet people in a suburban area. Even some rural areas have parking lots where van pools form for long commutes into the city. It's usually best to campaign in the morning when people are waiting for the train or bus, rather than the evening when they are rushing to their cars.
5. *Factory visits.* Factory visits are a traditional favorite. Schedule the candidate to work the factory gate when the workers are going into work, when they may pause briefly, rather than on the way out, when they won't. If the candidate is invited inside, decline the invitation to tour the plant with the plant manager. The workers don't always think favorably of the manager, so go around with one of the workers instead.
6. *Door-to-door.* For door-to-door campaigning, choose your neighborhoods based on your campaign plan. What voters are you targeting? Don't hit every house; instead confine yourself to three or four on each block. That way, the news of the candidate's visit will spread far and wide.
7. *Schools.* College and university campuses contain a lot of voters, and if you have one in your district, you need to speak with these voters. A good scheduling plan is to arrive on campus at lunchtime and have lunch in the cafeteria. Get the student body president to be your host. Follow up by talking with an actual class, perhaps a political science class.

An appearance at high school assemblies can be effective. You reach some voters, and you influence many parents. Schools can also be an important source of volunteers.

8. *Nursing homes and day care centers.* When going to a nursing home, your primary concern might simply be meeting the voters. Or, the candidate may visit a nursing home or day care center as an inspection trip, where the real purpose is to make a statement to the

press on some of the issues.

9. *Evening hangouts.* What do you do after it is too dark to go door to door? The scheduler should send the candidate to a local evening hangout, like a popular diner or a bowling alley.
10. *Charitable events.* While obvious campaigning is usually inappropriate there are benefits of attending and working the crowd in a low-key manner.
11. *Fairs and celebrations.* It's the scheduler's job to find out when and where the street fairs and local festivals are held. The goal is to get the candidate face to face with as many people as possible. An image of excitement and importance is also important here, so the candidate stands out.
12. *Ethnic gatherings.* The all-Lithuanian August picnic may be an excellent event to attend, but there are rules. Make sure you're invited! Make sure the candidate knows something about the group. Have the candidate practice saying foreign names that are difficult to pronounce—it will pay off.
13. *Sporting events.* Interrupting people who are watching a sporting event is a sure way to lose votes. But working the crowd on the way in, or when people are standing in a line at the concession stand, is often very effective. This is particularly true of high school football games in those parts of the country where attendance by the local community is almost mandatory.
14. *Issue organization meetings.* Before scheduling the candidate to speak to the local chapter of the Eagle Forum, ask the question, "What are we going to say to them?" If you can't say anything that will win votes, you should usually not go.
15. *Joint appearances and candidate forums.* If the press covers these events, then they must be scheduled, and preparation time must be scheduled as well. But candidate forums, where 14 candidates running for six offices are each allotted only three minutes to speak, are largely a waste. Avoid them if possible.
16. *Coffees and receptions.* The morning coffee hour in a private home is

largely obsolete. With so many women in the workplace, there are fewer people able to attend during the day. However, the morning is a good time to target senior citizen groups. The evening reception (i.e., cocktail party) where a local couple invites their friends and neighbors to meet you can be effective. But they only make sense when the host couple has the clout to turn out a crowd.

17. *Scheduled appointments.* In every community, there are opinion leaders worth meeting privately. These include elected officials, former candidates, newspaper editors, school principals, people who serve on charity boards, officers of the Chamber of Commerce, union leaders, ministers, and ethnic leaders.

All of these campaign activities can be effective; however, you can increase the effectiveness even more by having an event hosted by a popular local community leader of high integrity. This lends credibility to the candidate and affords a level of comfort when meeting people.

In addition, designate a staff person who will give the scheduler a list of individuals that need thank-you notes and acknowledgments of assistance to the campaign.

Responding to Invitations

A candidate for legislative or local office won't be overwhelmed with requests to come and speak. But each invitation you receive is important and deserves a polite and efficient response.

Except in special cases, you should ask that all scheduling requests come to the scheduler in writing. When someone calls, politely take notes, but ask that they send a follow-up letter or e-mail.

Requests come in two forms: specific date and open date. The specific date request has a definite time and date for the candidate to appear, while the open date asks for the candidate's appearance at any time.

Turn down events that hold no interest for the campaign, and turn down those invitations which conflict with an already scheduled event. Reject these invitations with a polite letter or e-mail signed by the scheduler or campaign manager, not the candidate. Your rejection letter should probably start with the words "I'm sorry...." This lets the people know up front it's a rejection, but shows that you valued their request. Keep records of any request of rejection. Sometimes during the campaign at least one

group will claim you said "yes", when in fact you said "no". Computer scheduling programs can help you manage the requests and rejections.

Accurate filing helps keep your excuses straight. You won't want to tell one group the candidate is out of town the day of their event and then accept an invitation to speak to a different group in the same hotel.

Then there are the "maybe/yes" invitations. Pick up the phone and ask the event sponsor more about their invitation; the sponsor will know that your campaign is on the ball.

Once a week hold a scheduling meeting to discuss the recent invitations. Possible participants at this meeting include the campaign manager, press secretary, finance director, and the organization director (assuming you have these). Actual attendance depends on campaign strategy and the skills and interests of the people involved. Accepted invitations get a "yes" letter. File them by date and locality. If a decision can't be made, respond with a pending letter signed by the scheduler or manager. The pending invitations need to be filed in three places: by date, by locality, and in a special pending file. The date file helps you to know what's coming up; the locality file lets you know what's available in a certain area; and the pending file, reviewed at the weekly scheduling meeting, reminds you what invitations still need a response. Again, there is scheduling software out there that can help you keep all this organized, though many schedulers still prefer paper.

Often you'll want to delay a decision until just a couple of weeks before the event is scheduled.

Never confirm a candidate's appearance more than 30 days ahead. Too many things can happen to change a candidate's priorities and timing needs. The final 30 days of a campaign are always hectic and many times unpredictable. Many scheduled events may have to be rescheduled or cancelled during this period. As the scheduler, you'll sometimes disappoint potential voters and supporters because the schedule can only accommodate so many requests. Most of these situations can be worked out; however, everyone may not be happy. The scheduler must handle these situations diplomatically to minimize a lasting negative impression of the campaign. Depending on the situation, it may be necessary to have the candidate call and give some of these people special attention to avoid hard feelings.

Making the Most of Person-to-Person Campaigning

Now is the time to consult your campaign plan and see what was decided about the importance of the news media in your campaign. If you're campaigning in an area of small communities, each with a local paper, your schedule will be aimed towards news

coverage first, people contact second. If you are in a district dominated by major metropolitan media that will notice your campaign no more than once, your scheduling will be aimed at maximizing contact with people.

Maximizing Door-to-Door Tactics

If door-to-door campaigning is in your strategy, here's how to get the most out of it:

1. *Target the neighborhoods you will work in advance.*
2. *Send postcards into those neighborhoods a few days ahead.* They can say something like this: "I'll be campaigning door to door in your neighborhood next Tuesday night. If I don't catch you at home, and you have any questions you'd like to ask, please call me at 634-5789." Make sure someone answers that line, or at least checks the messages constantly.
3. *Go door to door with volunteers.* They can include supporters and party members from that neighborhood, and your best volunteers who help every week. Your supporters say, "I'm campaigning tonight along with my candidate, Jane Jones. Here's some material about her campaign. I hope you'll vote for Jane." The candidate works a few houses on each side of the street that the volunteers cover.
4. *Have two types of material:*
 - a. A brochure for the homes where someone answers the door.
 - b. A door hanger with the same message and a reproduced handwritten message from the candidate saying, "Sorry I missed you."

We call this the maximum door-to-door tactic. Nearly everyone in the neighborhood will know that you cared enough to come to their area, and they're likely to respond by actually reading your material and making a decision to vote for you.

In a campaign that uses the maximum door-to-door tactic, the scheduler will work closely with the volunteer coordinator or the organization director.

Campaigning Enthusiasm

If the candidate spends a good deal of time working the bus stops, plant gates, grocery stores, etc., you'll want to attract attention to what the candidate is doing. Your goals are twofold: To get people who don't meet the candidate to remember

the name and to cue people who do meet the candidate to understand what's going on so they know how to react.

You need to create an image of excitement, enthusiasm, and importance.

One way to create this image is to surround the candidate with teenagers wearing campaign tee shirts and baseball hats. A possible problem is that children will be in school some of the time you need them. Try to recruit college students and home-schooled children, as they have more flexible schedules.

Moving the candidate around in a van or mobile home with banners plastered on the side, and parking the vehicle near where the candidate is working, is another way to get the desired effect (though it can be expensive).

Some campaigns store a giant yard sign in the candidate's van, mobile enough for the candidate and driver to set up, but substantial enough that it doesn't fall over. Other campaigns will set up a big sign in the back of a pickup truck with roughly the same effect.

Use your imagination for other ways to create excitement for your candidate and the campaign.

Publishing the Schedules

The Press Schedule

The press can't cover your candidate if they don't know where they are. Every week, send out a media advisory containing the candidate's public schedule. Obviously, don't put things on the schedule you don't want the media to cover such as meetings with large donors and production of TV ads. If there is something you really want coverage on, follow up with a phone call to ensure the schedule was received and "sell" the event.

The press schedule should go to all news media, as well as the key supporters, volunteers, and contributors, plus allies like Republican Party officials and friendly interest group officers.

In any campaign where the local news media might cover your campaign, nothing short of pneumonia can permit the candidate to cancel an event once it's on the schedule. That's because there's nothing worse than the news media seeing something interesting on the schedule, going out to cover the candidate, and finding no one there. If that happens once, they'll never go out of their way to cover your

candidate again. Campaigns with part time candidates should think twice about sending out a press schedule since so much of the schedule will be blank. Better send out media advisories few big events and let the mundane go unheralded.

The Daily Schedule

The daily schedule is for the use of the candidate, the driver, and the other members of the campaign team. The daily schedule tells the candidate and driver where to go and what to do in great detail.

Travel times from event to event must be on the daily schedule and accurate directions must be attached. The scheduler should attach the approximate mileage and a map of the area or community. With the proliferation of smart phones and car GPS systems, directions are less important than they once were, but provide written copies to the driver anyway just to be on the safe side. The name, e-mail address, cell and phone number of the contact person for each stop of the day should be included. This information is imperative to the driver in case the candidate is running a bit late or if the campaign staff needs to leave a message for any of the staff traveling with the candidate.

The scheduler and driver are ultimately responsible for the "care and feeding" of the candidate. There must be time left in the daily schedule to rest, and to eat, if there are no meal functions scheduled that day. Tired candidates make mistakes. Hungry candidates get cranky. Encourage the candidate to take a catnap while traveling between functions and keep some healthy snacks in the car.

Included with every formal event of the day should be a copy of the invitation, and an event information sheet that tells the candidate the name of the event, what's expected of them, other people attending that they may know or should know, how long to speak, whether there will be a question and answer period, and what clothing they should wear.

The candidate is under constant pressure, and should never be left in doubt as to where to be and what to do. The scheduler should also tell all hosts or contact persons which staff members will be traveling with the candidate.

The driver needs to keep a good watch on the clock and keep the candidate moving. It's rude to keep people waiting. Try never to be more than 10 minutes late; if it's more than that, make sure you call ahead to tell your host that you're on your way and will be there shortly. Also, if it's getting late, a staffer should excuse the candidate so it doesn't look like he's anxious to leave an event—let the staff person be the "bad" guy. Additionally, the easier you make it for the candidate, the

more energy he'll have to do what he really needs to do—campaign.

The Official Schedule

Your most important possession is the master schedule, which is usually kept on a shared calendar in Outlook, Google or one of the other programs. It doesn't hurt to have paper copies of the schedule either. Everything that is scheduled must be written in the calendar or put on the shared calendar.

Only the person with the scheduling book can put things on the schedule; sometimes you may have to lend that authority to others. For example, suppose the finance director says to you, "What are some times the candidate could meet with Fred Gotrocks?" You block out some times and "pencil" them in (make a tentative appointment). When the finance director enters a time on the schedule, that appointment will change from tentative to confirmed. Only a system of rigorous control can prevent scheduling conflicts.

As a tool for others on the campaign staff, post a wall calendar with the key events of each day written in. This wall calendar should be kept away from headquarters drop-ins, but available to the key people of the campaign. That way, the volunteer coordinator can glance at the calendar to see the next time the candidate will be in Poquoson.

Responsibilities of the Driver: Driving, Instant Advance, Calling In, and Staying on Schedule

The first function of the campaign driver is to drive. Candidates shouldn't drive themselves. Tired candidates make mistakes and driving time is wasted time, unless the candidate is on the phone, resting or reading. Also, if someone receives a speeding ticket, it shouldn't be the candidate (bad press). The scheduler gives the driver good maps and directions. Again, the driver should also have access to, and know how to work, a GPS system.

The second function of the driver is instant advance. If there are press people at the campaign event, the driver gives them the press release. While the candidate shakes hands at a picnic, the driver puts material at every place. If the candidate speaks, the driver tapes a placard on the lectern and puts up posters on either side. If the candidate picks up checks or volunteer cards, the driver needs to get them and bring them to the headquarters.

The driver also has the responsibility to make a *report to the scheduler at the end of*

every day: places where the estimated drive time was wrong, places where the crowd didn't show, events that went better than expected. Otherwise, the scheduler will never know what to change or how to improve.

The driver should call in to the headquarters at fixed times for messages. Standard times are 10:00 a.m., 2:00 p.m., and 4:00 p.m. If the editor of the paper or president of the bank wants to see the candidate that afternoon, the candidate needs to know. Cell phones and text messages make your driver's life much easier, but only if they pay attention to them.

Finally, working with the daily schedule, *the driver needs to keep the candidate on time.* Some candidates need to be nudged when lunchtime is over. Others need to be pushed to leave the picnic with 400 enthusiastic supporters to go to the candidate forum that night. Candidates must concentrate on the people; the driver must concentrate on time.

In very crowded situations (these will be rare, but important) the driver should remind the candidate in a respectful but public fashion that it's time to go. That way the candidate can say, "I'd love to stay folks, but you can see I'm being reminded about the next event on my schedule."

Nothing annoys a candidate more than knowing it's time to leave and not being able to locate the driver!

The Candidate and Scheduling

As your campaign gains steam, the candidate will be approached by more and more people to attend various events. There is only one good response that the candidate can make:

"That sounds wonderful, but I don't keep my own schedule. Here is my scheduler's business card. Please call and see if we can work it out."

Conclusion

Seeing that the candidate is in the right place at the right time may be the most exacting job in the campaign. It requires lots of different skills, including tact, the ability to say "no", attention to detail, imagination, accuracy, understanding of geography, contacts, and determination. The person who can do this job well has a great deal to be proud of.

The Campaign Headquarters

Just as a first impression is very important in job interviews, so is the first impression in the life of a political campaign. People judge campaigns – and candidates – by the quality of their headquarters. The campaign headquarters must seem to be a place where people know what they're doing (even when they may not)! If the headquarters looks disorganized or campaign staff looks discouraged, volunteers just won't come back.

Why Have a Campaign Headquarters?

Every campaign needs a place to call home. A very small campaign may make the campaign headquarters the candidate's kitchen or a spare room in someone's home. Larger campaigns will need more space. But no matter what size the campaign, the campaign headquarters should serve several important functions:

1. *The headquarters is the central switching point for information.* Information flows in and out of the headquarters. When a message must be left for the candidate, or a volunteer wants to talk to the campaign manager, the headquarters is the logical place for this to happen.
2. *The headquarters is where people can find the campaign.* Candidates spend most of their time campaigning, which means they're traveling. The campaign headquarters supplies your campaign with a fixed place. The media, your volunteers and donors can find the campaign and conduct their business.
3. *The headquarters is a repository of supplies and information.* Volunteers and campaign workers need a place to store materials as well as pick them up. Most candidates lack the space to store 10,000 brochures or 2,000-yard signs.
4. *The headquarters is the place where campaign work gets done.* Much political work simply can't be done at home or must be undertaken by many volunteers working together. A campaign headquarters provides a central location for work.
5. *The headquarters is the focal point for the campaign.* It's the one place on earth where the campaign is everyone's number one priority.

Keep in mind: Not every campaign needs a formal campaign headquarters, and many campaigns can't afford one. Additionally, a campaign headquarters isn't free. Even if the space is donated (check state and local election law), utilities and phones still must be paid for. It's important to know that when a headquarters is opened, the operating cost

of any campaign increases. FEC (Federal Election Commission) law is strict when dealing with donated space – so please review. Space must be rented at fair market value. The important thing to remember is that a campaign headquarters is not an end in itself – the headquarters helps the campaign accomplish its goals.

What to Look for in a Campaign Headquarters:

Resources and funding will restrict the choices you have in establishing a headquarters. Every headquarters is different, and the size, shape and expense must fit the campaign. Nonetheless, every campaign headquarters should fulfill the following specifications:

1. *Be easy to find.* It doesn't do any good to recruit volunteers if they can't find the headquarters.
2. *Offer good, well-lit parking.* If your volunteers can't find a place to park, or if they're afraid to visit your headquarters after dark, your campaign will suffer.
3. *Have comfortable heating and air-conditioning.* There's no virtue in freezing or sweating, and if your volunteers find the headquarters an uncomfortable place to work, they may not come back.
4. *Have clean restrooms.* If a volunteer would rather drive home than use your restrooms, your volunteers may not come back. Make sure someone is responsible for the cleaning details – tissue, soap, paper towels and other amenities must be provided.
5. *Have a large space for big volunteer projects.* Stuffing a large mailing takes space, as does constructing yard signs. Working together in one place on a project is more fun.
6. *Include small offices.* Most campaigns will need rooms where the door can be shut for meetings, research, writing, handling personal matters, management functions and media relations. Too often campaigns rent storefront space only to find that it's impossible to get any work done because of the noise.
7. *Provide refreshments and have a refreshment room.* Supplying your volunteers with something to eat and drink is the least you can do. (Remember, armies march on their stomachs!)
8. *Cell phones/telephones.* In years past, campaigns had to install multiple phones at great expense. Now nearly everyone has his or her own cell – however, you may wish to consider still installing at least one or two landlines. Also, remember to have extra cell, laptop and tablet chargers in case volunteers forget to bring their own.
9. *Make sure the headquarters is well equipped.* Provide a copy machine, tables and chairs and office supplies. Provide guest Wi-Fi (and change your

password often for security.) You want to make volunteering for your candidate as easy as possible.

10. *Be family friendly.* The campaign headquarters should be a good place to bring children. Many campaigns have a play area, complete with a DVD player, to entertain children. A responsible high school student can be recruited to babysit while mom and dad are volunteering on your race.

Closing the Headquarters

Before closing the doors for the last time, remember that other campaigns will follow. Every election year, campaigns are forced to spend money to collect the same information that the last campaign threw away. To save other campaigns from reinventing the wheel you've labored so long to build, take time to save important files and materials.

Additionally, make sure your campaign doesn't leave unpaid bills for someone else to pay. That's why the phone company and other vendors no longer offer credit to campaigns – they've been burned too many times. Good faith, even in the aftermath of a painful defeat, is a valued commodity.

Here's a checklist of suggested actions for closing down your campaign headquarters:

1. *Organize and store your files.* Your records will be helpful in future campaigns – lists of volunteers, yard sign locations, etc., are invaluable.
2. *Pay all the bills.* A bad credit record will hurt the next candidate – and most certainly will damage your candidate's reputation.
3. *Shut off utilities.* Too often campaigns forget about this until a huge bill arrives at the candidate's door; arrange in advance to have utilities turned off after the election.
4. *Get deposits refunded.* Be sure to keep all receipts to ensure you receive you refunded deposits.
5. *Clean the headquarters.* A little effort goes a long way towards better community relations – and maybe fewer deductions from a security deposit.
6. *Return keys and borrowed items.* Most campaigns stock their headquarters with all kinds of borrowed items – be sure everything is returned in good shape
7. *Leave a forwarding address and phone number.* Notify the post office and landlord. You don't want to miss any late contributions.

Recruiting Volunteers

Webster's Dictionary defines a volunteer as "one who enters into or offers himself for any service of his own free will."

In a political campaign a volunteer is someone who will help your campaign without being paid. That means volunteers are treasures, jewels without price. They should be treated as such.

Most political campaigns in America today are dominated by television advertising. In those campaigns, fundraising has to be a dominant part of the campaign. But the vast majority of campaigns for down ticket offices in America are fundamentally different. In those campaigns, TV is a marginal factor. In those campaigns, word of mouth, neighbor-to-neighbor activity, the smile and the handshake are more important.

In local campaigns the recruitment and use of volunteers is the key to victory. It's easy to pay lip service to the idea of running a volunteer campaign. Many candidates claim they're going to run "a grassroots campaign." In the end, however, all too many campaigns suffer from the lack of a solid volunteer force. Why? Because recruiting volunteers is tough, hard work.

In this section, we'll help you find, recruit and maintain volunteers.

Wanted: Great Volunteers

People volunteer to work in campaigns for all kinds of reasons. So it's worth your time to understand the motivation of your potential volunteers. Here are some reasons why people volunteer on campaigns:

They care deeply about a specific issue or cause, and this commitment is deep enough to drive them to work in a campaign. Think about the issue positions of your candidate and determine what groups care passionately about those issues—recruit your volunteers among these groups.

In a recent election in Mississippi a candidate enjoyed the luxury of phone bank volunteers from both a motorcycle club AND the Family Foundation. The issues that brought these unlikely groups together: mandatory helmet legislation (the candidate opposed it) and abortion (the candidate was pro-life.)

They are passionate about a certain candidate or cause. Your candidate or organizer should ask their friends and relatives to help with the campaign. A recent

candidate in Virginia was very active in the Knights of Columbus, and was able to enlist large numbers of members in his campaign as donors and volunteers.

They are lonely or bored and want something constructive to do to fill up their time. Some, but not all, retired folks, college students home for the summer and unemployed people fit this description. In a campaign in San Antonio, Texas, one volunteer coordinator recruited retired military officers. These folks tackled volunteer projects with the preciseness of the invasion of Normandy!

They seek excitement. Some people find politics exciting and crave the adrenaline rush of a hard-fought political campaign.

The Volunteer Coordinator: Part Drill Sergeant, Part Cheerleader, Part Girl Scout Leader.

If you want more volunteers, recruit a volunteer coordinator. A volunteer coordinator must be organized, efficient, patient and dependable. The coordinator establishes a calendar of events, which require assistance by volunteers. While the coordinator need not be directly responsible for each project, this person must oversee the work of the volunteers and know every detail that needs to be accomplished.

The volunteer coordinator helps find, recruit, supervise and follow up with each volunteer, and makes each one feel welcome, useful, needed and appreciated.

Where to Find Potential Volunteers

The first step in recruiting volunteers is to make a list of places you'll find volunteers. Your candidate's base of support is the first place you should look for volunteers. That base includes:

- Personal friends
- Rolodex of business associates and contacts
- Members of the candidate's church
- Christmas card/holiday greetings list
- High school or college alumni
- Members of professional organizations
- Digital outreach through social media & e-mail (Facebook, LinkedIn, etc.)

A note about digital outreach: Social media and digital recruitment can be a great way to reach a large volume of people quickly that could be potential volunteers. While this is useful, it should not substitute for personal outreach and follow up. People will be

more likely to volunteer if they are asked directly on a personal basis.

In addition, you can also recruit volunteers among:

- High school government classes
- Homeschoolers (assuming your candidate is supportive)
- College students looking for an internship
- Campaign website
- Service clubs: Rotary, Lions, Kiwanis, Jaycees, Business & Professional Women's club
- Veterans organizations: American Legion, VFW
- Fraternal organizations: Moose, Elks, Masons, Knights of Columbus
- Friends who may live out of town but may be willing to help raise funds or volunteer on weekends
- Senior citizen groups

Signing Them Up

The second step in building a volunteer work force is to actually *ask people to help*.

It may sound simplistic, but this important step is often neglected. A 2008 Stanford University study revealed that most potential volunteers are overlooked because they were never asked.

Experienced volunteers will expect you to give them the honor of asking for their help. They know the value of their labor, and expect you to know it, too. And because other campaigns are competing for the same services, the campaign that asks first usually gets the most volunteers.

Volunteer jobs include:

Telephoning voters
Looking up phone numbers
Data entry
Working at headquarters
Organizing parties & events
Building/distributing yard signs
Babysitting
Fundraising
Addressing envelopes

Clipping newspaper articles
Website development
Writing press releases
Door-to-door canvassing
Writing postcards to friends
Driving voters to the polls
Answering the phone
Even taking out the trash

Here are some proven methods to recruit volunteers:

The sign-up sheet. Pass around a sign-up sheet at association meetings and ask people to sign up. Once people put their signatures on paper, they'll feel committed to actually show up and help.

The volunteer card. Many campaigns print up cards and ask every volunteer to fill one out. The candidate and staff should carry the cards everywhere they go and pass them out.

Use your website to recruit volunteers. The landing page of your website should ask people to volunteer and make it easy for them to sign up to do so.

Social Media. Likewise, any social media (Face book, Twitter, etc.,) should also provide a means for people who like what they read to join the campaign.

Ask people to volunteer for specific tasks or duties. Find out what your volunteers feel comfortable doing in your campaign. For example, if a volunteer says she'll do anything BUT make phone calls, don't ask her to. Asking a volunteer to sign up for a specific duty gives her some control over the extent of her commitment.

Follow-up with a postcard, letter or e-mail message. Once the volunteer has signed up she deserves an immediate response from the candidate or organizer thanking them for their commitment. If the volunteer signed up for a specific task, the letter can also serve as a reminder notice.

Keep accurate volunteer records. The volunteer coordinator needs to develop a system for tracking volunteers so that you can mobilize them quickly for future projects. Make sure you get name, address, work, home and cell phones and e-mail addresses.

Over-recruit volunteers for telephones or projects that require a specific number of workers. That way one worker's absence won't delay the team effort of others.

Keeping Your Volunteers

Always remember that volunteers are *volunteers*. Since they're not paid and are free to leave at any time, you need to reward them through other methods. So be flexible, keep the work fun, straightforward, exciting and challenging. Here are a few suggestions:

Remember to say "thanks". Saying "thanks" is a neglected form of compensation. Someone (the campaign manager, the volunteer coordinator, the candidate) should thank volunteers every day.

Write "thank-you" notes. Written thank-you notes to your volunteers should be sent during the campaign as well as after the campaign is over.

Honor the "volunteer of the week". Your campaign should have a spot in the headquarters where you put the photograph of the volunteer of the week. A certificate should accompany this award (easily produced on a laser printer.)

Feed them. Make sure the headquarters has free coffee, soft drinks and snacks. If you expect people to work through a meal, send out for pizza. Feeding them shows that you care.

Give them nametags. Volunteers should have nametags. Regular volunteers should have permanent nametags. Nametags help them remember each other's names, allowing them to work better together as a team. This can also help with retention of volunteers because it generates familiarity.

Involve your volunteers in the life of the campaign. Your volunteers deserve to know what's going on with the campaign. Publish a volunteer newsletter and send out weekly e-mail updates. Invite the volunteers in to screen the new TV ads. Remember, it's their campaign too.

Hold staff parties and include your volunteers. Have a barbeque the evening of your major door- to-door blitz or coordinate a primary election night party.

Insure that the paid staff helps out occasionally with volunteer projects. Your staff needs to pitch in with the volunteers on big projects. It will make the staff more aware of just what they're asking of the volunteers, and it will prove to the volunteers that their tasks are important.

Give out titles. Volunteers should receive titles and job descriptions to go with those titles. These titles and job descriptions will make people feel good about themselves and will reinforce the importance of the tasks they are accomplishing.

Make the workspace as nice as you can. It may not be possible for your campaign to afford a nice office space (few campaigns can), but there's no reason why the campaign office can't be clean and well lighted. Do what you can to insure that the surroundings are pleasant for volunteers and they'll respond by returning to work

more often. Retention is the key to success and a clean/organized office is a great way to encourage volunteers to return.

Maintain a sense of humor. As the campaign proceeds, the atmosphere may become hectic and tense, and plans may go astray. Remain calm and steady.

Don't criticize the help. Volunteers screw up things as often as anyone else. Don't be critical. Remember, the volunteer doesn't have to put up with abuse. Correct the problem and teach the volunteer how to do it right next time.

Your volunteer coordinator can also follow these suggestions for the "care and feeding" of volunteers:

Always have work for your volunteers to do. Never get in a situation where you have to tell your volunteers that there's nothing for them to do today.

Have precise job descriptions. It probably doesn't matter strategically whether you have your yard sign blitz on October 9th or October 15th. But it does matter to your yard sign chairman because that's the day he needs to plan for. Have key dates scheduled in your campaign; you want to tell people exactly what's expected of them and when.

Recruit for specific tasks. Do *not* say, "Come in to the headquarters when you have a chance." Instead say, "Which evenings are you free? Can you come in Tuesday for two hours from 6:00 to 8:00 p.m.?" People tend to do what's expected of them.

Build success and celebration into work assignments. Don't let your volunteers get discouraged or exhausted. Break big projects into smaller ones and mark the completion of each with a celebration of success.

Spend time on training. Each time you start a new project, get your volunteers together and talk about what you're trying to accomplish. Show them shortcuts that you've learned during your years as a volunteer. Training improves effectiveness and productivity. It also ensures that mistakes aren't made that need to be corrected by a paid staffer or another volunteer.

Encourage questions. Establish an atmosphere where your volunteers feel free to ask about things they don't understand and to question things that may not make sense. Spending time explaining things again is much better than having to do them over. And your volunteers might even suggest a more efficient way to get something done.

Targeting

Targeting is an effective tool you can employ to prioritize the use of your campaign resources. The process of precinct targeting is particularly important in states in which registration by party, or enrollment, is not required.

Whether you have the ability to target individual voters on the basis of party registration or not, precinct targeting should be part of your planning for voter identification programs, registration drives, advocacy programs, get-out-the-vote drives, and vote goals.

Available in hard copy or on the Internet from your county clerk, local government election division or Secretary of State's office, precinct-by-precinct voting returns and registration data are easy to find.

Also, your state party organization or legislative caucus should be able to assist you in collecting the needed information.

Note: The examples below can be applied to candidates of either party. These examples are for a hypothetical Republican campaign. The same technique is used in Democratic campaigns.

First, you must collect the following election data:

1. **Voter registration figures.** Obtain the most current figures as well as those for previous years (get the closing figures before each election for consistency).
2. **Election returns by precinct from a number of previous election years.** Obtain returns from primaries and general elections for local, federal and statewide elections.

Second, before you begin, make certain you note any boundary changes from your precinct maps and information from the election office so that you do not make the mistake of comparing OLD precinct 012 with the NEW precinct 012. You may need to add precinct returns together to achieve areas comparable in geography.

Formulas for Targeting Precincts

First, establish the combination of votes needed to guarantee victory. Your candidate has to garner 50 percent of the votes plus 1 to win. However, because close elections can be stolen or lost by accident, shoot for 52 percent of the estimated vote. This will guarantee a win and give you a cushion if your vote estimate is wrong.

There are basically two methods of targeting precincts—by Republican performance and by persuadability. Republican performance is simply a measurement of how Republican-oriented voters of a precinct are. Persuadability is a measurement of how willing the people in a precinct are to split their tickets or swing their vote from one party to another.

A ticket splitter is a voter who casts votes for both Democrats and Republicans in the same election year. Swing voters change their affiliation from one election year to another.

These persuadable voters contrast sharply with the straight-ticket voter who "pulls the party lever" or casts all his votes in an election for candidates of the same party. Since ticket splitters and swing voters are usually the deciding factors in most elections, it is imperative to identify areas with high persuadable potential.

Follow these steps to prioritize the precincts in your district:

Step #1: Estimate voter turnout.

There are basically two easy methods of doing this.

Estimate the turnout percentage of the registered vote and multiply that percentage by the number of registered voters.

To do this, first find out what percentage of the vote turned out in the last similar election. For instance, to find out turnout in 2000 (a presidential year), check to see what the turnout percentage was in 1996 (another presidential year).

Then find out how many voters are registered in your area. Multiply the turnout percentage for 2012 by the number of registered voters in your area in 2016, and voila, you have your estimate.

Example:

5,000 people out of 10,000 registered voters voted in 2012.

$10,000/5,000 = 50$ percent turnout

12,000 people are /now registered to vote $50\% \times 12,000 = 6,000$

6,000 people will vote in 2016 -EASY!

Sometimes the voter registration numbers are unusable for the process above because of voter registration purges or uncooperative registrars. Then you must determine voter turnout by assessing the historical data.

If you can detect the patterns of growth or decline in voting, you can make estimates based upon the assumption that these trends will continue.

Find out how many people voted in the last three or four elections for example:

2010 - 2,500

2012 - 2,900

2014 - 2,600

Since you know that 100 more people voted in 2014 than voted in 2010, you can guess that 100 more people will vote in 2016 than voted in 2012. Remember, Presidential and non-presidential years have different turnout percentages, and should never be averaged.

There are a number of other ways to determine voter turnout using voter history. Another easy way is to assume that the difference in turnout between 2010 and 2012 will also occur between 2014 and 2016.

Thus:

$2012 (2,900) - 2010 (2,500) = 400$

$2014 (2,600) + 400 = 3,000$ for 2016

You can easily do the same formulations using percentages. Take the percentage difference between 2010 and 2012 and apply the same percentage difference between 2014 and 2016.

Step #2: Select a base race.

This race is usually a statewide or district-wide losing race in which the candidate received no more than the base or minimum party vote. This race should not be one that attracted a great deal of controversy or in which personality was too big a factor. For best results, and if you have the time, find several "base" races and average them together.

Step # 3: Select a high race.

For example, a high race is the best vote performance by a candidate. It should reflect the best effort in attracting Independent and Democrat votes by a Republican candidate or vice versa.

Try to select a high race and a base race from the same year. If for some reason this is not possible, use both from either a non-presidential year or from an off-year election. If you have to, you can use percentages from an on-year figure with an off-year statistic though it is best to avoid that if possible.

Again, many experts feel it better to use a number of races to find your "best" race average.

Step #4: Select an average winning race.

Find a race the GOP candidate barely won. If you can't find one, find a race that the GOP candidate barely lost; any kind of close race will do.

Step #5: Average the three races you found in Steps 2, 3 & 4.

Find the percentage of the vote the Republican received in each of the three races. Then take the three GOP percentages, add them together and divide by three (amazingly simple). That will give you the average GOP performance for each precinct.

As noted before, the more races you can use in your averages, the better the results.

The next step is to rank the precincts from best to worst or highest average GOP percentage to lowest. If you are targeting by GOP performance, most of your work is over. Work the best precincts and ignore the worst. Your resource limitations will tell you where to put the dividing line between high-priority precincts and low-priority precincts.

Step # 6: Calculate persuadable voters.

For each precinct, subtract the GOP percentage in the base race from the percentage in the high race. The difference is the percent of potential swing or persuadable voters per precinct. This same calculation can also be done for Democratic campaigns.

Step #7: Rank the precincts persuadable potential.

Sort or rank all precincts by swing vote percentage from highest to lowest. This tells you which precincts contain high numbers of persuadable voters.

With these rankings, you'll be able to allocate key resources to:

- Partisan precincts (of your party): to solidify your base.
- High swing voter precincts: to move persuadable voters to vote for your candidate.

- Opposing party precincts: that you might as well write off hopeless.

Identification programs

An efficient I.D. program would canvas Republican and ticket-splitter precincts first.

Registration drives

Top Republican precincts would be fertile ground for registering new voters.

Advocacy programs

Depending upon your strategy, heavy GOP precincts or high ticket-splitter precincts would be targeted for advocacy programs for your candidate.

G.O.T.V.

Your turnout operation should work to turn out identified supporters on Election Day. If you haven't been able to complete your calling, you might want to "blanket" turnout core Republican precincts on Election Day. If the precinct is an average 70 percent GOP precinct, blind calls will turn out some Democrats, but the odds are that 70 percent of the calls will be to GOP households.

A Final Bit of Help

Confused or lost? Don't feel bad; not everyone is good at math and many people are downright scared of it. At the end of this chapter you can find an appendix containing voter history targeting made simple with attached Excel formulas for the "math challenged". If you are still recovering from Mrs. Pace's 4th period Algebra Class, find some young person, give them the appendix, and let them do the math for you.

Opposition and Issue Research

The aim of research in war or politics hasn't changed since around 400 B.C. when Sun Tsu, a famous Chinese general, wrote:

*"Know your enemy; know yourself and you need not fear a hundred battles."
- Sun Tsu, the Art of War*

To prepare for a political campaign, or a battle, the best generals (and campaign managers) know everything they can about their opponents. Just as importantly, they're

brutally honest with themselves—they make accurate assessments of their own abilities and the strengths and weaknesses of their troops (or candidates). Finally, they learn everything they can about the terrain (the district) on which they'll be fighting.

Good research won't necessarily guarantee victory for your campaign, but it will improve your chances. More campaigns have been won in the library than have been won on the TV.

Research

Research should be an important part of every campaign. It's the foundation of knowledge and information from which the campaign plans and builds.

With a good knowledge and understanding of the district, its voters, and the issues that will or should be addressed during the campaign, the candidate is in a better position to develop and execute a winning strategy for Election Day. In addition, good research allows a campaign to allocate its four major resources—time, money, people and talent—more effectively.

Research should be conducted from the very beginning of a campaign. Actually, it should be started before the candidate even announces and the campaign begins. Preliminary research is necessary to develop the campaign strategy and plan. In addition, this research gets the campaign off to a solid start by providing data for the early stages of fundraising, targeting, scheduling, press releases, internet communication and speeches.

Research must be updated throughout the campaign. It's vital to the entire effort to be current on facts and figures, the issues, the opponent and the perceptions of the voters. The research should be available to all those working on the campaign. Don't let it sit on a shelf to collect dust!

Information is important to not only the candidate, campaign manager, and steering committee, but to those staffers and volunteers who will be raising funds, writing speeches and press releases, and directing special activities such as door-to-door campaigning, digital advertising, website development or phone banks. Research will allow these campaign workers to plan and execute their specific duties and responsibilities more efficiently.

Setting Up a Research Operation

First of all, put someone in charge of campaign research. In many campaigns, the task of conducting opposition research is given to bright college students. In other campaigns, the meanest person gets the job. In the best of all possible worlds, the well-

funded campaign will hire a professional researcher who has researched other candidates; someone who understands the players and the dance of legislation at the local, state and federal level; someone who is both wise and fair; someone who will get inside your opponent's way of thinking to find the weaknesses.

Since most small campaigns can't afford this kind of talent, try to find someone who is good with detail and understands something about public policy. The important thing is that a person is given the responsibility of getting the work done. Candidates and campaign managers who attempt to conduct research themselves invariably don't get the job done.

A research program is an excellent way to get people involved and working in the campaign. There will be much information to collect and prepare.

The job will be easier to complete with several people working together. One doesn't need to be an intellectual wizard to do research. A researcher only needs to be a hard worker with an eye for detail and a commitment to accuracy.

With just a little effort, you'll find all kinds of qualified people. They can be assigned to various research tasks such as collecting statistics, election returns, preparing issue briefs or analyzing the candidate's records.

Remember that research is one of the most important parts of a campaign and let your volunteers know that without it, victory will be elusive.

Most of all, it's important for the research to be accurate. All facts and figures should be checked and double-checked. There's nothing worse, or more embarrassing, for a candidate than to use inaccurate information. Credibility will be lost for both the candidate and the campaign.

What You Ought to Research

A well-rounded campaign research program includes research in five specific areas. All campaigns, from the county council to the President, should conduct research in the first four areas. The fifth, survey research, or polling, may be too costly for smaller campaigns, but if it's possible, it will be an asset to decision making in the campaign.

Demographics

Imagine having the task of developing a strategy or writing a plan for a campaign in a district you know nothing about. Without some basic knowledge of the district and its voters (how many voters live there, what are the major occupations, how many radio

stations and newspapers serve the area, etc.) developing a realistic strategy and plan would be difficult.

Demographic research is the process of compiling this basic information. It's collecting facts, figures, and various statistical information about the district and the people who live there. A good package of demographic research, called a district profile, includes the following types of information:

Geographic:

- The number of precincts, wards, counties and cities in the district
- Maps of the district showing precincts, wards and counties (and if possible, streets and roads)

Statistical data on the voters:

- Age
- Education
- Income
- Religion
- Ethnicity
- Homeowners/renters
- Families/singles
- Number of registered voters and voting-age population
- Number of newly registered voters and areas of the district into which they've moved

Occupation:

- Employment rate/number of persons working
- Major occupations
- Major businesses, corporations and industries in the district
- Number of new businesses
- Number of small businesses
- Number of educational institutions

Special voter group lists:

- Veterans, union members
- Doctors, lawyers, business people, etc.
- Women's clubs, garden clubs, hobby-oriented clubs
- Soroptimists, Business and Professional Women, Lions, Kiwanis, Rotary, Jaycees, PTA, Chambers of Commerce, etc.

Party organization:

- Volunteers—Party and campaign
- Contributors—Party and campaign
- Precinct committee members
- Name and addresses of all party leaders
- Central/county committee members
- Party's Women's Clubs
- Auxiliary organizations such as Young Republicans, College Democrats

Scheduling:

- State and county fair dates
- July 4th, Memorial Day, Labor Day planned activities
- Special events in the area ("Hometown Day")
- Regularly scheduled meetings of organizations

Media:

- Newspapers, radio and television stations serving the district
- Advertising rates for purchasing campaign newspaper ads, radio and television spots
- Important political blogs
- List of reporters and editors who cover campaigns

This is by no means a total list of possible information for your district. It must include basic data that should be gathered in the early stages of a campaign. Remember: the more knowledge a campaign has, the better the strategy and plan.

Vote history

Just as it's important to know *who* lives in the district, it's also very important to *how* they've voted in past elections. Having this knowledge will give you an indication of how they'll vote in upcoming elections.

Vote history, the second area of a research program, is the collection and analysis of registration figures and election returns to determine how the voters in a district behave politically. Current registration figures provide the number of voters who can vote in the election. In some states, voters register by party, thus allowing us to determine the actual number of self-identified Republican, Democrat, and Independent voters in the district. In states which don't register by party, collecting election returns from primary

racers will give us a fairly good idea of the number of people who tend to vote Republican and Democrat in the district.

Voting-age population is the total number of people in the district who are 18 years and older and thus eligible to vote. If you know the voting-age population of the district, you can compare this figure to the number of people actually registered to vote.

Election returns show us how the district has voted in past races. They indicate what percentage of voters are "straight ticket voters," i.e., the percentage of voters who always vote for all Republican or all Democrat candidates. They'll also show the percentage of voters who tend to "split their tickets" in elections, i.e. those voters who vote for candidates for just one party, either within the same election year or from year to year. Although we can't determine exactly who these voters are (names and addresses), we can determine which precincts tend to have more straight ticket voters or ticket splitters. The process of determining these types of precincts is called "targeting", and it's discussed earlier in this manual.

The campaign should collect election returns from the last several races for President, U.S. Senator, U.S. Congress, Governor, State Senate, and State House. If you are working on a county or city race, the campaign should collect returns from these races also.

It's best to collect these returns by precinct as well as by county. The smaller the voter unit you work with, the more thorough and accurate job of targeting you'll be able to conduct.

Issues

Many different subjects, or issues, will arise during a campaign. Your opponent will advance some issues; some will trickle down from a higher profile race; some will be created by forces outside your control; some will be invented by the media; some will be formulated by your candidate.

Some of these issues will be of major concern to the voters. Others will be of lesser importance and may only be referred to once or for a very short time.

A successful political campaign must be aware of those issues with which the voters are most concerned and interested. These are usually the most important issues in a campaign. Voters will be more interested in a candidate who discusses the issues that concern them.

Issues research is the process of determining the most important issues and then collecting the facts and figures, so you can discuss these issues in an intelligent manner. Voters don't determine their choice for candidates solely on the issues addressed during the campaign; Party affiliation and candidate personality also play major roles in voter decision-making. By and large, though, discussion of issues is the focal point of a campaign.

During the campaign, a candidate projects images to the voters of what kind of elected official they will be. Leadership, independence, caring, experience, knowledge and judgment can be relayed to the voters by the way the candidate handles issues. Negative images, such as inexperience, ineffectiveness, lack of knowledge, or lack of judgment can also be projected. For a candidate to project a positive, winning image to the voters, it's important that she knows which are the most important issues and be well versed in them.

How to Find the Right Issues

There are several ways to figure out what issues are important to the voters. First, look for those issues that appear to be "obvious subjects of concern." These issues tend to be ones that are ongoing problems and impact voters' lives on a daily basis.

For example, taxes are usually an important issue to voters. It's an ongoing concern and one that impacts virtually every voter's life.

Talk with the candidate or individuals who were involved in the last campaign and discuss the issues that were addressed. Some of these issues may still be of concern during this campaign. Study the previous campaign's issue stances and voter reaction.

Monitor the newspapers and radio and television stations in your area. A story that appears in the news day after day, particularly a local story, has the potential of becoming a major issue in the campaign.

Remember, however, that not every news story will be a campaign issue.

In addition, check out the "Letter to the Editor" section of the paper. Subjects that tend to appear on a rather frequent basis may give you an idea of an issue that is important to voters or a particular group of voters.

Survey research, or polling, is an excellent method of determining important issues or measuring voter intensity on specific issues. Open-ended questions ("What do you think is the most important problem facing our town today?") or close-ended questions ("Of the following issues, which concerns you and your family most?") are used to search for issues that should be addressed by the candidate and the campaign.

Polls are great, but like many great things, they cost a lot of money. A 300 sample survey conducted by a professional polling firm for a Congressional district race can cost as much as \$18-22,000. A short poll for a state house race will still be in the 5-digit range. Statewide surveys cost even more.

If the campaign can't afford polling, try using what survey research might already be available. Political science classes in colleges and universities often conduct studies to ascertain important problems in an area or to study voter sentiment on current issues. Local governments or organizations, such as the Chamber of Commerce, conduct these types of studies as well. Newspapers, radio and television stations also run polling data from major polling firms, or may conduct their own polls on local issues, especially around election time.

Focus groups, although not a totally scientific method of collecting data, can be a valuable source of information on issues and perceptions if they are conducted properly. A focus group is a discussion group made up of approximately a dozen people led by an impartial moderator. The participants are selected to reflect as closely as possible the demographic makeup of the district. This selection process allows for a wide range of views and opinions.

A moderator leads the discussion, asking questions on various subjects. They can be about issues in general ("What do you think are the most important problems facing our area of the state today?") to questions on more specific subjects ("Do you think we should cut government spending or raise our state income tax to meet budget targets?") The moderator must be careful not to bias the questions or "lead" the participants to give certain answers. The goal is to obtain objective and useful information for the campaign.

Focus groups are good at learning about how people feel about issues and leaders in their community. Like any research conducted by a professional firm, you are going to have pay for their expertise. A focus group can cost anywhere from \$2-\$5,000, and you usually have to pay for several to get any kind of accurate depiction of voters.

Perhaps the best way to discover what's on the voters' minds is to talk with them about issues and problems. Find out firsthand what really concerns them! Whether it's a one-on-one conversation with the voter, participating in a meeting with voters, campaigning door to door in a neighborhood or visiting the local coffee shop on a Saturday morning, direct voter communication is one of the best methods of determining the most important issues to address during the campaign. The more a particular problem or concern is mentioned, the more likely it is to be an important issue to a large number of voters.

Preparing an Issue Brief

Once the most important issues have been determined, the campaign needs to collect the facts and figures on those issues so the candidate can discuss them knowledgeably. A summary of the data, called an issue briefing, should be compiled for each important issue (don't try to do them all).

Find out through trial and error what your candidate needs. Some candidates like to read through reams of paper and synthesize the data in their minds. Others want a one-pager that contains the talking points they will need in talking to reporters. In all cases, the brief should be long enough to cover all the pertinent information on the issue, but short enough to not bog the reader down in unnecessary detail.

Here's what to include in the issue brief:

1. *A short discussion of the issue itself.* Explain why it's an important issue and merits attention in the campaign. Why are a large number of people concerned about the subject?
2. *A summary of all the facts, figures and other statistical information about the issue.* For example, if the issue brief is about unemployment, the number of unemployed persons and the number of businesses and industries affected are types of data to be included in this section.
3. *A summary of the "sides" of the issue.* This is a short discussion of the "pro" and "con" arguments on the subject. It should be objective, detailing how each side views the issue. This section should also include which individuals and/or organizations have taken a position or might take a stance during the campaign.
4. *Documented statements on the issue made by the candidates in the race.* Include quotes or full statements from each candidate on their stance on the issue. (Don't forget to include your own candidate's view!)

The completed issue brief needs to be concise and clearly written. All facts and figures should be double checked for accuracy. By reading the brief the candidate or other members of the campaign should be able to grasp the basic points of the issue and discuss the subject with the voters.

The good news is that you can find information about anything on the Internet, and numerous facts and figures are at your fingertips. The bad news is that much of what

is on the Internet is wrong, and some is right but not verifiable. Double check anything you find and make sure that anything you write is backed by more than one source.

Your Opposition

Why conduct opposition research? Why does your campaign have to research your opponent? Why can't you talk about your issues and let your opponent talk about theirs and let the best person win?

Politics in America is adversarial in nature—some candidates win, some lose. A vote for one candidate is always a vote against at least one other.

In sports, only foolish coaches fail to study their opponent's game tapes. In any human conflict it is essential to know your opponent's strengths and weaknesses, so that you can formulate a winning strategy.

Why not run a completely positive campaign? People in the advertising business call a positive, issue- oriented campaign for a consumer product a "unique selling point" campaign.

The problem is all candidates are against crime and for a better economy. Your selling point isn't "unique" if the other candidate is selling the same thing. In other words, you need to have areas of differences. Without issue differences, voters may decide to vote for the candidate with the more interesting name, or the candidate who has spent the most money telling them what a great guy he is, or they may vote for your opponent because they voted for him the last time. Issue-less campaigns are bad for the political process because they rob the voters of the ability to make real choices.

Most strategists suggest that voters have to deal with four candidates in each election:

The Republican according to himself	The Democrat as described by the GOP
The Republican as described by the Democrats	The Democrat according to himself

Voters are presented with a choice of candidates in a campaign—a choice of which candidate will be the better person to do the job. The task of the campaign is to present the candidate—his background, his record, issue stances, proposals for the future—as the best person for the job.

An important ingredient of a campaign is a vulnerable opponent, or an opponent who could be vulnerable if the electorate was aware of certain facts. Often times in making the case for the GOP candidate, a campaign must point out the weakness of the Democrat to present a contrast between the two contenders. The campaign must show how the opponent hasn't done, or won't do, a good job in office and that the GOP candidate is the better person for the job or vice versa.

Many candidates feel they suffer from bad press. It's easy to feel mistreated when you attack your opponent for something you know very well he did, but he denies it, and the newspapers jump on you for negative campaigning instead of catching him in his lie.

Good opposition research will give your campaign the tools it needs to expose the record or issue stance of your opponents in believable ways.

Getting Started

Here's an initial list of things you'll want to find out about your opponent.

1. All your opponent's public votes
2. All the bills they've sponsored during their time in office. Most importantly, their stances on major controversies
3. Major public speeches and positions
4. A reasonable analysis of whether they've tried to fulfill their previous campaign promises
5. A factual check on their background
6. Tweets, Facebook posts etc.

Opposition research is the process of collecting information on the candidates—their records, issue statements, proposals—to be able to draw a contrast in the campaign and present a clear choice to the voters. Although it's termed "opposition" research, the record of your candidate should also be researched and analyzed as well. Then you can make a full and objective comparison of the two candidates, comparing your candidate's strengths to the opponent's weaknesses and vice versa.

A complete opposition research study on both candidates includes research in the following areas:

General Background:

- Check the candidate's biography for inaccuracies, exaggerations, and strengths.
- Research the candidate's involvement in community affairs and party politics. Has she been active in these areas?
- What does the candidate do for a living? Are they successful?
- Has the candidate held office before? What is their record?
- Has the candidate won any awards?
- What clubs and organizations does he/she belong to in the area? Does the candidate have support of the organizations?

Issue Positions:

- What are the candidate's positions on the issues?
- Document her quotes and full statements on the controversial issues.
- Research their website.
- Also, their Facebook posts.

Official Record (for incumbents):

- Look at the candidate's voting record. Are there flip-flop votes? Has the candidate voted the way he promised he would during the last campaign? Does he vote the way his constituents would like him to?
- Check out the bills and resolutions they've introduced and cosponsored. Has the legislation addressed issues and problems in the district? Do many of their bills and resolutions pass and become public law?
- Take note of their attendance record. Do they miss a lot of votes?
- Check out their constituent services. Do they send out a newsletter? Hold town meetings? Give speeches? Send press releases to the local media? Visit with voters in their office in the state capitol? Keep in contact with their constituents?
- Research their special interest group ratings. How do special voter groups view their performance in office? Do they vote a majority of the time with a particular special interest?

The Campaign:

- Who sits on their steering committee?
- Whose endorsements have they received?
- What tactics are they using in the campaign - direct mail, door-to-door campaigning, phone banks, radio, and personal appearances?
- Look at the campaign finance reports. Who contributes to the campaign - big donors, out-of- district donors, PACs, well-known voters in your district?
-

Once the data has been collected, take a close look at the two candidates. What are your

candidate's strengths and weaknesses? What are those of your opponent? Compare the two candidates. Can you present a clear choice to the voters? What strengths of your candidate can you emphasize in the campaign? What weaknesses of your candidate should be noted, and if possible, corrected? What are the strengths of your opponent that must be taken into account in your campaign strategy? What weaknesses of your opponent can be used in a campaign attack?

From the analysis of the opposition research, a campaign draws up its defense and attack strategy. This strategy centers on a theme or message which can be backed up by the research data.

For example, perhaps you've found that your opponent, Senator Adequate, has a very poor record in the state senate. His attendance has been about 65 percent; he's voted against the general sentiments of his voters; he's even flip-flopped on important issues; and he hasn't sponsored any bills that deal with the problems in the district.

On the other hand, your candidate, Representative Great, has had a pretty good record in the state house. She has been in attendance 99 percent of the time; has been voting consistently on issues and with her voters' opinions in mind; and has sponsored 33 bills during her four years in the state house which confront specific problems in her district—and ten of those became law. The largest newspaper in the state has named her "Legislator of the Year" for three years.

A specific defense and attack strategy in this example might center on the theme of how hard Representative Great has been working for her district and that she would make a good member of the state senate—a better member than Senator Adequate. From your research, your campaign can point to the successes she has had with her sponsored legislation, contrasting her record to that of Senator Adequate. In addition, the campaign can emphasize her voting record and concern for the voters. The campaign can attack the attendance record of Senator Adequate and criticize several of his "bad" votes. Thus, your campaign can present a clear choice to the voters and a choice that demonstrates that your candidate would be the better person for the job in the state senate.

There's one caution that should be noted about opposition research. Good research isn't "digging dirt." It's the process of collecting factual and documented information about a candidate and his record. It isn't the process of collecting and using rumors and smear information in the campaign. Voters don't respond favorably (usually) to nasty, smear campaigns. These types of campaigns tend to backfire on the candidate who initiated the smear. Voters do, however, respond to an attack campaign in which the candidates' records are compared in a fair and responsible manner—and where accountable data has been used.

Survey Research

Survey research (polling) is great for determining public attitudes, but not much good at discovering the truth. People may believe Senator Snort is a crook, but that doesn't make him one. Likewise, voters may think Cathy Dithers is as American as apple pie, but once they find out that she is a card-carrying member of the Communist Party, they will think otherwise.

It is important to know what people know about your opponent (and you) and how they will react when they learn certain things about both of you. Those are good reasons to pay for survey research. Public attitudes can and do change, so treat the information you learn warily.

Entire manuals have been written about survey research, and this manual doesn't have the space to adequately cover the subject. Survey research is best conducted by professional organizations that know what they're doing. Don't try to cook up some homemade polling and expect it to do the trick.

Where to Find the Information You Need for Your Research Demographic Information

Go to the website for the U.S. Census Bureau for population statistics by county for your state or district. Try your state government's Office of State Planning and Departments of Labor and Commerce, usually located in the state capital. City halls and county government offices will also have demographic information and maps of precincts. Most cities and towns throughout the United States have a local Chamber of Commerce, which can be an excellent source for business and occupational information, as well as for general facts and figures on the area, including scheduling dates. Your state party may also have demographic data.

Voter History

Election returns can be found in the Secretary of State's office in the capital or from the state election board. In most cases, these offices will have election returns by county for all federal and most statewide offices, including the state legislature. They'll also have current voter registration figures by county. For county and city election returns, check with your county's elections office or city hall. Your state or county party may also have voter returns. This information is often available online.

Issue Research

Check websites, the Internet, newspapers, magazines and library reference materials for background information on issues. Contact county and state government offices, state legislative committees or U.S. Departments and Agencies for the most current information. Talk with officials at local businesses or organizations for different points

of view and information.

Opposition Research

Each state legislature records its official proceedings differently. Your state party can inform you how it's done in your state and give you a list of research sources, people and offices to contact for information to make the job easier. Be sure to check websites.

Search the Internet, visit your local newspaper or libraries to look for articles on your opposition or sign up with a local newspaper clipping service.

People who have worked on past campaigns or state or county parties may have old campaign brochures and direct mail from your opponent's past races.

Interest groups such as the NRA, AARP and United Mine Workers are great sources of opposition research. They employ professionals whose job it is to study and understand legislative history and votes, and they usually publish the results of their studies. Which means they do a lot of your opposition research for you. Understand that each of these groups have an axe to grind and will focus on votes that are in their own interests, not necessarily yours or your district's.

Excel Formulas for Precinct Targeting (Appendix)

Rather than bouncing back and forth between the parties, for simplicity's sake we are "crunching" these numbers for a GOP candidate. The math works equally well for Democrats.

Estimate Turnout Vote

Simply multiply the number of registered voters by turnout in a previous similar election in that same precinct. (The formula would be [=B2*C2]).

You can save time by simply copying the formula and then pasting it down the rest of column E. (After copying, highlight the new column and go to Edit > Paste Special > Formulas. In Microsoft Excel 2007, you can just right-click on the highlighted column and find 'Paste Special' from the drop-down menu.)

	A	B	C	D
1	Precinct	2014 Registered Voters	2010 Turnout %	2014 Projected Voter Turnout
2	Wayne	2,175	56%	1,218
3	Macomb	1,754	41%	719
4	Oakland	340	78%	265
5	Graham	983	32%	314
6	Lenoir	537	67%	360
7	Liddy	674	47%	317
8	Hazel	3,757	43%	1,615
9	Dylan	2,834	26%	736

To find out the estimated voter turnout of the entire district, use the sum function on the toolbar at the bottom of that column to total up your estimated turnout. The sum function is equivalent to the formula in D10 [=SUM(D2:D9)]

	A	B	C	D
1	Precinct	2014 Registered Voters	2010 Turnout	2014 Projected Voter Turnout
2	Wayne	2,175	56%	1,218
3	Macomb	1,754	41%	719
4	Oakland	340	78%	265
5	Graham	983	32%	314
6	Lenoir	537	67%	360
7	Liddy	674	47%	317
8	Hazel	3,757	43%	1,615
9	Dylan	2,834	26%	736
Total				5,544

Average Republican Vote (ARP)

To find the average Republican vote add up all three of the previous candidates' vote percentages and then divide that number by three; this will provide you with the average of all three races. The excel formula for this looks like [= (E2+F2+G2)/3]

	A	E	F	G	H
1	Precinct	Smith 2012	Jones 2012	Johnson 2010	ARP
2	Wayne	54%	76%	67%	65.7%
3	Macomb	56%	45%	54%	51.7%
4	Oakland	34%	32%	43%	36.3%
5	Graham	39%	30%	43%	37.3%
6	Lenoir	56%	52%	55%	54.3%
7	Liddy	36%	41%	46%	27.7%
8	Hazel	67%	50%	49%	55.3%
9	Dylan	47%	60%	49%	52%

Base Percentage Vote

The Base Vote is the core Republicans who can be counted on to vote for the Republican candidate. Estimate the base by finding the worst Republican performance for the three candidates in a precinct. Simply use the pre-programmed excel formula **[MIN]**. The excel formula to find the base vote is **[=MIN(E2,F2,G2)]**.

	A	E	F	G	H	I
1	Precinct	Smith 2012	Jones 2012	Johnson 2010	ARP	Base
2	Wayne	54%	76%	67%	65.7%	54%
3	Macomb	56%	45%	54%	51.7%	45%
4	Oakland	34%	32%	43%	36.3%	32%
5	Graham	39%	30%	43%	37.3%	30%
6	Lenoir	56%	52%	55%	54.3%	52%
7	Liddy	36%	41%	46%	27.7%	36%
8	Hazel	67%	50%	49%	55.3%	49%
9	Dylan	47%	60%	49%	52%	47%

High Percentage Vote

This is the maximum Republican vote from a precinct. Find the high vote by finding the best Republican performance for the three candidates in a precinct. To find the high percentage for the three candidates, simply use the pre-programmed excel formula **[MAX]**. The excel formula to find the high vote is **[=MAX(E2,F2,G2)]**.

	A	E	F	G	H	I	J
1	Precinct	Smith 2012	Jones 2012	Johnson 2010	ARP	Base	High
2	Wayne	54%	76%	67%	65.7%	54%	76%
3	Macomb	56%	45%	54%	51.7%	45%	56%
4	Oakland	34%	32%	43%	36.3%	32%	43%
5	Graham	39%	30%	43%	37.3%	30%	43%
6	Lenoir	56%	52%	55%	54.3%	52%	56%
7	Liddy	36%	41%	46%	27.7%	36%	46%
8	Hazel	67%	50%	49%	55.3%	49%	67%
9	Dylan	47%	60%	49%	52%	47%	60%

Persuadability Percentage

This is a measurement of voters in a precinct that are up for grabs. It is the difference between the highest and lowest candidates' vote percentage. The excel formula for this is [=I2-J2].

	A	E	F	G	H	I	J	K
1	Precinct	Smith 2012	Jones 2012	Johnson 2010	ARP	Base	High	Persuadable
2	Wayne	54%	76%	67%	65.7%	54%	76%	22%
3	Macomb	56%	45%	54%	51.7%	45%	56%	11%
4	Oakland	34%	32%	43%	36.3%	32%	43%	11%
5	Graham	39%	30%	43%	37.3%	30%	43%	13%
6	Lenoir	56%	52%	55%	54.3%	52%	56%	4%
7	Liddy	36%	41%	46%	27.7%	36%	46%	10%
8	Hazel	67%	50%	49%	55.3%	49%	67%	18%
9	Dylan	47%	60%	49%	52%	47%	60%	13%

Margins

The margin is the difference between the vote totals of a winning candidate (hopefully of a candidate you wish to emulate) and a losing candidate. The excel formula is [=L2-M2].

	A	L	M	N
1	Precinct	Reed (R)2010	Kennedy (D) 2010	Margins
2	Wayne	568	454	114
3	Macomb	436	143	293
4	Oakland	65	79	-14
5	Graham	241	128	113
6	Lenoir	157	265	-108
7	Liddy	106	73	33
8	Hazel	470	782	-312
9	Dylan	372	403	-31

Percentage Vote Contribution

The percentage a precinct contributes to a candidate's overall vote. Divide the number of votes received in that precinct by the overall vote total. The formula is [=L2/2,415].

	A	L	M	N	O
1	Precinct	Reed (R) 2010	Kennedy (D) 2010	Margins	% Vote Contribution
2	Wayne	568	454	114	23.50%
3	Macomb	436	143	293	18%
4	Oakland	65	79	-14	2.50%
5	Graham	241	128	113	10%
6	Lenoir	157	265	-108	6.50%
7	Liddy	106	73	33	4.50%
8	Hazel	470	782	-312	19.50%
9	Dylan	372	403	-31	15.50%
Total		2,415			100%

Vote Goals

The winning percentage is receiving 52% of the vote. First, calculate the winning number of votes for the district [=D10*.52]. This means you need 2,883 votes to win the election. This number will be divided up among various precincts. Calculate your vote goal for each precinct in the district to achieve 52% of the total vote by multiplying the overall vote goal by that precinct's percentage vote contribution. [=02 x 2,883, =03 x 2,883, =04 x 2,883, etc.]

	A	D	L	M	N	O	P
1	Precinct	2014 Projected Voter Turnout	Reed (R) 2010	Kennedy (D) 2010	Margins	% Vote Contribution	Vote Goal
2	Wayne	1,218	568	454	114	23.5%	678
3	Macomb	719	436	143	293	18%	519
4	Oakland	265	65	79	-14	2.5%	72
5	Graham	314	241	128	113	10%	289
6	Lenoir	360	157	265	-108	6.5%	188
7	Liddy	317	106	73	33	4.5%	130
8	Hazel	1,615	470	782	-312	19.5%	563
9	Dylan	736	372	403	-31	15.5%	447
Total		5,544					2,916

Note: Your total vote goal may end up a little higher than 52% due to rounding, since part of a person cannot vote!

Chapter Two

Voter Contact

Voter contact is a vital function for most campaigns. There are many types of voter contact, and some are covered in the communications section of this manual. Here we will be dealing with the more personal kind of voter contact: list development, canvassing, phone banks, door-to-door activities, voter registration, absentee ballots, literature drops, precinct organization and get-out-the-vote operations (GOTV).

Abraham Lincoln had something to say about voter contact that holds true today. All our modern campaign techniques are just an update of honest Abe's strategy for the elections of 1840.

"Organize the whole state so that every Whig can be brought to the polls... "...Divide the county into small districts and... appoint in each a subcommittee,

"...Make a perfect list of all the voters and... ascertain with certainty for whom they will vote,

"...Keep a constant watch on the doubtful voters and... have them talked to by those in whom they have the most confidence,

"...and on Election Day see that every Whig is brought to the polls."

*- Abraham Lincoln
February 21, 1840*

Lists, Databases, and Software

Before you can begin to call voters in your area, conduct a voter registration drive, or even plan a door-to-door canvass, you will need a list of voters to work with.

That means understanding the role of registered voter lists, voter databases and the software needed to access and manipulate those lists.

There ordinarily four types of lists used by campaigns:

1. **Registered voter lists.** This is the list of people who are registered to vote in your district. The quality of the list varies according to the source and the competence of the local elections or voter registration board.

In some states good, updated registered voter lists are kept by the state party. Call your state party first and see what they have and what they can make available to you. The state party is also the conduit to the national party's database, so call your party's Executive Director or Chair.

Buying registered voter lists from the state board of elections, or the local elections board can be done, but it can also be expensive, and the lists would need to be enhanced. If someone else will do your work for you, by all means, let them. Don't attempt to build your own lists unless you have no other options.

2. **Specialized lists.** These are lists of people (not necessarily voters) grouped into various categories such as profession, religion, occupation, etc. These types of lists are available from a number of commercial firms (Donnelly Marketing, Metro Mail, R.L. Polk, etc.) and can be purchased. While these lists are very valuable for fundraising, they are not of much utility when it comes to voter contact.
3. **Targeted Lists.** In this category, there are lists you can and should procure locally, such as the membership list of the Chamber of Commerce or the local chapter of the Sons of Italy. These lists are invaluable for campaigning and fundraising. The only way you can get them is to ask a member of one of these organizations to get the list for you or buy them.
4. **General lists.** General lists are lists of all residents in a geographic area. City directories, crisscross directories and phone books are good examples of this type. The phone book lists everyone who owns a telephone. Like the phone book, crisscross directories list names and phone numbers, but sort the names by street address. The Cole, Haynes, and Hill companies (to name a few) publish crisscross directories. These directories are somewhat useful in voter contact, but only when they are used in conjunction with the next category of lists.

Prioritize

The first step in any voter contact program is the creation of a universe of voters to be contacted. Unless you enjoy bountiful resources, you will not be able to contact every registered voter in your district. Even if you can contact all of the voters, you will still want to prioritize which precincts or areas you will concentrate on first and what messages go to which groups of voters.

By thoroughly considering which voters you want to reach, and in what order, will save your time, money and manpower.

Selecting a database

Before you can contact the voters you first have to find them. Luckily, you don't have to build your own list of registered voters; someone has done this for you.

Both Party National Committees spend a great deal of money each year to purchase registered voter lists in all 50 states, update those lists and attach information to the record of every voter. The RNC Data Trust and the DNC database Populus give the campaign the ability to sort the voter list for pro-lifers, gun-owners, people who voted for Trump, etc. Likelihood of voting, voting history primary participation and any number of other attributes are also attached to some voter records. Access to the party database is free to candidates as long as the state party signs off on your access. That usually means that if you are in a primary you may not be able to use it.

There are other, commercially available databases available to candidates. Two older firms, Labels and Lists (www.L2Political.com) and Aristotle (<http://aristotle.com>) will sell their products to candidates from either party. Two other well-known firms who deal only with Republicans are i-360 (<http://www.i-360.com>) and Nationbuilder (<http://nationbuilder.com>). The Democrats have their own database firms.

Each of these organizations charges differing amounts for their services. For instance, your campaign would have to pay i-360 for access to their database based upon the number of registered voters in the district, so a candidate in a state house district will pay less than a Congressional campaign, etc.

Almost all database firms today keep their data in the "cloud" and the campaign accesses what they need via the Internet. Most database firms also sell or give the candidate software that you can use to make selects and download lists of voters, etc.

Adding to the Database

You will probably have to add things to the database, such as information on voters your campaign has contacted or noting which people have given money to your campaign. The database's proprietary software should allow you to do this.

Find out how hard it is to enter data into the database by doing it yourself. If you can do it, then your volunteers and staffer can probably do it. If you can't make it work no one else will be able to do it either. Find another database program at that point.

Information on the Voter File

What additional information can almost always find on the voter file?

1. **Address.** Having a good address for each voter allows you to deliver mailings to registered voters. An address also allows you to develop walk lists for your precinct workers. Walk lists are very handy for door-to-door activities. Simply put, each household is listed numerically by street numbers. Households with even numbered street addresses are grouped together and odd numbered households are grouped together. Both even and odd are sequential. So if you send two people to walk door-to-door on Reagan Road, one can take the left side of the street and the other can take the right side. They know that 101, 103, 104 and 105 Reagan Road contain voters, and that 102 and 106 do not. They can either skip 102 and 106, or attempt to register the potential voters who live there.
2. **Precinct Designation.** This allows you to print out each precinct separately and give this to the phone bank or the precinct chairman.
3. **Zip Code.** This is particularly useful for mailings. If you have the zip codes, you can print labels by zip code for third class mailings.
4. **Party Registration.** If your state has party registration, it would be useful to know who the Republicans are, not to mention Democrats and those pesky Independents. In states without party registration most databases can make intelligent guesses on party leanings based on primary turnout and survey data.
5. **Vote History.** People who voted in the last election are much more likely to vote in the next election than people who sat the last one out. If your resources are limited, you may want to only contact these "likely" voters. In non-party registration states, knowing who voted in which Presidential

Primary helps you categorize voters as likely Democrats or likely Republicans.

6. **Carrier Route Code.** If you sort your mailings by carrier route the post office will charge you less for postage. This code can be printed on labels so that your mail house can sort your mail accordingly and save you some money.
7. **Age.** Many voter files contain the date of birth of the registered voter. This will allow you to target your direct mail and phone messages by age group.
8. **Homeowner Status.** In some cases, homeowners will respond to property tax and other issues differently than renters. Knowing this helps you target your message.
9. **Gender.** Some issues have more impact with women than with men. Knowing the gender of the voter allows you to target your messages better as well as properly address the voter either in your mailings or telephone programs.
10. **District Designations.** Large counties or towns may have more than one state representative. Even the smallest county usually has different jurisdictions for local officeholders. Having this information on the file will allow your campaign more flexibility in targeting your voter contact programs.
11. **Issue Positions.** Once you have built the registered voter lists for your district you must ensure that you can use the information you've put on the list. If you are using a personal computer, make sure your software will do the things you want it to, such as sort by zip code or by street.

There are a number of companies that sell registered voter list-oriented software. Contact your state party or a representative of the RNC for the names and addresses of these companies.

A word about micro-targeting

Micro-targeting is all the rage in data building these days. The process consists of running a very large poll, of as many as 4,000 surveys in a Congressional size district, to reap tons of data. The consumer data from corporate America is overlaid on the survey

research and data specialists look for patterns. They might find that people who subscribe to *Guns & Ammo* magazine are likely to be 2nd amendment fans (big surprise) but they might also find that people who drive Buicks are more likely to be pro-choice.

This data is then applied to the voter file so that models can be built of what a Democrat voter, a swing voter, or just about any voter group looks like. That information is applied to every voter in the database so you really can target left-hand paper-hangers.

But like any tool, microtargeting can only do so much. Screwdrivers make lousy hammers, likewise microtargeting data can't solve all your problems. For one thing, microtargeting data is built on a likelihood scale from most likely to least likely. That means some voters are still in the middle, and we can't say for sure whether or not they are the pro-second amendment or the gun- grabbers.

Still, you can target everyone who is 70% likely to be pro-life for a special mailing or phone call with some confidence that most of the people on that list are what you think they are. As more and more microtargeting surveys are conducted by campaigns, more and more data is entering the files that you can access.

A word about software

All databases require software (the word we use to describe a computer program) to access the data. Most of the software out there is user-friendly or it would not survive in the market place.

However, some are easier to use than others. Don't buy anything until you have tried it out. Better yet, don't buy anything until you have tried it out, let it sit for a day or two, and then see if you can make it work. When a "techie" from the software company is holding your hand (on the phone, that is) everything works well. But can you make the thing work when he is on vacation in Aruba?

Make sure that the software can do what you want it to do. You want walk lists, make it produce walk lists. You want mail counts for Independents who are pro-life, make it generate the list.

Organizing the Precincts Precinct Chairmen

There's no doubt at all that Abraham Lincoln understood the role of the precinct chairman. Although the technology of communication and organization has changed since the 1840's, the job of the precinct chairman hasn't.

The task is still to identify our favorable voters, persuade the undecideds, and make sure our supporters go to the polls on Election Day. Just as in Abe's time, the people who can best do this job of identification and persuasion are found at the local level—in the neighborhoods.

Since the beginning of the 1970's both parties have relied more and more on sophisticated campaign technologies. Our campaigns have become exercises in centralized organizations and high technology. While these things are important, too often we have neglected the basic truth upon which precinct organizations are built - we may win hundreds and even thousands of votes for our candidates on TV, but we win our campaigns one vote at a time.

Although TV ads are cool and political hacks love to ogle over them, many elections are won at the local level. That's where the hard work pays off.

Setting up a precinct organization

If your campaign cares about organizing the precincts, you are going to have to set up an organizational structure.

Most campaigns organize their campaigns on the precinct level—the reason is that precincts are the base political unit in organizational politics. Precincts are small enough that a chairman can organize them, but not so big that they are unmanageable. Some highly organized campaigns appoint block captains, but the precinct chair is where the responsibility usually lies.

How do you go about recruiting a precinct chair? You do it the way you recruit any other volunteer. Look for someone who has been active in other GOP activities, or has worked hard in a campaign. Look through your contributor lists for someone who lives in the precinct - a person who has made a monetary commitment many times is willing to make a time commitment as well.

Make sure you explain to your precinct chairmen just what their duties are. It is better to level with them now than have people fail you in the crunch.

Tell them that you want them to run their precincts. Clearly delineate their duties and make sure they understand you will hold them accountable. Of course, find the best people you can.

What skills are you looking for? What kind of people make the best precinct chairmen?

Unfortunately, there are no consistent criteria you can use to find a good precinct chairman. Some are successful in civic organizations or local government; others are unknown to the community outside their work for the political party.

Here are some qualities you might want to consider:

1. *They must have time to do the job.* Look in the ranks of the retired for your chairmen. Non-working women whose children have left home may have time as well as students who attend a local college but live at home.
2. *They should live in the community and preferably have lived there for years.* If they know lots of people in their precincts it will make volunteer recruitment easier for them, and their opinions will be more respected.
3. *They should not be consumed by other projects.* Although you always want to look for people who are actively involved in other civic affairs, you should make sure your chairmen aren't over-burdened to the point they can't perform for your campaign.
4. *They should really want to do the job.* An ounce of enthusiasm is worth a pound of experience. People that have a burning desire to succeed will triumph over adversity and their own inexperience every time.
5. *They should be respected by their peers.* The precinct chairmen speak for your campaign in their communities. Well-respected precinct chairmen will win votes for your candidate.

Of course, some great precinct chairmen fit none of these criteria. Many do. Use this list as a jumping off point for developing your own criteria to assist you in your search for the "perfect" people.

A good precinct chairman can make the difference in winning or losing a hotly contested precinct. They are your "super-volunteers." That's why it is so important that you do as Lincoln suggests, and appoint a precinct chairman to work at the local level.

Duties of the precinct chairman

The duties of the precinct chairman should be spelled out in your campaign plan. If you can, give your precinct chairmen a say in how your organization is run. You'll find their advice is solid because they are in touch with the voters. Besides, they will probably have to carry out your campaign's programs, so it's best that they have a say in what those programs are.

It's rare in politics that a title is actually linked to work. Encourage this by giving your working precinct chairmen status in your organization.

Precinct chairmen are the foot soldiers of politics. In well-organized campaigns, they serve as recruiting sergeants as well. In order to get the job done, they will have to find volunteers to help them. A good chair will become a leader of a cadre of volunteers.

Most experts suggest that the precinct chairman needs to recruit one volunteer for each 50 homes or 100 people in their precinct. A lesser number can probably do the job, but they will never all be available.

A good precinct organization is almost always a prerequisite for successful door-to-door canvassing. If the precinct chairman does nothing else well, he must be capable of canvassing his precinct, or at least ensuring the job gets done by volunteers. That duty must be fulfilled.

A good precinct chairman works to ensure that his precinct delivers the vote for your candidate. Here are some of the things a good precinct organization might attempt to accomplish:

1. Voter canvassing.
2. Literature drops.
3. Ballot integrity.
4. Manning the polls on Election Day.
5. Voter persuasion efforts.
6. Neighborhood headquarters operations.
7. Volunteer recruitment.
8. Other campaign activities that must be conducted on the precinct level.

Keeping your precinct chairmen working

Care and feeding of precinct chairmen are important, and should not be neglected.

Since you are going to require much from your precinct chairmen, build in rewards as well. As mentioned before, you can't say "thank you" too often. Look for other ways to let the precinct chairmen know you care such as hosting private receptions before fundraising events to honor the precinct leaders or ensure that the Governor (or other elected official) sends them a personal "thanks" for their efforts.

Make sure that all your chairmen understand they are appreciated. If possible, give awards to the chairmen that do the best jobs, or make outstanding contributions to the campaign's volunteer effort.

Occasionally you may have to replace a precinct chairman. This should only be done because the work is not getting done. Don't let personalities affect the performance of your organization.

It is better in the long run to replace well-intentioned people who can't get the job done than to suffer along with them. It will hurt the morale of the other chairmen if you allow weak or poor efforts.

Some other thoughts about precinct organizations

1. Remember the WWII poster that showed the battle-worn but determined GI who says, "Give me the stuff and I'll do the job"? Make sure you give your chairmen the things they need to get their tasks accomplished. Provide them with precinct chairmen kits that explain their duties and give them deadlines. Make sure they get campaign and canvass materials when they need them.
2. It's probably a good idea to conduct some sort of training program for your precinct chairmen. They want to do a good job, but may not know how.
3. Post the names of the precinct chairmen in the office; this will emphasize just how important they are to the success of the campaign. The more important you make the job appear, the more important it will indeed become.

Voter Canvassing

Canvassing is the process of locating potential voters in a given geographic area and determining their voting intentions. Sometimes the term is also used to include one-on-one persuasion and literature distribution.

There are several methods of canvassing voters. The more traditional method is door-to-door; the other is telephone canvassing.

All canvassing is a variation of these two methods. Both methods can be used to determine the political leaning of the voters; both can be used successfully to deliver a message about your candidate.

Telephone Canvassing

The most common method used today for canvassing voters is via the telephone. Telephones are ubiquitous, with almost everyone having one, two, or even three phones. A telephone canvass requires less manpower than door-to-door, can be finished in a much shorter amount of time, and has more flexibility. A phone canvas can be cranked up in a fairly short amount of time.

Another advantage of the phone bank is that you have more control of the process. Once canvassers are on foot in their precincts, you have little control over how well they do their jobs, their rate of progress and even whether they actually canvass all the homes they claim, although smartphones and tablets have solved some of these challenges. In a phone bank all canvassing can take place under the nose of a supervisor and thus quality control is maintained.

But there are downsides as well. Even though everyone has a phone, fewer and fewer people are willing to talk to strangers over the phone. More and more people have cell phones, which are not matched as easily to the registered voter list. More and more people have caller ID and ignore calls from anyone but close friends.

Still, the phone is the cheapest means of reaching large numbers of voters quickly.

Phone Canvass

Before you can begin to plan a phone canvass you will have to decide just what your goals are. Many phone programs are begun without a clear idea of what they are trying to accomplish. Phone programs use up valuable time and money, which are always in short supply, so make sure you know why you are running one.

By their very nature, phone programs are versatile. By simply changing the script, you can change a voter identification phone bank into a Get-out-the-vote operation. By

calling at different hours you can increase the number of calls completed. The only limit to a phone bank is the quality of your calling lists, your imagination and time.

Unfortunately, time is the unrelenting enemy. If your phone operation is not well planned out, structured, and goal-oriented, you will run out of time before your work is completed.

Let's look at some phone options.

Paid or Volunteer?

Many campaigns find it easier and cheaper to pay a telemarketing firm to make the calls as opposed to trying to run a phone program themselves. The vendors use predictive dialing systems that ensure every number is dialed several times, have plenty of people to make the calls, and can canvass an entire district in a few nights. Their professional callers need little training, the data collected is in real time and the callers are constantly monitored for quality control.

The downside is that it is expensive. A four-question script can cost up to 70 cents per completed call, and some vendors charge by the attempt, which can get expensive. Also, paid callers, while they usually do a great job of reading a script, are not local and have no connection with the candidate, and it shows.

There are any numbers of national telemarketing firms you can contract with to do your phoning. There are some which specialize in working only for candidates of your party. Your state party leadership should be able to suggest some names.

A local firm might charge you more or less. Local firms may not have the quality control you want, and many have never worked with a campaign before and don't know how, but they can be cheaper.

Volunteer phone banks are cheaper in cost, but are a heavy drain on volunteer manpower. You will not only need volunteers to man the phones, you will also have to find either a volunteer or paid supervisor to make sure the phones are manned properly.

You may have to rent a location for a phone bank as well as install the phones, which will cost money. Using donated phones in an office after everyone goes home will entail some expense, and will take a lot of supervision. VoIP Systems (*voice over internet portal*) can be bought or rented so that as long as the campaign has a good internet connection, no phone lines have to be installed.

Some campaigns will rent a batch of cell phones and dispense with phone lines entirely. How many times have you heard volunteers say, "I'll do anything except make phone

calls"? Usually, such sentiment is the result of a bad experience with a phone bank. It doesn't have to be that way, and some local organizations run wonderfully successful phone banks election after election. If your campaign has a good volunteer base and can recruit good people to work with your volunteers, you can get the job done.

With the advent of Smartphones, many campaigns are using software that turns any new phone into a self-contained phone bank with a script on the screen and an interface with a predictive dialing system and real time reporting.

The campaign simply farms out the work to volunteers who will make the calls from their home or office or even in the car.

Your campaign can also operate its own "paid" phone bank. You follow the same process you would use to set up a volunteer phone bank. The difference is that you pay local high school or college students or even your volunteers' minimum wage. This method is cheaper than paying a professional phone bank except it's less dependable. Like a volunteer operation, you will have to find the phone bank location, install the phones (or buy/rent cell phones) and monitor the process.

Whatever you do, don't mix your volunteer and paid phone banks. Nothing will deflate your volunteers faster than the discovery that some people are being paid to do what they are doing for free.

Voter identification or voter persuasion?

Are you trying to determine how people will vote or are you trying to persuade folks to vote for your candidate? Finding out how a voter will cast his ballot in the election is called *voter identification*. Delivering a message to the voters via the phone is called *voter persuasion*.

Good voter identification cannot begin until the point in the campaign when enough people have made up their minds about how they will vote. If you call people in February, too many will not even know who is running, and you'll have to call many of them again later in the campaign.

If you try to do both voter identification and voter persuasion at the same time you may do neither well. Accurate voter identification requires that the people on the other end of the phone don't know the bias of the caller. Effective voter persuasion calls usually must reveal the political leanings of the caller.

You may decide to first do one type of call for a period of time, and then another. Many successful campaigns do this.

How do you use the information from the phone bank?

If your plans require mailing to the favorable or undecided voters, how will you structure your phone bank so you can capture this information?

Most telemarketing firms have their phones directly interfaced with computers so they have the capacity to upload information to your campaign overnight. If you run your own phone bank you will have to engage in some data entry, which can be time-consuming and error prone.

Smart phone software exists that can be used to skip this step and upload responses in real time to your campaign. It is worth the money.

A low-tech volunteer phone bank will have to do its calling from computer printouts. If you call from a printout, and your volunteers mark the responses on that printout, you can only "capture" the data when your phone bank is not operating—otherwise the printouts are being used.

As a result, it is not uncommon for a campaign to use two shifts of volunteers at the phone banks. At night, the volunteers make their phone calls. During the day, another group of volunteers enter data or address mail off of the phone lists.

How many attempts?

How many times will your phones dial a given number and not connect before that number is discarded? Predictive dialing systems can dial each phone number on your list as many times as you want, though the standard is three attempts per session.

Likewise, a volunteer phone bank should limit dialing to three attempts. Your phone bank may not have enough time to make that many attempts. Or you may want to vary the hour of the day each number is called so that your chances of reaching the voter while they are at home is improved.

Calculating the Phone Program

Planning a telephone program first means figuring out how many phone numbers you have to call. You can't figure the cost of the phone program unless you do this. Once you know how many calls need to be made, you can figure out how many phones you will need to call those numbers.

First, make an accurate assessment of how many voters need to be called. For the

purpose of this example, we'll say that Sunflower County has approximately 30,000 voters. We will further stipulate that we wish to call them all.

That leads us to an interesting question. Do we want to call every voter, or do we simply wish to call one voter in each household? Nationwide we find an average of 1.7 voters in every household. If we connect with each household only once, we can save a great amount of time.

Research shows voters in a household more often than not vote alike so determining the voting intention of one voter in a household is nearly as good as talking to all of the voters in each household.

This is especially true when balanced against the difficulty of calling back each household in order to reach each individual voter!

Let's assume that you have decided that one completed call per household is plenty. Therefore, for purposes of our planning, we will divide 30,000 times 1.7 for a total of 17,647 households.

Most campaign software can household phone numbers for you so you can skip this step. Most commercially available campaign database software will also household your list for you.

Second, you must take into account your phone match. Whether you get your list from the state party or the RNC Data Trust or a private list vendor, only about 70% of the voters on your list will have phone numbers attached. The number of phone matches varies from community to community, but 70% is the nationwide average.

The registrar of voters rarely provides phone numbers with the registered voter rolls, and when they do the numbers are often hopelessly out of date. To solve this problem, the party database and the list vendors run phone matches periodically to attach phone numbers to the data. Some phone matches are better than others, and the older the phone match the more problematic the list.

Again, for the purpose of this example, let's say that Sunflower County achieves a 65% phone match on their registered voter list. If this isn't good enough for you, you can pay a service to re-match your voter list with phones, and sometimes that will give you more numbers. The cost is not much, but can be too costly for large lists.

In a small campaign with a relatively small number of calls to be made it is sometimes useful to get volunteers to look up bad numbers in the phone book (how primitive!) or go online and try to match up some more numbers using a white pages type program.

If your volunteers are conscientious, and there are not too many unlisted phone numbers, they should be able to add another 5-10% to the phone match. Let's say we do that so we end up with a 70% phone match. So in our example, of 17,647 households in your area, you now have phone numbers for 12,353 ($17,647 \times .70 = 12,353$).

Third, you have to take into account inaccurate phone numbers - either the phone number is incorrect and you call the wrong house, or the number is disconnected. Unfortunately, in any list you must count on about 9% bad numbers. This is because so many people move, change their residence, die or change their phone to an unlisted number each year. So multiply our 12,353 by .91 for a total of 11,241 reachable numbers.

Fourth, estimate how much you need to pay a telemarketer or estimate the number of phones you need and the number of calling days and the number of hours your volunteers will call each day.

If using a telemarketer, the math is simple. Most telemarketers shoot for a 65% penetration of the file, meaning that they reach 65% of the homes. Since you only pay for completed calls then you can figure on paying for 7,307 calls (the actual number is always smaller than this, but it is safer to pad the budget a bit here just in case). Here's the math:

$$11,241 \times 65\% = 7,307$$
$$7,307 \times \$0.65 = \$4,749$$

Keep in mind that telemarketing firms are in business to make money, so you pay for "completed" calls even if the respondent tells the caller to drop dead and hangs up.

In estimating the numbers for your volunteer phone bank, be realistic. You must take into account local life styles, the amount of remaining time before Election Day, and your ability to generate volunteers for the phone bank.

Let's assume that you wish to start up the phone bank eight weeks before the election. Because it will take time to prepare for Election Day, count backward five days from the election and plan upon ending the voter identification phase of your phone bank on the Thursday night prior to Election Day. So instead of 56 days (seven days a week times eight weeks = 56 days), you have only 51 days. You will probably have to use at least the first week of the phone bank to call and recruit volunteers, so subtract another 7 days from your total, which leaves you with 44.

Now you have to determine how many hours a day you can call and what to do about weekends. The answer to this question is a function of your ability to generate volunteers and the local lifestyle and practices of your area.

For the purpose of this exercise, let's say we determine that we can find volunteers to call from 6:00 PM until 9:30 PM every night except Friday, and we can find volunteers to man the phones on Saturday from 10:00 AM till 4:00 PM and on Sunday from 4:00 PM until 9:00 PM.

Since there are six full calling weeks (Monday-Friday) between now and election day we can figure on a total of 84 calling hours for the weekdays and five full weekend calling periods.

6 Saturday hours X 5 Saturdays = 30 calling hours

5 Sunday hours X 5 Sundays = 25 calling hours

4 calling days per workweek X 6 weeks X 3.5 hours = 84

30 + 25 + 84 = 149 calling hours

So we have 149 calling hours and 12,353 calls to be made.

Now we have to make an estimate of the amount of time each call will take. It's a good idea to give your script a trial run with several "test" calls before you estimate the calling time. You also have to factor in the time that will be wasted calling busy signals, bad phone numbers, and wrong numbers.

For this example, let's assume we can make 20 completed calls an hour per phone. If you have access to a predictive dialing system, that number will skyrocket. A predictive dialing system, which is used by all professional phone banks, dials the numbers for you so your callers go from connected call to connected call with no time lost for bad numbers, disconnects or busy signals.

We can now do our math. With 12,353 (remember, 9% are bad numbers, but we don't know which ones they are so we have to dial those numbers to find out) calls to be made, we know we have 149 calling hours, and that we can make 20 completed calls per hour. Simply divide 12,353 by 20 and then divide that number by 149.

$12,353 \text{ calls} / 20 \text{ calling hours} = 618$

$618 \text{ phoning hours needed} / 149 \text{ calling hours} = 4.2$ (round up to 5 phones)

The bottom line is that if you follow the program outlined here, can keep the phones manned every day and make the calls at the predicted rate, you can do the job with 5 phones.

As a matter of practicality, volunteer phone banks never work at 100% capacity, so you will either want to plan on additional phones up front (in this case, say, 6), or have the ability to expand to additional phones if needed.

All of this begs the question whether your phone bank will be installed in your headquarters, will use phones already in use at a local business but available to you after regular working hours, or will be cell phones used by volunteers outside the office.

Using a local business as a location for your phone bank has one major advantage - price. Even if you have to hire a phone bank supervisor and even pay something towards the rent, a business phone bank will save you money. Sometimes businesses have to pay the phone company for each call made on their phones. So find out before you run yourself or your friendly business office into the poorhouse.

There are distinct advantages to installing and operating your own phone bank. You have better security and can better monitor your volunteers and the quality of the phone call. You can also make calls during the working day, which gives you much more flexibility. The phones will also be available to your committee on Election Day for GOTV efforts.

Using a VoIP system can even give your home-grown phone bank the efficiency and speed of a telemarketing firm, using a predictive dialing system.

Operating your own phone center doesn't have to be expensive. You can buy or rent cheap cell phones to avoid installation costs. Even if you have to install the phones, you may be able to put them in a donated building or your headquarters and thus pay nothing for rent. In that case, you'll still have to pay for the phones, however, and some buildings cannot be wired for more than a few phones without incurring a major expense.

Phone Bank Hints

If you are going to install phones for your canvassing operation here are some helpful hints to make your phone bank run smoother:

1. Always have one phone dedicated to the use of the phone bank administrator. This phone is used to follow up with volunteers and receive any incoming calls.
2. If possible, always have someone in charge of the phone bank. If you can afford it, pay someone to be there every night to make the phone bank meet its goals. If you can't afford a paid manager,

recruit a good volunteer who can give you the time and is good with people. In any event, someone needs to be able to give your volunteers direction, keep them working and help keep morale up.

3. Make sure that at the end of every calling day you tabulate the number of calls completed and the results of the calls. That way you can keep track of progress and push the panic button only when it needs pushing. Again, a VoIP system or the use of smart phones makes this a snap.
4. Keep the scripts as simple and as natural as possible. Try them out yourself before asking your volunteers to try them. You may discover some rather embarrassing tongue twisters.
5. Always recruit more volunteers than you need. Some always fail to show and if you have more than you need you can rotate and give people a break every now and then.
6. If you want good voter identification information you must make your questionnaire (your script) as non-partisan as possible. If folks know you are calling for Congressman Abner Shimoney many of them will tell you they support him just to be polite.
7. Always conduct a training session for your volunteers. It will give them more confidence and will improve the quality and speed of the calling.
8. Always say thanks. The candidate should stop by the phone bank and say thanks.
9. Reward your best volunteers publicly, even if the reward is only a pat on the back. This will keep them coming back again.

If you install your own phones, here are some questions you might want to ask the telephone company.

1. What is the cost per line (one phone/one line)? Is there a line charge separate from the equipment rental?
2. Is there a message unit cost (i.e., do you pay for each local call, or is there a set rate for each line per month)?

3. What are the taxes and surcharges?
4. What kind of deposit or up-front money is required?
5. Can you give the phone company a letter of credit or post a bond in lieu of a deposit?
6. What are the installation costs?
7. What is the minimum length of service?
8. How much lead time is required for installation?
9. Can you get enough phone lines installed at this address? Now you know why so many campaigns skip phone installation and use "throw-away" cell phones. The only question you have to ask is "how much does it cost?"

Phone Bank Formulas

Here again are the formulas for estimating your telephone needs:

1. Estimating households:

Divide the number of voters by 1.7

example: 100,000 voters divided by 1.7 = 58,824 households

2. Estimating phone match:

Multiply the number of households by 65%. (Remember that you can increase the phone match using hand look-ups with your volunteers, but until you try it there is really no way to estimate your success rate).

Example: $58,824 \times .65 = 29,412$

3. Estimating bad numbers, etc.:

Multiply the number of households with phone numbers by 91%.

Example: $29,412 \times .91 = 26,765$

4. Estimating the number of phones needed:

- a. Using the methods above, figure out the number of calls that must be made.
- b. Estimate the number of available calling hours
- c. Estimate the number of completed calls per hour
- d. Divide the number of calls to be made by the estimated number of completed calls per hour.
- e. Divide this number by the number of hours available for calling

Examples: 29,412 calls to be
made 110 estimated calling
hours

20 completed calls per hour

Scripts

Telephone bank scripts should be kept as brief as possible. A brief script is easier on your volunteer caller and less time consuming (annoying?) to the person who is called.

Most scripts begin with an identification of the person being called to ensure that the name and telephone number matches the person on the other end of the telephone. For example:

"Hello, is this Mr. Smith?"

The next sentence the caller says is important as well and is sometimes a source of controversy in volunteer phone banks. Most people will not talk to a nameless, unidentified person on the telephone. They want to know who they are talking to and why they are being called.

The problem is that telling a voter you are a democrat or are calling from Smith for Senate headquarters will bias the responses. Even when it comes to politics, people want to be polite and are inclined to tell the caller what they think the phone wants to hear. Many campaigns avoid that problem by skipping over the question of where the call is originating:

"My name is Joe Blow, and we're conducting a survey of voter attitudes in Lower Podunk. I'd like to ask you a few questions..."

Other operations use scripts like this:

"I'm Fred Smith, a volunteer helping with a survey of political attitudes in Upper Podunk. We can't tell you the name of the organization doing the calling, but your responses will be kept confidential."

Telemarketing firms usually use their own name and thus keep the sample bias free.

The most common scripts used by both campaigns and local party operations are designed to determine who the respondent supports for one or more offices in an upcoming election. This "ballot test" type of script is usually short and to the point. For example:

"If the election for Congress were held today, would you be voting for Dithers the Democrat, or Shimoney, the Republican?"

Some campaigns vary from the formula above and run what is called "advocacy" phone banks. These phone banks actively assist a candidate in building name identification or support. A method often used by advocacy phone banks is to give the voter information about the candidate and/or his opponent and then ask for a commitment. These types of scripts can be very persuasive. For example:

"Hello, I'm Joe Blow, a volunteer calling on behalf of Abner Shimoney, the GOP candidate for state Assembly. Abner is the only candidate running for the assembly who has pledged to vote "No" on new taxes. Can I tell Abner he can count on your vote?"

Sometimes both methods (the ballot test and advocacy) are used. It is expensive and time consuming to reach a significant number of voters in the community to determine their voter preferences. It seems only logical to use the connection to plug our candidate, particularly among undecided voters. For example:

"If the election were held today would you be supporting Republican candidate Smith or Democrat candidate Jones for Sheriff?"

(If Smith)... "Thank you. Be sure to vote November 6th. Goodbye."

(If Jones)... "Thank you. Goodbye."

(If undecided)... "Republican candidate Smith has more than 20 years in law enforcement, and has been endorsed by the Podunkville Times. I think he'll be a great sheriff, and I hope you can support him. Thanks for your time and be sure to vote on November 6th."

Home/Off-site Phoning

Because phone banks are expensive and hard to man with volunteers, many political organizations utilize home or off-site phoning. Off-site phoning is based on the idea that it is easier and cheaper to get ten people to call from their homes than it is to round up ten volunteers and get them to go to a central location and do their phoning there. With the ubiquitous spread of cell phones, almost every adult in America has the ability to make phone calls any place they can get a signal.

Home phoning is ideal for volunteers who want to help, but must stay at home.

The problems with off-site phoning are many.

First, your committee has no control over the quality of the telephone call. If the questions are asked in a biased manner, the information will be slanted, and possibly false.

Second, there is no guarantee that the calling will get made. After all, all it takes is one teenager hogging the phone or a small domestic crisis to block out hours of home phoning (smart phones obviate this problem because the data is uploaded in real time so it is easy to tell who is making their calls and who isn't).

Third, in order to conduct off-site phoning, you must prepare individualized phone lists and send them to your callers, and then fetch them back after the calls are made.

Door-to-Door Canvassing

Using this method campaign volunteers walk down every street, knock on the doors and ask the voters they find at home a battery of questions and/or deliver a pro-candidate message. This method is very effective, particularly in persuading voters to cast their ballot for our candidate. However, it is very volunteer and time intensive and thus puts a tremendous drain on volunteer resources.

Studies show that door-to-door canvassing can be very productive. People are more willing to talk to a friendly person at their doorstep than they are an anonymous voice on the telephone.

Door-to-door canvassing can also be an effective tool of voter persuasion. A neighbor asking you for your vote has more punch than someone you don't know asking you for a vote on the telephone. A good door-to-door canvass features neighbors talking to other neighbors about the values they share. It is hard to impugn the politics of someone who has shaken your hand and asked for your vote.

Even though door-to-door canvassing is people intensive, it doesn't have to be expensive. A volunteer-rich campaign can conduct extensive canvassing for the cost of supervision, the campaign materials, and gasoline.

However, there is no such thing as a free lunch, and a volunteer intensive canvass requires a lot of time. To do it right means spending some money too.

We will discuss door-to-door literature drops at the same time we discuss canvassing. The two go hand in hand.

Literature Drops

"Lit drops" are nothing more than the mass distribution of campaign or party literature, using volunteers rather than the postal service. There are two basic ways to conduct lit drops – organizational distribution or literature blitzes.

Organization distribution is a fancy phrase for literature distribution through your precinct organization. Literature is distributed to the precinct chairmen and they are responsible for getting the literature out to every home in their precinct. They are given a date by which time this is supposed to be finished, but methodology and timing are left up to the precinct chairmen.

Allowing each precinct chairman the flexibility of making his own literature distribution schedule is easy on the leadership of the local party or campaign, but it is not an overly accountable system. A good, proven precinct organization can be trusted to get this job done. Weak or new organizations need more of a push. That's why someone invented literature blitzes.

A literature blitz takes place all at once. Precinct leaders and their helpers meet at a central location on the day of the lit drop. They receive their literature and words of praise for their help and their assignments. Usually, the candidate is on hand to build enthusiasm and personally thank the workers.

After they have finished their assigned areas, the volunteers return to the central location to report their progress. If time allows, they are given a new assignment and sent back out.

Good campaigns also schedule a party after the literature blitz. The party serves as a reward for a job well done and reinforces the comradery that activities such as this can generate in your volunteer team. It's the least you can do for these folks.

Walking the Precincts

Canvassing is an information gathering and often a voter persuasion technique. It requires that volunteers talk directly, face to face, with people in their homes.

Walking the precincts or door-to-door canvassing can be executed over a period of time or can be organized for one day or weekend. Because many campaigns combine their door-to-door canvass with a literature drop we'll outline the steps in coordinating a combined effort.

Step one - Prioritize your precincts. Every precinct is important, but some are more important than others. If you lack the people to cover all the precincts, decide which precincts you *must* cover and make sure those are canvassed. Chart these priorities on a map of the area so you can see at a glance the logistical challenges you will face in getting your workers to the right places.

Step two - Prepare walk lists for each precinct if possible. It's much easier for your canvassers if they don't have to write in each name on their canvass sheets. Pre-printed canvass sheets improve the accuracy of your results. Walk lists are also a great aid to voter registration. If your canvassers are outfitted with smart phones, all of this data can be uploaded into their devices.

Step three - Scout out the area to be walked for potential problems. Check out housing density - if the area is densely populated it will take more volunteers to canvass it. If the homes are spread far apart, it may not even be possible to walk the area, and it must be done by automobile. Apartment buildings sometimes require special care because of limited access or security problems.

Step four - Determine the number of people you will need to canvass each precinct. Check with each precinct chairman to insure that enough people have been recruited to do the job. If not, recruit some "floaters" or extra volunteers. These are usually college students, high school students, or other volunteers who will go wherever you need them.

Step five - Print and distribute the materials the canvassers will need. It's best if you can give each canvasser or precinct chairman a packet of materials with their name on it.

Step six - Conduct a training program. This step is particularly important if you are conducting a canvass. If you want accurate voter identification without bias, you will have to train your canvassers to be objective. Your volunteers must not be allowed to badger the voter nor should they use their own judgment about the respondent's leanings. Good information requires accuracy in the collection.

Here are some of the more likely things your canvassers will need:

1. A street map of the area to be canvassed.
2. A name badge to identify the canvasser as an official canvasser (some people will not open their doors unless they see some kind of identification)
3. Prepare a list of do's and don'ts ("avoid dogs, don't jump over fences, etc.") for your volunteers and make sure everyone reads it.
4. Voter lists or printed canvass cards organized by street.
5. Literature on the candidate
6. Volunteer cards
7. Bumper stickers
8. Absentee ballot applications or instructions
9. Polling place information
10. Voter registration instructions or application
11. A "sorry I missed you" door hanger
12. Instructions for the canvasser

If you are going to use the information you receive on favorable voters, you will have to train your workers to confirm the telephone numbers as they talk with people. If you want them to read a script, again, training will be required.

A simple literature drop will not need a training program of over ten or fifteen minutes, but even then, you will need to brief people about the law and their canvassing routes.

Some Key Points on Door-to-Door Campaigning

Timing is important. Be sure to do your canvassing when people are home. In most communities, that means weekends and evenings. Whenever possible, try to complete your walk before dark—in many neighborhoods, people won't open the doors to strangers after dark.

Keep the contact brief. Conversations at the doorstep should ideally take no more than 30 seconds. Remember, a lot of canvassing has to get done. Thirty seconds gives you plenty of time to make your pitch, ask and receive information and drop off your literature. Never argue or engage in debate.

Be polite. Canvassers are representatives of the candidate. Leave people with a good impression.

Ask for support. At some point in the conversation ask for support for your candidate. You are missing a bet if you don't ask for a commitment. This wins votes and solidifies the supporter's commitment to vote on Election Day.

If you can help it, don't walk on people's lawns. Some homeowners resent it and sometimes their dogs do too.

Don't put literature in the mailbox. The mailbox is technically government property and it is illegal for anyone but the postman to use it.

Supply information. You have a voter in your grasp; don't let him or her get away confused or uneducated. Make sure your canvassers have absentee ballot applications, precinct directions, sample ballots, candidate information or whatever you think your voters need. Again, studies show that face to face communication is the most effective means of winning votes. Don't waste any opportunity to take advantage of it.

Voter Registration

Depending on where you live some 25 to 35 percent of the adults in your area are not registered to vote (the US Census estimates 59 million US citizens who could be registered to vote, are not registered). With many elections decided by less than a percentage point or two it's easy to see why registering more voters who can learn your way might be a priority for your campaign.

Recent studies have exploded the myth that Republicans register at higher rates than do Democrats. The truth is that the unregistered public holds views about politics very similar to folks who are registered. Whatever the percentage, we know there is plenty of fertile territory out there for registration efforts.

There are many ways of conducting a voter registration program. A good voter registration method meets these three criteria:

- It registers more of your people than theirs.
- It doesn't eat up resources unnecessarily.
- It registers a significant number of new voters.

No program will work perfectly, but those are good goals to shoot for. The best program will register a significant number of your partisans, and yet use the minimal amount of resources possible to get the job done.

Before you begin your voter registration efforts, learn the law regarding registration. Every state has different laws, and some of them are very restrictive. Find out what you can do, and what you can't. Here are some of the questions you should find answers to:

When does registration open and when does it close?

In some states people can register to vote any time. In others, there is an "open season". Many states close voter registration a certain number of days before the election. Find out the deadlines so you don't miss them.

What are the requirements for registering to vote?

How long do you have to live in the area to be considered a resident? What are the rules on college students living away from home? Find out who can register so that you attempt to register only those who legally can. Make sure that no supporter is unlawfully denied his right to register.

Who can register voters?

In some states, campaign workers can be deputized to register voters. In other states only a member of the board of elections can do the job, and sometimes only at the registrar's office. Other states allow party canvassers to carry voter registration cards with them. Find out.

Where do people go to register to vote?

In some counties the only place to register is at the courthouse, and then only three days a week. Other areas are less restrictive, but it pays to find out just what the law says, and what the local practices are. If people can register at the local shopping center, find out when the registration booth will be open. Under Federal Law, the states must allow registration at certain state offices (Dept. of Motor Vehicles, etc.) and through the mail.

How are the voter lists purged?

In some states an individual who hasn't voted in recent elections must re-register. Find out why voters are purged from the rolls so that you can locate purged voters and get them re-registered.

Now that you understand the law and the limitations the law sets on your voter registration program; you must find unregistered supporters' people and get them registered.

Find Unregistered Supporters

The first hurdle in conducting a registration operation is finding the unregistered. Here are the most common ways.

1. Voter canvass.

This is a door-to-door canvass performed by volunteers. Every door possible is knocked on and non-registered people are located. Obviously, this is very labor intensive, but you can improve your odds of finding

unregistered people by concentrating on new housing developments and high transient neighborhoods.

2. Telephone canvass.

Using a city or crisscross directory, all households in a precinct, town or street are called by either volunteers or paid callers. After asking which candidate or party the respondent supports, ask if they are registered. A variation on this is to call every registered voter, and at the end of each conversation, ask if anyone else in the household is unregistered.

3. Computer matches.

Using the modern-day wizardry of computers, match the list of registered voters with a list of adults. This should give you a list of adults who are not registered. Many state parties have found the list of people who have driver's licenses a useful tool since most adults drive. There may be other lists in your community that would be nearly as good, such as a list of property owners

4. Coalition groups.

Certain coalition groups may be more favorable to your candidate than other groups. Match these lists to the registered voter list to determine who is unregistered, but still a member of a group that is supportive. For instance, a candidate who is a realtor and is supported by the local realtor's association should move heaven and earth to ensure that every realtor he can find in the community is registered to vote.

Contact the Unregistered

If you have used a door-to-door canvass to locate your unregistered supporters, it is an easy step to give them the information they need to get registered - often you can do it right there at the door. If not, you can give them a register by mail form they can fill out and send in. As mentioned before, in some states your canvassers can register folks in their homes, and in other states, your canvassers can give out registration forms.

Just make sure your canvassers note the name, address and phone number of the unregistered supporter for follow-up activities.

The second best means of contacting the unregistered is via the telephone. Using a list generated by your database software or any other method, compile a list of unregistered supporters, have your phone bank call these folks and give them instructions on voter registration.

Another method, though expensive and less effective, is to send a mailing to every potential voter.

Make Sure They Get Registered

If you have spent the time and energy to locate a favorable unregistered citizen, it is certainly worth an additional investment to ensure they register.

Check the voter registration rolls periodically to see how many of the people who told you they were planning to register have followed through. A reminder telephone call would be appropriate at this point to push the process forward.

Whether you have talked to them or not, you can send a mailing to these potential voters reminding them of their commitment to get registered and telling them how to do so.

If all else fails, offer to provide transportation to the registrar's office. It is worth the effort because every new supportive person registered is one more likely vote for your candidates on Election Day.

Early Voting/Absentee Ballot Program

Early voting and absentee voting has become a crucial factor in many elections. Voting laws in many states have become more flexible and as a result, many campaigns are making early voting and absentee voting programs a priority.

In some states, more people are voting early than are voting on Election Day. In others, early voting still has not caught on. Two states have gone completely to mail-in ballots, and only count what many would call "early ballots". With advance planning, you can increase the turnout of your supporters in casting absentee ballots.

Early Voting

Every state has different rules and regulations regarding early voting. Find out about yours. Particularly, determine:

- When does early voting start?
- Are there any restrictions on who can vote early?
- At what point in time does early voting end?
- At what locations can early votes be cast?
- What are the past early voting trends?

Your campaign needs to know this information long before the first ballot is cast. The fact is that early voting can be a benefit to your campaign as it gives you more time to drag your voters to the polls. A ballot cast early counts just as much as one cast on Election Day. Think of an early vote as money (well, a ballot anyway) in the bank.

If early voting takes place in satellite locations your team of volunteers may want to work the polls at those locations. Your identified supporters should be informed of early voting locations, times and places so that they can take advantage of them. If you have a voter check off system for Election Day, you will have to make adjustments in it to take into account the thousands of voters who may cast ballots long before then.

If there are restrictions (some states require that voters certify they will be out of town or away at college) on early voting, you must take these into account when informing your supporters.

If early voting ends at a certain date, again, your supporters need to know about this. Last minute phoning, mail and even radio ads could be used to get your people to the polls.

Early voting can also affect your media strategy. If half of your voters vote a full week out from the election, you probably need to start your TV and media buys earlier, and your GOTV mail needs to be dropped over a longer period.

Absentee ballots

Because every state has different absentee voter laws they can't be listed here. You need to find out the laws regulating absentee voting before you take another step. Call the state party and see

if they can help you. Failing that, find a local lawyer who is willing to look up the law for you. Your state board of elections or Secretary of State usually has a website with information on absentee ballot rules and regulations.

Consider appointing an absentee ballot chairman for your campaign. A proper absentee ballot program will require time, attention to detail, special knowledge of the law and volunteer support. It might be best to put a good volunteer in charge of the project so that the program doesn't get lost between the cracks.

Every absentee ballot program consists of five steps:

- Crafting your program to fit the election law.
- Obtaining a list of potential absentee voters.

- Pre-selection of voters or determining for whom these people will vote.
- Putting absentee ballot information or ballot request forms into the hands of selected potential absentee voters.
- Follow up work to ensure that the absentee ballots are cast.

Step one - Before beginning your absentee ballot program, research the legal restrictions. The Secretary of State, state board of elections or state Party can provide the necessary information. Here are some questions you should have answered:

- Can you legally mass mail unsolicited absentee ballot applications to voters?
- In what form must the application be?
- What are the requirements for absentee voting?
- In addition to the ballot application, what other information can be included in the mail package?
- What are the deadlines for the distribution of absentee ballots?
- What is the last day that absentee ballots can be mailed and still be counted?
- What is the last day that absentee ballots can be requested?
- Do the applications have to be mailed directly to the registrar or board of elections, or can they be mailed to a third party, such as the local GOP headquarters?

Once you know the answer to these questions you can begin to develop your absentee ballot program.

Step two - One way to insure a successful absentee ballot program is the targeting of potential absentee voters.

If you can, obtain a list of people who have voted absentee in the past. These voters are much more likely to vote absentee than other voters. You may be able to get this list from the local or the state board of elections.

Look at the last election and discern which precincts have voted large number of absentee voters in the past.

Senior citizens vote absentee in large numbers. Locate seniors through nursing home directories, senior citizen housing developments, etc. Your voter registration lists should contain age information as well.

College students frequently vote absentee, but this is a hard group to locate. Encourage the College Republican or Democrat Clubs in your state to run absentee ballot programs.

Businessmen and women are among those voters who are possibly out of town on Election Day. Many times these people don't vote because they are simply too busy to go through the hassle of acquiring an absentee ballot. The chamber of commerce or other business groups may be willing to cooperate with you in getting absentee ballots to their voters.

Step three - If possible, it would be advantageous for you to know for whom the potential absentee voter will cast his ballot before you expend precious resources in getting him a ballot.

As Americans, we think supporters should vote, and we encourage them to do so. But the resources of your campaign are limited, so we can only spend our time and money ensuring that all GOP ballots are cast.

There are any numbers of ways to determine the leanings of potential absentee voters. If you are running a voter identification phone bank you can kill two birds with one stone by asking favorable voters if they need an absentee ballot. The same thing can be done through your door- to-door canvass.

You can also call the list of people who have requested ballots and ask them their preference.

Or you can mail only voters who are registered Democrats (in party registration state) or those who have voted in previous DNC primaries (in non-party registration states).

And of course, you can give instructions on voting absentee on your website and your postings on Facebook and other social media.

Step four - Mail or hand-deliver an absentee ballot to every supportive voter who needs one. You can do this by mailing people located through your canvass or phone voter identification program.

If your committee has the resources, you can mail all registered GOP voters absentee ballot information (in some states you can send them a ballot or ballot application) as part of your normal voter persuasion efforts.

Any method you use is fine as long as it does not violate state legal restrictions and as long as it puts ballots or ballot applications in the hands of supportive voters.

Step five - A campaign often does an outstanding job in identifying, locating and contacting potential absentee voters, but fails to aggressively follow up on their efforts.

A great many absentee ballots that are requested are never completed and returned. Your organization must follow up and ensure these ballots are cast.

Maintain a list of names, addresses and phone numbers of everyone you have located that wants an absentee ballot. Send them reminder letters, call them or even visit them to ensure the ballots are returned on time in the proper form.

Again, check with the local party as well as other political campaigns that will be operating in your area. If they have an absentee program, find out how you can cooperate with them to save money and time.

In the last few years several Congressional elections have been decided by the absentee vote. Make sure that when the absentee vote is counted that your candidate gets a boost from the results.

Get-Out-The-Vote (GOTV)

GOTV is the uniquely crucial part of your voter contact program. You cannot win election if our supporters don't turn out and vote.

When planning a get-out-the-vote (GOTV) effort you must first develop the list of names to be contacted and urged to vote.

Deciding Your GOTV Targets

Naturally, your voter canvass—either by phone or on foot—is the best source for these names. In the course of the campaign your workers will find every voter they possibly can favorable to your candidates. These are the targets of your GOTV efforts

Even if your campaign can't afford to conduct a voter identification program, you can still do GOTV, for instance in very Republican neighborhoods. If you know the GOP usually gets 70% of the vote in a given precinct, it is probably worth the effort for a Republican candidate to call every voter in that precinct and urge them to vote. Yes, you will be turning out some Democrats, but 7 out of 10 voters will be Republican.

Another GOTV target might be registered Democrats or DNC primary voters. Lacking a voter identification program, you can still bet that these voters will favor your democrat candidate often. Many campaigns concentrate all their efforts on these two groups.

Preparing for Election Day

A first big step is to put your lists of favorables into a format you can use for your GOTV efforts. Try to get a computer to do this for you if you can. Get it to print out your lists of favorables with their phone numbers on a printout that has up to 30 households per sheet. The computer selection can also be done to run the lists in street list order.

Using a computer to generate cards (or labels and that can be affixed to cards) that contain the phone numbers, names and addresses of favorable voters is another preferred method.

If your system is not that sophisticated, at least develop some method so that callers know who to call and who to ignore. For example, use a yellow highlighter to highlight those names you want to turn out. You also want to be able to clearly mark the names of people you've made a GOTV call to in case you want to make another call.

GOTV Phone Calls

The theory behind GOTV phone calls is that a reminder call on or before Election Day will improve turnout. Various groups have tested this theory and have discovered that calls like these can improve voter turnout by as much as 10% in low turnout elections.

No phone bank can change instantly from a voter identification program to GOTV, so all voter identification telephoning should be completed by Thursday or Friday night (assuming the election is the following Tuesday). GOTV volunteer recruiting efforts should also be finished by the same deadline. This will give you time to organize the GOTV. It is better to over-recruit than to have phones idle during the GOTV phase. There is always something that needs doing around a phone bank and you'll be able to keep extra people busy.

But before you can figure out how many people you need for Election Day, you'll have to figure out how many calls must be made and the number of phones that will be needed.

- Project the number of favorable voters you will want to call.
- Multiply this number by two figuring that at least two calls will be made per household. If you have the resources, you may want to call each favorable household once on Saturday, Sunday or Monday, and then again on Election Day.
- Figure out over what period the calls will be made. Studies show that reminder calls are just as effective on Monday night as they are on election day, if not more so. Sunday calling has also proven to be effective.

- Figure out how many phones you can scrounge up and what hours you can call. For GOTV calls, figure that your callers can make 30 - 35 completed calls per hour (a higher number of completed calls per hour than in your voter identification calls). Simply divide the number of calls you want to make by the number of hours you will be calling and divide that number by the number of calls you feel you can make each hour per phone.

Example: Assume you have identified 10,000 favorable households. You want to start your calling on Sunday and finish the first calls by Monday night. On Election Day you will call everyone two more times.

You decide to call from 2:00 PM on Sunday until 9:00 PM Sunday night (7 hours). You will also run your phone bank for three hours Monday night for total of 10 hours. 10,000 divided by 10 hours is 1,000. Divide that number by 35 calls per phone per hour, and you need 29 phones for Sunday and Monday night. That's a lot of phones.

The polls open at 7:00 AM and close at 7:00 PM. You probably can't start calling any earlier than 8:30 AM and will stop calling at 6:30 PM. That gives you 9 and 1/2 hours of calling time on Election Day. Since you want to call each number twice, you will need nearly double the phones you had in operation over the weekend.

$$10,000/10 \text{ hours} = 1,000 \times 2 \text{ calls} = 2,000$$
$$2,000/35 \text{ calls per hour} = 57 \text{ phones!}$$

Therefore, so many campaigns use telemarketing phone banks for GOTV calling.

A common failing of many voter identification programs is neglecting to recruit enough people and/or phones for the GOTV phase. It takes a lot of phones. Most campaigns must supplement their phone banks with business locations. Large counties sometimes must establish four or five phone banks at separate locations, which makes coordination a nightmare.

Remember, most businesses are open on Monday and Election Day, which means you will not be able to use them during business hours. The good news is that most businesses are closed on Sunday, an appropriate time to make your GOTV calls.

If you have enough volunteers with smartphones, you can dole out numbers to them all day long and keep track of your progress instantly.

GOTV Mailings

Direct mail is another method used by many campaigns to turn out their voters. But be careful about postal delivery. Even the best post offices sometimes deliver mail a day or two late. With GOTV mail, a late mailing is wasted money and possibly an election lost, as well as very embarrassing for all concerned when your mail is delivered on Wednesday after the election.

GOTV mailings are expensive and can be time-consuming (when done in-house). You have to collect the names of the favorables from your phone bank and address your mail off that data. Unless you are using database software, this is a tedious and labor-intensive process. If you have a choice between mailing and phoning, you might want to give priority to the phones.

Still, if you have the time and the resources, a GOTV mailing might supply that extra push you need to get your voters out. A combination of GOTV mail and GOTV phoning will doubly ensure the favorable voter turns out on Election Day.

Most GOTV mail is in postcard or self-mailer format. The message is simple and direct, so nothing fancy is called for. Tell folks to go vote and tell them why. Make sure the mail gets to people in time.

Door hangers

Door hangers can be effective but take time and volunteer manpower. They are relatively cheap to print; the expense comes in either die-cutting the cardboard or heavy paper stock, so it fits over a doorknob or fitting each card with a rubber band.

Door hangers are delivered by squads of people spread out over neighborhoods putting little door hangers on the front doors of supporters. The door hangers contain the same message as the postcards—go vote and here's why.

If you can, have your volunteers go out early in the morning on Election Day so that the voters will be reminded to vote as they walk out to their car. This method is more effective than leaving the door hangers on the doors during Election Day to catch folks as they come home from work. Many campaigns claim success with this program performed in the afternoon during the day before the election or even on the Sunday before that.

Some campaigns print walk lists with the names and addresses of supporters marked for their door-hanging volunteers. This is the most accurate way to ensure that only supporters and Republicans are reminded to vote. Make sure your walk lists are easy to

read because it's very difficult to read a walk list as one walks from one house to another at 5:00 AM on a pitch black morning. Particularly, if it's raining.

Many campaigns only use door-hangers in their best, most supportive precincts and put the door hangers on everyone's house in the precinct. They figure that since 65% of the voters in the area support the candidate of your party, they'll take the chance that the door-hangers will also bring out some of your opponents. "Blanketing" precincts like this takes less coordination and technology, but more manpower.

Victory Squads

Victory squads are teams of roving volunteers who actually knock on the doors of favorable voters and urge them to vote. If no one is home, they leave a door hanger. The best results are obtained when each team also has a car and driver that can whisk the voter away to the polls while the volunteer minds the baby, watches the roast or washes the dog.

Victory squads are volunteer intensive. Also, with so many women now working outside the home, the squad can visit house after house and find no one at home.

A face-to-face communication from a neighbor is certainly more effective than a reminder from a disembodied voice over the telephone.

Sign Waving

In some states, it has become standard for volunteers (and sometimes candidates) to wave signs at key intersections to rouse interest in the election. Since there is no proven method of differentiating GOP cars from Democrat automobiles, the signs will not be waved exclusively at your supporters. Do this activity in or around supportive areas.

Be careful you don't cause accidents. Attractive young people may get the attention of drivers, but can also be traffic hazards.

Sound Trucks

Although outlawed in many cities, sound trucks are effective in some types of neighborhoods. If you contemplate their use, check with your local law enforcement officials first. Also make sure you don't blast out your messages near the hospital or cause heart attacks at the senior citizen center. Sound trucks are not much in demand these days and are therefore somewhat scarce, so plan this activity long in advance.

Check with the local "experts" before you run a sound truck through their neighborhood. You could lose more votes than you gain if you are not careful.

Transportation

A traditional activity for many local parties is providing transportation to the polls. This can be very effective, and even more productive if linked with the phone bank or the victory squads.

In the past, the biggest drawback to this program was the agonizing slowness with which it functioned. Drivers would take one voter to the polls, then have to return to HQ or call in from a pay phone to get their next customer. Today, with the proliferation of cell phones, this program can work efficiently.

Even better, with GPS systems and smart phones, most of your volunteers can easily find both the voter and her polling place.

Get-Out-the-Vote Examples and Lessons

Allocating the resources for a Get-Out-the-Vote (GOTV) program is a difficult task. It is one of the critical decisions of a campaign.

In many local elections the number of partisans who do not vote on Election Day is about the same as the number who do.

Lincoln and his party swept Sangamon County in 1840. He was successful in balancing the two factors that you need to balance today. How much effort do you spend talking to the doubtful (undecided) voters? How much time do you spend bringing all the favorable voters to the polls?

In this section, we'll look at four different campaigns and how each GOTV drive was handled. Each campaign made good GOTV choices in light of their political strategies. We'll look at what they did and why they did it. These four campaigns will help us develop two rules for using Get- Out-the-Vote strategies in your campaign.

EXAMPLE ONE: JOE BRAXTON

Joe Braxton is a candidate in a Republican primary for the state senate. He's running in a southern state where there is no party registration (people can ask for either party ballot), and turnout in Republican primaries has historically been low.

While there are 50,000 registered voters in this district, Braxton expects 2,000 votes will win the primary. He has a budget of \$50,000 for the primary.

Braxton uses the GOPdataTrust to come up with a list of people who were identified as Republicans through phoning in the last Presidential campaign—a total of 9,000.

Braxton hires a phone bank service to call the list of 9,000, plus every voter (2,500 total) in the three most Republican precincts in Braxton's home county.

He finds he has 7,500 telephone numbers for the 11,500 names. Of the 7,500 phone numbers available, the phone bank makes contact with more than half—4,000.

Those 4,000 were asked, "If the Republican primary was held today, would you be voting for Joe Braxton or Max Beauregard?"

Results: 1,500 for Braxton; Sunday, Monday, and Election Day, the phone bank re-called the 1,500 Braxton favorables, reminding them to vote. A total of 1,250 were reached on the re-call.

On Election Day, Braxton wins 2,003 to 1,902. In looking at what the GOTV program cost, Braxton calculates this:

Access to list	\$0
4000 ID calls @ \$.70	\$2,800
1250 reminder calls @ \$.30	\$375
TOTAL	\$3,175

Braxton guesses the GOTV program added 188 votes to his total, figuring 15% of the 1,250 reminder calls actually boosted someone to vote who otherwise would not have done so. He notes that figure works out to \$16.89 per vote. The \$3,175 was only 6% of his \$50,000 campaign budget. More importantly, the 188 votes were the difference between victory and defeat.

EXAMPLE TWO: JANE CLEAVER

Jane Cleaver is running for state senate in a slightly Republican district. Her opponent is an incumbent who's regarded around town as mean and corrupt.

Cleaver plans to raise \$82,000 to run her race; she needs 25,000 votes to win. Cleaver builds her campaign around the maximum Door-to-Door tactic (discussed in the Scheduling section of this CMS manual.) Her media expenses are direct mail, newspaper advertising, and radio.

The Democratic Party sponsors a phone bank for the gubernatorial and presidential candidates and tells Cleaver she can participate for only 25% of the cost, or \$4,000.

Cleaver says, no thanks: that \$4,000 will pay for a mailing to 13,000 women voters—all the women in the swing precincts of the district. She hopes the mailing will add 1,300 votes to her total. The phone bank will add only about one half of that; in addition, she expects the gubernatorial and presidential candidates will go ahead with the phone bank even if she doesn't contribute.

On Monday night before the election, Cleaver supporters hang remember-to-vote door hangers on the doors of 2,000 homes in the two precincts where the Democratic candidate for Governor received over 70% of the vote in 1994. The door hangers cost \$300.

Cleaver guesses the 2000 door hangers added a net of 40 votes to her total. That's a cost of \$7.50 per vote

On Election Day, Cleaver gets lucky and wins 26,507 to 22,064.

EXAMPLE THREE: FRANCIS KELLY

Francis Kelly is running for state representative. Hers is the top targeted race in a state where the Democrats control the House by just two seats. Kelly's budget is \$110,000. She thinks she can win with 9,500 votes.

With a list of phone numbers supplemented by volunteers look ups, she has 20,000 phone numbers of likely voters in her district. The campaign drops one precinct where Republicans never receive 6 % of the vote, and plans to call all the other phone numbers. They expect to complete 10,000 phone calls, knowing from experience to expect nearly half the phone numbers to be disconnected or never answered after three attempts. They want to make the calls in October. By operating their own phone banks, rather than hiring a service, the campaign can give paid jobs to give teenagers from the district. Here's how they decided how many phones and phone callers they needed.

20 calling hours per week: (6:00 p.m. to 9:00 p.m. Monday - Thursday; 1:00 p.m. to 9:00 p.m. on Sunday).

12 completed calls per hour: 240 completed calls per week.

Therefore, 12 phones, operating without a hitch, can complete 11,520 calls in four weeks. But there will be hitches so figure they can make 10,000 calls a month.

The Kelly campaign hires 14 callers per night. That's two more than they need, to allow rest time, unexpected illness, failure to appear, etc. The salary is \$10.00 per hour, or \$11,200 for the whole ID project (20 hours X 4 weeks X 14 callers X \$10).

They buy throwaway cell phones with unlimited local minutes for \$150 per phone, or \$2,100. The phone bank locates 3000 Kelly voters. For the reminder call, the campaign calculates:

12 hours of prime reminder time—eight hours Sunday and four hours Monday. 10 hours of secondary reminder time—Election Day.

(Until recently, Election Day reminders were preferred. But, research shows it's better to begin earlier. Some potential voters don't come home Election Day until after the polls close. They must be reminded the day before.)

Reminder calls can be completed at the rate of 30 per hour. That means the 12 phones can complete 2,400 calls on Sunday and Monday—when people are most likely to be home. Running 12 phones on Election Day is insurance.

Again, using paid callers, the campaign will spend (22 hours X 12 phones X \$10 = \$2,640. Here's what was spent on the phones:

*Cell phones \$2,100
Paid ID calls \$11,200
Reminder calls \$2,640*

The total budget for the phone program is \$15,940 --about 31% of the campaign budget. It's a big chunk of her budget, but with the added boost in turnout, Kelly wins 9,742 to 9,268.

EXAMPLE FOUR: ARTHUR LEE

Arthur Lee is a state representative candidate running in GOP leaning district in a toss-up state during a Presidential election year. He figures he needs about 9,000 votes to win. His budget is \$110,000.

He knows through contacts that the GOP candidate for President is going to ID and turn out every Republican in his district with door knocks and phone calls. His TV budget is going to eat up most of his money so he decides to limit his GOTV program. There are 4,000 phone numbers in precincts where the GOP candidate for the Senate last cycle got more than 75 % of the vote.

Lee hires a phone bank service at \$.40 per call to make reminder phone calls to every phone number in those precincts saying, "On Tuesday, please remember to vote for the Republican candidate, Arthur Lee." 3,000 calls are completed, at a cost of \$1,200.

Lee guesses that the universal turnout calls added 400 votes to turn out, of which he received 280 and his opponent got 120 for a net gain of 160 votes at a cost of \$7.50 vote.

Lee wins a close race, 9,072 to 9,045, so the money was well spent.

EXAMPLE FIVE: SUSAN DITHERS

Dithers is an incumbent member of the Patrick County Board of Supervisors up for re-election in an off year. Her budget is \$180,000. She knows she will have to allocate \$150,000 of that amount to mail and radio, and another \$20,000 to overhead.

She needs 12,405 votes to win. She mines the GOPDataTrust data to determine that of the likely voters in the upcoming election, some 12,000 are Democrat regulars and 12,500 are likely to vote Republican. There are 18,000 independents or voters for whom she has no data.

She has a pool of dedicated volunteers and many of them have smart phones so she recruits 12 of them to call the 18,000 independents. She spends \$1,000 on software that will allow her to use the smart phones to make the calls and hires a staffer for \$3,000 to monitor and run the program. She spends \$500 on gifts and dinners for the volunteers.

The volunteers canvass the 18,000 independents (13,500 households) over the course of 4 weeks, contacting 10,000 of them and getting data from 6,000. Of that number, 2,500 are supportive.

She pays a telemarketing firm to call the 12,000 Democrats regular voters plus the 2,500 her folks have located, to urge them to vote for a cost of \$3,553 ($14,500 \times 70\% \text{ contact} \times \0.35). Her volunteers knock on the doors of her supporters on Monday and Tuesday urging them to vote. Her budget for GOTV is

Software	\$1,000
Staff	\$3,000
Extras for vols.	\$500
Turnout calls	\$3,553
Total GOTV	\$8,053

Dithers stomps her opponent 11,565 to 9,333 owing to an even lower than usual turnout.

If you can, get someone else to do your turnout for you

The Jane Cleaver example illustrates that the least expensive way to do your GOTV strategy is to leave it to someone else to do it for you. Look at the political environment. Are you running with a candidate for governor or senator or president who is well funded? If they turn out their voters, they will be turning out yours, too. Let them pay for it. Before you adopt this strategy, make sure they have a good turnout program; don't assume they do.

Another option—universal turnout

The Arthur Lee example shows that the most inexpensive way to get additional votes is to make universal turnout calls, with no ID calls, in the precincts where you are sure to get 67% of the vote or better. This is the only way you can pick up votes with a paid phone bank and spend around \$10 per vote.

Unfortunately, there are very few precincts where you can be confident, you'll get more than 60% of the vote, let alone 67%. The trick is to find other lists where you are confident of getting 67% or more.

You can probably plan on 70% of your own church congregation to vote for you, assuming that your opponent goes to a different church and lives on the other side of town. They are even more likely to vote for you if someone from the congregation calls and says, "Jane Jones goes to church at Hillandale Baptist, and she's running for state representative. I'm calling members of the church to remind them to vote for Jane on Tuesday."

This church example combines an advocacy message with a turnout call to lists where you should get 70% of the vote or better.

If you have access to a phone bank list from 2014 of people who voted for the GOP candidate for Governor, you can probably assume that your Republican candidate will be getting a vast majority of those people. (Depending on your campaign plan, you are probably counting on approximately 85% of the GOP voters to support you.) This is another list with an advocacy message combined with a turnout call that should be very effective.

In a low visibility legislative or local race, 70% of the friends of your campaign workers at least the friends who are not hard-core Democrats should vote for your candidate.

For example, suppose Linda Williams, a democrat calls 20 friends and says, "I'm calling for Jane Jones, who's a personal friend of mine and the Democrat candidate for state representative. I'd really appreciate it if you'd vote for Jane on Tuesday." Twenty calls like

that would probably add two votes to Jane's total. (This is an example of what Lincoln said about having the doubtful voters talked to.) Linda should be able to complete her 20 calls in about an hour and a half. To get the same two votes, using the phone bank program of the Francis Kelly campaign, would take more than six hours on the phone!

CONCLUSION: GET-OUT-THE-VOTE IN THE CURRENT POLITICAL ENVIRONMENT

During the 1980s the advent of the personal computer changed voter contact dramatically. It became easier to get the list of voters, making a trip to the courthouse to hand copy the list of voters, thankfully, a thing of the past. It also became easier to keep, sort and manipulate your data with the computer in the headquarters taking the place of enormous file boxes of cards.

But in the 1990's the growth of telephone marketing for charities, real estate, sales, etc., increased the number of people who have unlisted phone numbers and the people who refuse to talk to strangers over the phone. That trend has only grown.

By the turn of the century cell phones became commonplace, and in this decade smart phones have accelerated the trend away from land lines and phone banks, making voter contact tougher. Counterbalancing that is the access campaigns now have to predictive dialing and much more sophisticated data on the voters.

Balancing out these factors is the challenge for voter contact efforts.

Chapter Three

Fundraising

Money is usually the most critical resource of any campaign. Like it or not, campaigns can't be successful unless enough attention is paid to fundraising. Enough money can help make up for lost time and/or lack of volunteers.

If there are campaigns for public office, money must be raised to pay for them. What is the secret to successful fundraising?

You have to ask people to contribute!

In fact, studies show that the number one reason people don't contribute to campaigns is that they aren't asked. The number two reason? Potential contributors don't know how much to give. So, you must suggest a range of specific amounts, always remembering to "aim high and negotiate."

Three Basic Methods of Raising Money

1. *Person-to-Person*. Includes personal solicitation of major donors and Political Action Committees (PACs). Person-to-person solicitation, by you and the members of your finance committee, is the most appropriate and best approach to use with major donors or high-dollar givers who comprise the "top" of your donor pyramid. **This is the most cost-effective type of fundraising** (refer to section on segmenting the donor universe).
2. *Events*. Includes breakfasts, luncheons, dinners, receptions, silent auctions, birthday parties, barbecues, home parties, etc. **This type of fundraising is the best method for reaching the mid-level donor**. These contributors tend to want some value for their contribution. To be successful, events must be well organized to be sure that more money is raised than is spent.

Always keep in mind that the reason you're having an event is to produce net dollars. The goal is fundraising, not fun-raising. The difference between the two is the "d" and that stands for dollars.

3. *Direct response (mail and phones)*. Includes reaching the broad base foundation of the potential donor population. **Because of the time and expense involved, these low-donor contributors are best reached**

through direct mail and telemarketing techniques. These programs to cultivate the bottom of your donor pyramid take the most time to produce significant results.

A contributor file and/or access to good lists are critical to having a profitable program. It's important to have a plan to repeatedly send mail or make calls asking for money. Without such a file, direct response fundraising can be a very costly way to raise money. Direct mail and telemarketing programs can work, but they must be started early and implemented according to an ongoing structured schedule.

You may be asking: how does my digital strategy fit into my overall finance plan? Keep in mind, although it's growing, only about 10% of all funds are raised from digital fundraising – and it's only that high because of high-profile Presidential and U.S. Senate races. So I recommend that you use digital to enhance your other fundraising techniques: as a follow up to a direct mail piece (did you receive my letter?); to remind people about an upcoming event (will I see you on March 16?); to communicate with major donors/donor clubs (special newsletter); and of course, personal email requests sent from your organization/campaign to your organically grown list.

Guidelines for Successful Fundraising

Here are best practices to embrace:

- *Ask.* The best approach is the direct approach. Remember, the best way to get money is to ask for it, and the more people you ask, the more money you're going to raise.
- *Plan.* Take time to develop a winning plan with goals and deadlines. Put it in writing.
- *Be specific regarding amount.* Tell potential contributors exactly how much you expect them to give. If not, a potential donor may decline to give because he is afraid he'll give too much or too little. It's better to ask for \$50 and receive \$25 than to ask for \$25 when the donor might have been willing to give \$50.
- *Make repeated appeals.* Give everyone every opportunity to contribute. And, once they have given, ask them to contribute again and again. Do this until they can no longer afford to give or they have reached the legal contribution limit.
- *Create a sense of urgency.* Express a critical need for a potential contributor's financial support and suggest time constraints. Be convincing and express how their contribution can make the difference in your campaign and in their future.

- *Diversify fundraising techniques.* Design your fundraising efforts to complement your political, organizational, and communication efforts. Develop a broad financial base and avoid depending solely on one method to raise all the money. A combination of approaches works best.
- *Research.* The more information you know about a potential donor, the more successful your fundraising efforts will be. Did you go to the same university? The same church? The same community service club? Are you “friends” on Facebook? Contacts on LinkedIn? Information is power, so you need to Google your potential major donors. Do your homework.
- *Stick to proven methods.* Design a fundraising program by using methods that have worked in your district in the past. Be willing to introduce new ideas to the “tried and true” approaches, but don’t depend solely on unproven methods for your results.
- *Get advice.* Ask people familiar with fundraising, perhaps your state party fundraiser or the best fundraisers in your district, to help you develop a comprehensive fundraising plan for your campaign. Conduct basic research and design a plan based on the needs of your political plan and overall budget.
- *Know the law.* Read and understand the requirements of your state and local election laws as they pertain to campaign finances. **Above all else, obey these laws.**
- *Always say “thank you!”.* Regardless of the amount, always thank your contributors and make sure they feel appreciated. Prompt acknowledgement in the form of personalized letters will help develop a habit of regular giving among your contributors. (When asked “why” they no longer give, the number one reason given, “I was never thanked.”)
- *Make your own contribution first.* A candidate’s contribution to the campaign shows potential contributors and others that the candidate seriously believes the race is winnable. Don’t expect people to make the financial sacrifice and give if you haven’t. You can loan your campaign money but know your financial limits – and stick to them.
- *Use flattery.* Potential donors tend to be busy, successful and important people who like to be recognized.

The Finance Chair and Finance Committee

A strong fundraising team begins with a good finance chair. This person must be an aggressive, dynamic person who “likes” to ask for money and has the time to devote to the campaign. The finance chair’s main responsibility is to raise money for the campaign. While it’s the task of the finance director and campaign manager (paid staff) to develop a finance plan, the finance chair needs to buy-off on the plan. A good finance chair is a self-starter who knows the importance of following through and accomplishing things.

The person in this position should be extremely organized, assertive, disciplined, respectable, trustworthy and dedicated. The finance chair cannot be afraid to go out and ask for money!

The finance chair should not be responsible for doing everything; this is why campaigns establish finance committees early on. However, the finance chair should be responsible for knowing what is going on and who is doing it at all times. While the finance committee may be in charge of certain tasks, it is the finance chair that is accountable. Therefore, the finance chair must also know how to delegate and be a strong leader.

Experience shows that people involved in sales make the best finance chairs. Those who earn a living by selling real estate, insurance, stocks, and cars are used to asking people to buy their product. Most won't take "no" for an answer – and that's what makes them so successful! They know how to close a sale – and how to negotiate. And, they're incredibly resilient.

Next to the candidate and campaign fundraiser, the finance chair is the principal fundraiser for your campaign. The primary duty of the finance chair is to recruit and mobilize the finance committee. Besides the aforementioned skills, look for a person with these kinds of attributes.

1. Willing to make a personal financial contribution.
2. Well-known and respected throughout the community/district.
3. Can motivate and enlist others.
4. Personally committed and loyal to the candidate.
5. Has adequate time to devote and (if possible) has no other fundraising responsibilities.
6. Has experience raising money, either for political or non-profit groups.

The most effective finance committees include men and women recruited by using the following criteria:

- *Occupation.* Recruit individuals who can network with their colleagues and peers. Besides your NFIB colleagues, recruit car dealers, doctors, dentists, teachers, etc. Most of these individuals belong to an association and will have access to the membership directory of their colleagues and can work their spheres of influence.

If you include representatives from different occupations for your finance committee, you'll have the added benefit of asking these people to contact their PACs on behalf of your campaign. Many PACs rely on their members back home to determine where to put their money in a race – it's important for your finance committee members to network

with their state and national associations.

- *Region.* Recruit finance committee members by county, precinct or town, and ask them to raise money from that specific area.
- *Interest.* Recruit people involved in politics by specific issue, such as gun ownership, abortion, the environment, home schooling and other hot button topics. In turn, they can raise money from people interested in the same issue.

Set Goals for the Finance Committee Members

Set specific fundraising goals for each member. Depending upon the size of your campaign, each member may be asked to raise anywhere from \$1,000 to \$10,000 or more. Members can reach their goals in various ways: writing a check or making a credit card contribution for \$1,000; finding ten friends to donate \$100 each; asking for money from a PAC of which they're a member; hosting a fundraising event in their home, etc.

Check in with your finance committee members often. **Remember, these folks are volunteers.** If someone isn't reaching his goals because of personal business, you'll have to adjust your plan accordingly. It's better to recruit a finance committee with more members than you may think you need to plan for such emergencies.

Technology has made fundraising much easier because of the ease of credit card giving. Both the Romney and Obama campaigns used "Square" to accept contributions on smartphones.

Contributions taken by credit card can show up in your campaign bank account the next day with just a small service fee. Other companies are now providing credit card processing services, so do your research.

Quick Start Guide for Finance Committee Members

You can't expect people to automatically know how to raise money – training is crucial. Here's a sample "Quick Start Guide for Finance Committee Members" you can use to help your finance team launch their efforts. I used this in a Congressional campaign in Iowa.

Quick-Start Fundraising Guide for Finance Committee Members

- Comb through your Rolodex, Facebook friends and LinkedIn contacts to identify possible donors. Studies show that people are twice as likely to contribute if asked by a friend.
- Your sphere of influence is larger than you think: who do you know from church, service clubs, veterans' organizations, professional membership organizations? The worse someone can tell you is "no"! (And it may not mean "no" tomorrow!) The more people you ask, the more money you'll raise.
- Emails (approved by the campaign because we have to abide by Federal Election Commission laws) are a great way to open the door to a conversation about contributing to your candidate's campaign. We'll provide samples to help you.
- Your phone call is crucial to your NAME OF CANDIDATE/ORG's success. Your fundraising totals will go up five times if you pick up the phone and make a personal connection. It's a lot more difficult to turn down someone during a phone call than it is to ignore an email.
- As you're connecting with potential donors, let us know if the candidate needs to join you for a personal visit or needs to make a phone call to answer questions or close the deal. We'll make that happen!
- There are many techniques to help you reach your fundraising goals:
 - You and your spouse can each contribute \$2700 in the primary and in the general. (\$5400 total per person).
 - You can reach out to your organization's Political Action Committee and ask for their support. Many PACs will follow the recommendations of their members.
 - You can host a house party in your home.
 - You can send an email or letter to your contact list (again, the campaign will help you with messaging.)
 - You can schedule time with potential major donors and ask NAME OF CANDIDATE to accompany you.

Personal Solicitation:

How much time should a candidate spend raising money?

To be successful, a candidate must devote a significant amount of his/her time to fundraising.

Fundraising must be an integral part of the candidate's daily schedule from the beginning.

Always remember the secret to successful fundraising: surveys show people will contribute to the candidate of their choice, but ONLY if they're asked. In fact, the number one reason people don't contribute to non-profits or political campaigns is that they weren't asked. Number two? They don't know how much to give. Be specific in your asks. Monetize everything.

Fundraising is no different from selling a product—confidence is the key to success. If your candidate doesn't believe in herself, no one else will either.

Take a suggestion from the master of promoting self-confidence, Dale Carnegie. To paraphrase, Carnegie advised his students to meet strangers with the enthusiasm of a puppy dog. Now, we don't advise that you lick the faces of potential contributors, but enthusiasm and self-confidence will make your candidate a top-notch fundraiser!

One-on-one solicitation is the *most cost-effective* way to raise money in a relatively short period. If done correctly, this is the single best method to raise high dollars quickly and to expand your circle of supporters. The more time the candidate spends personally asking for money, about 35- 50% of their time, the more money the campaign will raise. This time must be built into the candidate's schedule. Start out with a breakfast meeting with a potential big donor, schedule ample call time in the morning, add a lunch fundraising event, hop back on the phone in the afternoon and end up going to a house party as a supporter's home in the evening. It's hard work, but it must be accomplished every single day—especially at the beginning of a campaign.

Just as the name implies, person-to-person solicitation involves the candidate, or one of the finance committee members, asking a potential contributor for money. This is the most personal form of fundraising and therefore is sometimes considered the most difficult. Many people don't like to ask for money; however, practice, does make it easier. In fact, rehearsing with the help of a video camera is an excellent way to improve skills and build confidence.

Advantages of one-on-one fundraising:

1. Turnaround time is short, sometimes immediate.
2. Return is high and result can be immediate (especially with credit cards).
3. The cost is minimal.

Develop a script to help practice the four steps of asking for money:

- *Your greeting.* Look the contributor straight into the eye, offer a firm

handshake and smile. Have the confidence of an Olympic star. You have but 21 seconds to make a first impression. Be glad to be there!

- *Make small talk.* It's tougher to turn down a friend than a stranger, so your goal is to make every potential contributor your friend. Do your research – find out what you have in common with the contributor – did you go to the same university? Are you both members of a service group? Do your kids go to the same school? Do you have mutual friends? Personalize your conversation as much as possible. Be observant if you're in the prospect's office: acknowledge family photos and favorite sports teams.
- *Perfect your sales pitch.* You must be able to articulate why you're running, how you're going to win, and who's going to vote for you. Failure to answer these simple, but fundamental, questions can mean your campaign is in real trouble.
- *Closing the deal.* For most candidates, this is the hardest part—asking for a specific contribution for the campaign. No one likes rejection, especially candidates. It's imperative that you don't take it personally. It's worth repeating: the number one reason people don't contribute to a candidate is because they weren't asked. The number two reason? They don't know how much to give, so offer a specific amount, and tell the contributor what the money will be used for: "I need \$1,000 to pay for the 300-yard signs I need to order."

The major donor level is whatever you determine it to be for your campaign and your district -

\$250, \$500, \$1,000, \$2,700. Be sure to think big – your way to ask these people to give the most they can. And remember to ask a spouse to give the maximum amount as well. In a Federal race an individual can give \$2,700 per election (primary, run-off, general). On top of that, the Federal Election Commission (FEC) allows a couple to spend up to \$1,000 each to host a fundraiser for the campaign in *their home only*. The contribution can include postage, printing, entertainment, food, and refreshments. This home party exemption can be an important part of your fundraising strategy for your maxed-out donors. For additional campaign donation limits, see Appendix A for 2017-2018 FEC limits. (www.fec.gov).

You won't insult people by asking them for more than they may give. In fact, studies show you actually compliment potential donors by asking them to be on a higher financial level than they may consider. Remember the importance of flattery. Don't run the risk of insulting a potential donor by asking for too little.

Prioritize which potential contributors will require a personal visit. Ask your finance committee members to help prioritize these visits. Answer these questions:

1. Which contributors will give to your finance committee member without a

- visit from the candidate?
2. Who should accompany the candidate on the personal visit?
 3. Who will follow up to collect money (in a perfect world the candidate would walk out of the meeting with a check or a credit card contribution)?
 4. Who will make sure a personal thank you note is sent (preferably handwritten)?

Make sure the candidate is as comfortable as possible – provide soft drinks and snacks – and start candidates out with some “softball” requests. It’s motivating for the first calls to be “easy sells” – the candidate will gain confidence to continue his efforts. Again, practice with a script to get started. Remember, raising money is no different from selling a product. The candidate’s self-confidence is essential – **if the candidate doesn’t believe in herself, no one else will**. Keep in mind that insurance salesmen are happy if only two or three of every ten people they contact buys their product. You can increase those odds with good research before starting to make calls.

If you decide some people can be solicited by phone, prioritize the list. Sometimes it’s easier to have the finance director help the candidate make calls. The finance director can place the call and then hand the candidate the phone. Some candidates are motivated by a fundraising growth chart showing their success (such as on PBS marathons).

What kinds of people tend to give to political campaigns?

1. Family and friends
2. Campaign and finance committee members, and their friends and family
3. Professional, business, civic, and social contacts
4. Members of like-minded organizations
5. Groups and individuals interested in election results
6. “Habitual” campaign and/or Party contributors
7. People who dislike your opponent

Why do people donate to campaigns?

People contribute for different reasons, and a good fundraising plan factors in all of them. Here are some major reasons why people contribute to a campaign:

1. *Friendship* . A personal relationship with the candidate, campaign volunteers, and/or committee members.
2. *Habit*. A regular practice of giving to candidates, political parties, and other worthy causes.
3. *Reward*. A sense of reward for participating or a material reward like a membership card, photo, or lapel pin.

4. *Access*. The perception of enhancing opportunities to communicate with the candidate.
5. *Change policy*. The desire to take an active role in making a difference.
6. *Fear*. A negative motivator based on your opponent.
7. *Covering political bases*. Making sure you reward your political friends.
8. *Asked*. Remember, this is the #1 secret!

Why don't people contribute?

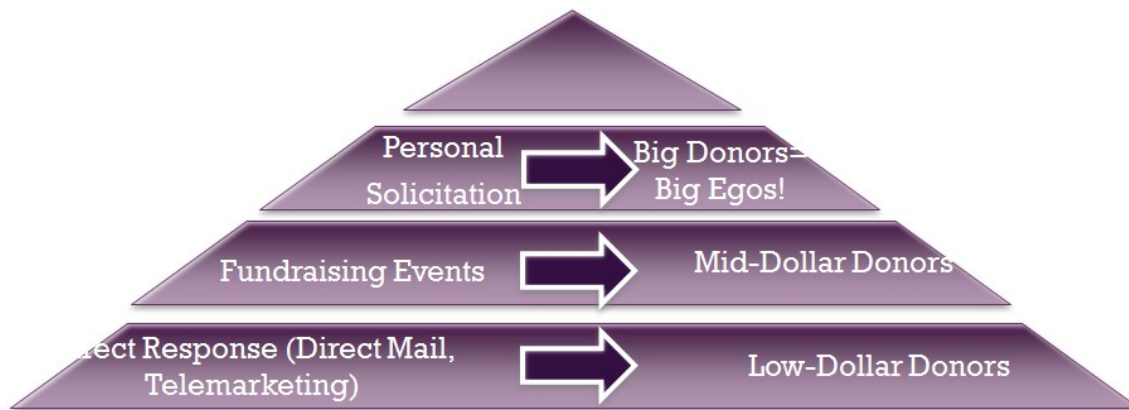
1. *Not asked*. Willing, but are overlooked
2. *Appeal not personalized*. Solicitation is too generic.
3. *An unspecified amount*. Don't know how much.
4. *Inexperienced giver*. Don't know how.
5. *Offensive appeal*. They feel used or unappreciated.
6. *Vague appeal*. Unsure what the money would be used for.
7. *Unconvincing appeal*. Question if campaign is winnable.
8. *Wrong person asked*. Solicitor is not a peer.
9. *Ungrateful*. Weren't thanked the last time they contributed—Totally inexcusable!

Anticipating these common negative reactions to fundraising appeals can help you develop a strategy that works. As you can see, most of the reasons people don't give can be "fixed" or avoided altogether. You need to know how to reach each type of potential contributor with the "correct" appeal to make them feel motivated and committed enough to give money.

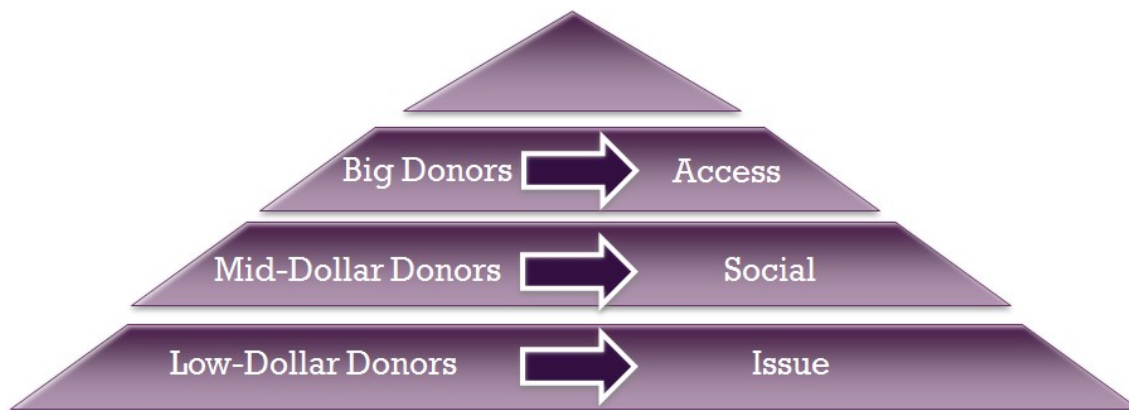
What does "segmenting the donor universe" mean?

To develop an effective fundraising strategy, you must know and understand your potential contributors. You must know the amount a person is capable of giving and the best method of motivating him to write a check. This is called "segmenting" the market.

Think of the potential donor universe as a pyramid. Divide the pyramid into three segments to represent the various levels of giving. Like a pyramid, the ideal and well-developed donor universe has more low-dollar contributors at the bottom and fewer high-dollar contributors at the top. The following diagram represents the concept of segmenting your donor universe with a new caveat: social media and marketing can be used to enhance fundraising on all levels:



Once you segment the potential donor base, you can determine the best tactics to reach those who are capable of giving at the various levels. There are three major methods of fundraising activity, each of which corresponds to a level in the pyramid pictured below:



The definition of a major donor changes from campaign to campaign depending on the size of the campaign and economic factors. Look at historical precedent and the current environment to arrive at the best figure for your candidate or organization's situation. A major donor in a city council race in rural Nebraska may be a \$100 donor; in a Congressional race, it's anyone who gives between \$1,000 and \$2,700.

Developing a Finance Plan

In simple terms, the finance plan maps out the efforts to raise the money that meets the cash flow requirements of your overall campaign plan. To develop a finance plan, you first need two basic things: a political plan and a campaign budget.

Winning campaigns follows the three-step process:

1. *Political Plan.* Determine what, why, how, and when you want to accomplish the political activities of your campaign. The political plan spells out what you have to do to win.
2. *Budget.* Project cost estimates for each component of the strategy along with a timeline for these expenditures. The total shows the minimum amount of money the campaign will need.
3. *Finance Plan.* Develop a comprehensive written document that outlines your strategy to raise the dollars necessary to meet cash flow requirements. Include each method of fundraising based on your research about historical precedent, the current environment, and available resources. The fundraising plan shows how you will raise the money in time to spend it.

Consider developing finance plans based on three different budgets (high, medium, and low). Developing these plans ahead of time will eliminate some stress in the future if you don't reach all of your fundraising goals. Because, in the real world, you may have to modify your campaign plan to match your fundraising capability. However, try to avoid the situation where you are forced to consider curtailing an important political tactic due to a lack of funds. A good finance plan comprises the ideal combination of programs, which will produce the money needed to full implement the winning strategy. **Avoid running into debt.** The best finance plan is a detailed strategy complete with goals, objectives, and tactics for implementation.

Why should I have a written plan?

Year after year, post-election analysis repeatedly points to the important correlation between good plans and winning. Here are just a few reasons why putting a plan in writing is critical:

1. *Road map for success.* A plan sets out goals and deadlines. With the potential to have so many people involved, it's important to operate off the same document.
2. *Benchmark for progress.* A plan should be continually reevaluated to see what's working and what's not. Since the plan isn't written in stone, it can be adjusted accordingly.
3. *Defines responsibilities.* A plan also helps determine the job description and workload for everyone involved in the campaign. With a plan, you can see in advance the times when you need additional help to accomplish necessary tasks.
4. *Establishes credibility.* Finance Committee members, major donors, political leaders, and PACs will look for evidence of a written plan as a sign of a credible, professional, and well-run campaign organization. People need to

believe they are making a good investment.

5. *Provides fundraising tools.* Contributors want to know exactly what the money will be spent on. The plan provides a variety of programs that can be used in direct mail letters and in discussions with potential major donors.
6. *Protect you from the “what ifs. . .”.* Often during the height of the campaign, many ideas are suggested with the best of intentions. However, a plan based on research and careful thought can protect you from having your plans changed and funds diverted during the height of the campaign chaos.

How can I project fundraising goals for my campaign?

History is one key to projecting how much money can be raised in a district and what methods will be most successful. Before you write a plan, examine your area's fundraising history. This evaluation should give you a good idea of who the contributors are and how best to approach them.

Realize that you don't have to stick to only those fundraising methods used in the past but researching the past will give you a basis of comparison to design your fundraising tactics to be the most effective. You can see what has worked, what hasn't, and why.

Remember to calculate the difference between **net** and **gross** dollars. Gross profit is the total amount of money raised; net profit is the amount raised after all expenses are paid. The only dollars you can spend are net dollars.

When you conduct your research, ask the following questions:

1. *How much money has been raised in past campaigns?* Take a look at past FEC reports (www.fec.gov) for federal campaign and state/local reports to determine how much money former candidates have raised. Who raised the most? Who raised the least? What is the averaged? This information will give you a benchmark and an idea of how realistic your goal is.
2. *What techniques did these organizations/campaigns use in the past and how much did they raise with each technique?* This should tell you what the traditional means of raising money are and which have been the most successful. Your research in this area should go as far as finding out why certain techniques worked in the past and why others didn't. This way, you can avoid mistakes of the past and begin to get an idea of which techniques might bring in the most money in your community.
3. *Who raised the money in the past?* Answering this question should allow you to identify the major fundraising talent in your area. Look for both the staff fundraisers and finance committee member types. Political fundraisers from past campaigns can tell you how to avoid the mistakes they made and how

they achieved their success. Finance committee members can probably help you or recommend others to solicit.

4. You'll also want to find out who raises the money for area charities and educational institutions. Who makes things happen in your community? Charitable fundraisers can tell you how the money community in your area behaves and give you names of potential contributors.
5. *How were past programs structured?* This answer could save you a lot of time. If other programs were successful, you may want to duplicate their efforts.
6. *What laws affect my fundraising program?* Research and list all state and/or federal laws that apply to your fundraising efforts. Be sure to review all aspects such as corporate contributions, spending and contributing limits, reporting requirements, personal money, loans, cash, and "in-kind" contributions. You can call your state party to seek information about attorneys who specialize in campaign finance law. Federal candidates can visit the FEC website (www.fec.gov). Compliance is critical!

Here are the integral components of a finance plan:

1. *Summary sheet.* This first item is a single page which gives you a "bird's eye view" of the finance plan. Include short paragraph descriptions of each fundraising programing, showing both the gross and net amounts for each, in addition to the total financial goals and costs. Computer-generated pie charts will clearly show where you predict the money will come from.
2. *Narrative.* This section is the substance of the plan and should include a detailed description of each fundraising program (i.e. candidate solicitation, finance committee, major donor program, events, direct mail, telemarketing, and digital). Important information for each program should include the following: date, explanation of how the event or committee is organized, theme of the direct mail package or phone script, number of invitations or packages mailed, anticipated gross income, costs, and project net. **Make sure your projections are on the conservative side but be realistic.** It's always better to raise more money than expected. Be sure to include all costs for each program (direct and indirect). The narrative should be very detailed. If you have a change in personnel, someone can pick up the plan and continue its implementation.
3. *Income worksheet.* Those most functional part of the finance plan is the listing of every fundraising activity, including both gross and net projections for each calendar month. You can easily create a budget document using Microsoft Excel or numerous other inexpensive commercial programs. The total of the "gross" columns for all months combined is your overall fundraising goal. The total of the "net" columns tells you how much spendable income you'll have. **Remember, you can't spend gross dollars, only net.** Since this is a working

document, version control will be critical. Ensure you establish early on who will have permissions to edit the document and who will have “view only” rights. Fill in the “projected” amounts initially. As you progress through the campaign, fill in the “actual” amounts. Utilizing the “projected” and “actual” columns is critical to fine-tuning the plan.

Any discrepancy between these two will immediately alert you to a potential shortfall or excess situation. A finance plan isn’t written in stone and should be adjusted according to change in the political environment.

- *Calendar* – Create a calendar page for each month. Mark an entry for the “drop” date of each mailing, every finance committee meeting, all special events, telemarketing blitzes, email appeals and other goal deadlines. This will help you keep on track and will also demonstrate any instances where you might be trying to attempt an unrealistic amount of fundraising activity within a certain time frame.

If several people are involved in implementing segments of the finance plan, make this information available to them, but don’t put this valuable information out on display for all to see. **Stay on schedule.**

1. *Job descriptions.* Write brief job descriptions for each member of your finance organization: the finance committee chairperson, finance committee members, the finance director and other staff members, where appropriate. Refer to this when recruiting individuals to raise money. You want them to realize exactly what will be expected of them.
2. *Cash flow chart.* You should already have some idea of how much and when you will be spending money to implement the political plan. This information is a given and should be filled in on the cash flow chart on the expenditure line before designing the finance plan. Now, enter the projected net monthly income from the income worksheet (see Appendix B Campaign Income Worksheet).

In a best-case scenario, the monthly net income of the finance plan will cover the anticipated monthly expenditures of the political plan. If not, go back to the worksheet and rethink your fundraising programs. Adjust the finance committee’s goals, event dates and direct mail schedule to increase the net income to make sure that all political expenditures will be covered.

This is one of the most difficult steps in writing the plan. Usually, the income and expenditure cash flow won’t match up perfectly on the first draft. Several revisions to

this finance budget are usually necessary.

To summarize, be sure your finance plan includes:

1. The total amount of money that needs to be raised.
2. Dates when the specific amounts are needed.
3. A list of all of your fundraising efforts.
4. A calendar and/or timetable for implementing the plan.
5. A list of all materials needed to accomplish your fundraising efforts such as pledge cards, fact sheets and sample invitations.
6. A fundraising budget (which combines the income worksheet and the cash flow chart). (See Appendix B for sample)

Who writes the finance plan and how?

Who writes the plan and how it is written are just as important as the plan itself. Another secret to successful fundraising is to have all major players feel like it is “their” plan. In most campaigns, the finance director should be the driving force of writing this plan.

Identify the key players in your organization and try to plug them into the planning process. Hold a meeting where all the key players are invited to brainstorm. Have a small group develop a draft plan.

Present the draft plan to the larger group, explaining each program and justification for anticipated revenues, etc. Win their approval. Remember, the more people who feel they’re involved in writing the plan, the more people who have a stake in the plan’s success.

Before sitting down to work on the first draft, collect as much historical information as possible (such as how much was raised in the past and how). In addition, search out the availability of other fundraising lists. Note commitments from speakers, elected officials, hosts for home parties, etc. Any research or information is most helpful in assembling an accurate plan.

Political Action Committees

Political Action Committees (PACs) are the political arms of labor unions, ideologically focused groups, business organizations, corporations, membership associations and elected political leadership.

If your candidate is challenging an incumbent, you'll find many PACs are reluctant to

donate to the campaign. Alienating an incumbent and/or risking limited PAC funds on a challenger make these PACs hesitate from getting involved early. You'll have to make the strategic – and political – decision whether to solicit contributions from PACs. If you're running against a well-financed incumbent with a high percentage of out-of-state PAC dollars, you may decide to make this an issue in your race.

How can I determine which PACs might donate to my campaign?

No campaign can expect to receive funds from every PAC. In fact, it's not realistic to even consider asking all of them. Before any effort is made, develop a list of targeted PACs that could contribute to your campaign.

Most conservative state legislative and local candidate looks to business and association PACs, while liberal candidates look to labor PACs. Also consider PACs who agree with you ideologically. Research which other state PACs have a history of contributing to candidates like your own. Also factor in unique characteristics of the campaign to expand the core groups of prospects – if you're a doctor, reach out to the AMA (American Medical Association). Do your research by visiting www.fec.gov.

If you're running in a state race, most states require PACs to register with the state's election commissioner or other governing authority and to file periodic reports detailing their contributions. Check to see if your state maintains a list of registered PACs and research their financial disclosure statements.

Also research like-minded candidates to see which PACs have contributed to them to help you build your prospect list. If your state doesn't require PAC registration, then check all the various state trade associations such as the builders, doctors, dentists, hospitals, etc., to see if they have PACs. Research registered lobbyists in your state and their client lists.

Information to gather about each PAC

1. PAC name, address, telephone number and email address.
2. Name of the PAC director, representative, treasurer and primary contact person.
3. Group represented by the PAC or the issues with which the PAC is concerned.
4. Names of any affiliated PACs.
5. Average contribution amount.
6. Schedule of meetings to determine distribution of PAC funds.
7. Names of supporters who are affiliated with the PAC.

Remember, the more you know about a PAC, the easier it will be to determine the best approach to asking for support. You don't want to talk about gun issues with a restaurant

owner whose major concern is the current minimum wage. Use Google to do preliminary research about what issues are important to the organization—and visit their websites.

Once you've developed this list, the next step is to determine which PACs may have particular reason to give to your candidate. Some possible reasons include:

- The PAC has a business in your community, district, state or region.
- The association has PAC members in your area.
- You have a supporter who is influential within the PAC.
- You are a part of the profession represented by the PAC.
- The PAC shares your view on a particular issue or group of issues.
- The PAC would like to see your opponent defeated.

When you've developed a PAC list, segment the list into the following four categories:

1. PACs that you believe will give to you.
2. PACs that may give to you.
3. PACs that you have limited information about and have no idea as to their interest.
4. PACs that have given to your opponent in the past or PACs that have different stands from your own. These PACs will definitely not give to you.

Basic research will give you the important information needed to prioritize the PACs based on the likelihood of their giving to you. By prioritizing, you'll maximize your efforts and avoid wasting time and postage money.

Put together a PAC Kit

Once you've determined which PACs to solicit, you need to assemble a sales package that outlines who you are, what you stand for, where you're from and why you are going to win. This package is much like a corporate annual report for stockholders or a press kit for the media and can be modified for use as a marketing kit for your finance committee members.

Furnish as much information as possible to your targeted PACs. Never assume that PACs have all the facts. Make it easy for them to decide to give you money by giving them the research they need.

However, include nothing in this package that could cause problems if it were to be widely distributed. PACs don't operate in a vacuum. They are in contact with more than one candidate and they communicate with other PACs to compare notes. Your PAC kit may end up in your opponent's hands.

Compile this information for a PAC kit:

- *Cover Letter.* Include a letter, signed by the candidate, telling about your background, why you're running, why you expect to win and why you need PAC support. Be straightforward and honest and be sure to ask for the PAC's support and contribution.
- *Narrative biography.* Tell PACs about yourself expanding on information that you mentioned in your cover letter. Be sure to include accomplishments. This is your opportunity to tell your story and to make a connection to the PAC director.
- *District profile.* Provide a background description of the district, describing industry, geography, and the people who live there. Include a map to show district lines and location within the state. Also include recent voting results from federal, state or local races for the district to make the case that you can win.
- *Campaign profile.* Give a brief description of the campaign organization that includes your campaign committee name, address, cell phone, office phone and email address. Include the names and bios of key team members and a brief and generic outline of the budget. (Be careful here because these PACs may support the opponents and could easily give away your game plan). Try to show the PACs that their money will be spent wisely.
- *Issue profile.* Include a summary of your positions on relevant major issues and how those positions affect the people and industry in the district. It's preferable to limit the issues to three or four key ones.
- *Voting record.* If you're an incumbent, include a summary of your voting record and key committee assignments.
- *Opposition research.* If you're working for a challenger candidate, research the opponent's record. Include any weaknesses, poor voting record, missed votes or any low ratings by special interest groups. Show why you can beat the incumbent. Again, don't assume PACs know the bad votes or positions of your opponent.
- *Favorable survey results.* Include survey results that show this is a winnable race.
- *Press.* Include good press you've received and negative press about your opponent.

- *Endorsements.* Include key endorsements from opinion leaders and elected officials and other PAC endorsements, but don't include contribution amounts.
- *Campaign material.* Sample campaign material should also be put into this package. This will give the PAC some idea of how you approach voters.

Present your material in a folder with inside pockets. Put the campaign logo (either a lapel sticker or a bumper sticker) on the front to identify the campaign. Create a PDF version that can be easily emailed to PAC contacts.

Follow up with targeted PACs

Make sure each targeted PAC receives a copy of the package in the mail or via email; hand-deliver a copy during one-on-one meetings. Allow enough time for the kit to be received, and then call the contact person to make sure he received it.

If possible, schedule an appointment with your targeted PACs. After you've set up a meeting, be prepared to take questions from the PAC representative or the PAC steering committee. Research the PAC and practice your answers before the meeting. Never lie or mislead a PAC on your views because sooner or later representatives will compare notes with another PAC and you've lost their trust. Don't be concerned about knowing the answer to every question—the PAC person is the expert on relevant issues, not you. It's better to be honest and ignorant than appear wishy-washy. It also gives you the opportunity to learn more about their issues. As a follow-up, send a letter to the PAC again asking for support and thanking them for meeting with you.

Create an email list of key PAC contacts to keep them updated about your progress. Remember, you're their researcher and it's your responsibility to keep them up-to-date with current news.

As you are building a team, you may consider hiring a PAC consultant to help market your candidacy. Keep in mind that these hires are facilitators, not magicians, but can help open doors for you. They can organize PAC fundraising events and schedule key meetings.

Events

Special events can raise significant amounts of money and be a lot of fun, too. However, you must consider both the advantages and disadvantages of fundraising events and address both in your planning.

Advantages of holding fundraising events

1. If done correctly, events can raise large sums of money in a relatively short period.
2. An event can be a highlight of your campaign, generating momentum and attracting media attention.
3. Events can be used to reward major donors by giving them special seats or a special reception and photo opportunity with the speaker.
4. Events give potential donors a specific deadline to send contributions to the campaign.
5. Events can build your list of contributors – people you can contact for additional appeals.

Despite these advantages, there are many pitfalls to holding events to raise money. First, it often takes a minimum of 30 days and a lot of organization to pull off a successful event. Second, the success of your event is dependent on volunteers to serve as your sales force. Remember: ticket sellers sell tickets, not fancy invitations. You must have friends selling tickets to those in their networks. Third, the campaign risks losing control of the event; costs can easily get out of control and diminish the net profit.

What kinds of events should I consider hosting?

1. *Dinners*. Both formal, seated affairs and informal, buffet-style with open seating. This is your most expensive option.
2. *Receptions*. Hosted/No-Host, pre-dinner/in-lieu-of-dinner, and multiple tiers. This is a more cost-effective option.
3. *Breakfasts/Luncheons*. Held around the district to include different groups, this is a good way to raise money among targeted coalitions. Your overhead will be lower.
4. *Home parties*. Best for keeping costs low and good for gaining new contributors (refer to section on Hosting a House Party).

When deciding the type of event to hold, keep in mind these major questions:

1. *How much money do you need to raise?*
2. *What group do you need to target?*
3. *What kinds of facilities are available for what price?*
4. *How many volunteers can you recruit to generate attendance and raise money?*

Choose the event that will maximize the resources you have available, will make money and promote your candidacy. Use your imagination to personalize the event for the people who contribute and attend. You want people to enjoy themselves. But try to keep it simple—events take a lot of staff time to make them successful.

Use “tiered” events to raise even more money

“Tier” your events to attract several different levels of donors. “Tiering” an event allows you to secure the bigger contributions you need for your campaign to survive, while enabling more people to attend at a lower dollar level. Here are some examples of how to tier ticket prices:

Ticket Price Tiers

Two Tiers

5:30 – 6:30 p.m.: \$100 - Tickets to general reception.

7 p.m.: \$1,000 - Tickets to formal, seated dinner (includes admission to general reception)

Three Tiers

5 p.m.: \$2,500 – Tickets to VIP reception with photo opportunity
5:30 p.m.: \$500 - Tickets to general reception
6 p.m.: \$100 - Tickets to barbecue

When you create a “tiered” event, you’re essentially holding several events in the same time frame. Coordination and organization is key. You want to be sure people who pay extra money feel they have received extra benefits. But at the same time, you don't want lower priced ticket- holders to feel mistreated.

Should I have a speaker?

Give much thought before you decide to invite (and pay for) a guest speaker. Many campaigns choose not to have a speaker at all, but instead sell the event for a specific money-raising purpose or theme.

A speaker can often cost a great amount of money, when items such as honoraria, airfares, hotel and ground transportation are totaled. These costs can subtract substantially from the net income of an event. Unfortunately, many people believe they can't have an event without a "famous name." This belief is unfounded.

Speakers don't guarantee success: an outstanding ticket selling committee does.

Recruiting ticket sellers – the key to successful fundraising events

Recruit ticket sellers just as you would for your finance committee:

- By occupation
- By region
- By interest area

Once on board, give committee members an individual dollar amount goal or give them a specific number of people to contact (will you call these 10 individuals?) By setting achievable goals with realistic deadlines, you can help the committee members be successful. If the goal is too large, you've set the members up for frustration and potential failure, and they may never help you again. These people are volunteering their time and sharing their contacts; they need to be encouraged and rewarded.

To promote a cohesive, motivated team, hold regular meetings of the sales force, keep in touch weekly by phone and more often via email. Often it can be helpful and fun to set up an incentive program and reward the person who raises the most money. Introducing the speaker, sitting at the head table or getting a special photo taken with the candidate and political leaders are options. Competition among committee members is both healthy and productive.

Consider fundraising receptions rather than sit-down dinners. You'll save a lot of money.

In the past, most fundraisers were seated dinners. Now, contributors prefer receptions for several reasons including the freedom to stop by and leave, the opportunity to mix and mingle and the shorter political speeches.

If you're planning a dinner, keep in mind that these involve greater costs and lengthier planning than receptions because meal costs, accompanying overhead, and larger spaces are all necessary. However, sometimes dinners are appropriate and work well for the situation.

To hold a dinner, you first must find a location, such as a restaurant or a hotel, to accommodate the size of your crowd. Second, you must negotiate a reasonably priced menu and factor this cost into the price of the event. In areas where there is more than one hotel or restaurant, ask them to bid on the project.

Besides recruiting a Host Committee, a more prominent name for your ticket sellers, you'll need one person, usually your finance director, to be in charge of approving all expenses and keeping with in the set budget. Assign other staff and volunteers can be

assigned to specific responsibilities such as registration, seating arrangements, decorations (kept to a bare minimum), head table assignments and developing a line-by-line schedule of the evening that can withstand the bustle of noise of waiters serving and clearing tables.

Overall, a reception is far easier to produce than a dinner, but often the reception ticket price will be lower than that of a dinner. Profits will still be higher for a reception because expenses are limited. The reason receptions are easier is simple: arrangements are more flexible regarding the size of the room, guaranteeing how much food and beverage are consumed and seating limits.

Specifically, while a dinner may cost \$50 to \$175 per guest, a reception frequently can be held for costs under \$30 per guest. When you multiply these figures by hundreds of guests, the difference is substantial. Remember to check the law regarding in-kind contributions and reporting procedures.

Be creative: you can save substantial money by looking at other places besides hotels and restaurants to hold events. For instance, you can purchase soda by the two-liter bottle at the grocery to serve guests instead of paying \$5 or more per glass at a cash or open bar. Bed-and-breakfasts and historical homes are interesting places to hold events and save you money. This is a good way to hold down catering costs – you're not charged a "per-person" cost like you are at a restaurant or hotel. You simply provide a set budget to a caterer.

How can I build attendance at my event?

You want to invite as many people as possible to participate in an enjoyable experience. You want these contributors to be inspired so they will give again and again. There are numerous ways to find these potential donors:

1. *Use historical data.* Find the lists for any events held under similar circumstances in the past, for events with the same speaker, for events for the same type of campaign, and of course, for events in the same town or setting. However, do NOT "borrow" donor lists of other campaigns without permission, preferable written—it's a violation of FEC law to use personal donor information taken from filings. Connect with past candidates and supporters and network your way to building a list.
2. *Build an audience around the speaker.* Appeal to an audience that is appropriate for the speaker. If the guest is a nationally known business expert, connect with local business owners. Target!

3. *Personal recruitment.* The best form of recruitment is friend-to-friend, neighbor-to-neighbor and colleague-to-colleague. Think how fast news travels on Twitter and Facebook. After all, these people listen to each other. Expand your sales force to include more people with diversified interests.
4. *Appeal to known or past donors.* Overall, however, the most common audience to whom invitations should be sent are current and past donors.

A word of caution: events don't sell themselves. Your ticket-selling committee is critical to the success of your event. Phone calls and/or personal visits will close the deal, not a fancy four-piece invitation or repeated "Likes" on Facebook.

Generating media coverage

Fundraising events can generate earned media coverage. Before you publicize the event to the media, your campaign team has to make the political decision of whether or not to invite reporters. However, if you don't invite the media, you won't get any coverage—or you may not get the coverage you'd prefer.

When you invite the media for a fundraising event, you need to manage their expectations. Always underestimate the number of attendees, not overestimate. It's better to downplay the expected results.

Also, the type of event can help determine whether to include the media. It all depends on how you sell it to the media. A high-dollar event with a well-known speaker covered by the media could give your campaign credibility. A barbecue at \$20 per person with a large turnout can earn your campaign positive headlines as well.

You need to choose not only whether to have media attend your fundraising events, but also their level of access. You can invite them to a special press conference before the event. This allows you to control the situation and protect the privacy of your contributors.

To make the event a publicity success, the press secretary must attract a positive media response. Ensure wireless internet and other technological needs are available. And always remember to provide snacks and drinks.

What to do after the event

Once an event is over, the work is not complete. Some of the most important work follows an event. Here are some items to remember after the event:

1. *Collect all the money committed for the event.* Although you try to avoid it, many people promise to pay and don't. Set up a system where you can easily accept credit card payments using Square or a similar system. Better yet, create a secure link on your invitation page so people can pre-pay. You need to have your host committee get all the pledges translated into cash in the bank. Don't let anyone off the hook!
2. *Send out thank you notes to everyone.* Anyone who contributed or helped in any way should get a personal thank you note from the candidate. Thank you notes are very important, especially if the event was high-dollar. It takes very little effort and isn't expensive. Remember to include the cost of thank you notes in your budget before the event. Thank all donors and volunteers for their generosity. It will go a long way toward garnering repeat support next time. Also, thank the people who helped you at the hotel or facility. Further, thank you notes dropped quickly after the event show the campaign is organized and grateful.

To maximize collection of money, the campaign can send out four versions of thank-you notes:

- Those who attended and paid.
 - Those who attended and need to pay.
 - Those who couldn't attend but contributed.
 - Those who pledged for the event, but didn't attend (this is the toughest group to collect from, but it's worth the effort).
3. *Pay your bills.* Pay your bills in a timely fashion. Most vendors require a hefty deposit (50%)—and because political campaigns are considered bad credit risks, many won't extend credit to them.

Direct Mail Fundraising

Direct mail is still one of the best ways to provide a steady cash flow to your campaign or non-profit organization. If done correctly, direct mail can raise money while increasing your visibility and support. However, direct mail can be a time-consuming and sometimes costly method of raising money.

Most state legislative and local challenger campaigns don't have the time or staff to invest in an aggressive direct mail program. It takes time to develop the strategy, copy and design for a successful package. If this is your first campaign for state legislative or local race, definitely start a mail program, but don't depend on it as a big source of revenue. If you have good lists, and have the time and money to develop a good package,

direct mail can be profitable.

Normally, direct mail contributors comprise the bottom of the donor pyramid and are not the same people who give through special events or major donor programs. Direct mail gives lower dollar donors the opportunity to make a difference by contributing to your campaign.

It's important to realize that direct mail is a communication from one individual to another individual. The letter should be personal and written just as if you were talking to the recipient. This is not the time to pull out your grammar books! Great copy should be a conversational piece and not a PhD dissertation. The letter should be urgent, emotional, and describe to the donor exactly how his contribution is going to make a difference in the world. That, more than anything else, is what makes the letter work.

Many people will complain that they get too much mail. This is just a given. But also remember that direct mail raises millions and millions of dollars a year. Campaigns wouldn't do it if it didn't work. The key is to present your case clearly and to show the donors how their gift will make a difference. (Are you catching onto the trend here? Much of this is about telling the donors how their money will make a difference! That can't be emphasized enough!).

As you plan your direct mail fundraising piece, remember to follow all campaign finance laws, especially about disclaimers. In addition, the Internal Revenue Service requires the statement, "Political contributions are not deductible for federal income tax purposes," on all campaign materials.

The three types of direct mail

1. *Housefile*. These are individuals who have contributed to you in the past. This list should typically generate a five to ten percent return. However, depending on the appeal, your rate of return can even be higher.
2. *Suspects*. These are individuals who have contributed to other candidates or political organizations or people you think would give if asked. Plan on a one to three percent return on every mailing.
3. *Prospects*. You have no idea if these people have ever given a political contribution or if they have ever given through the mail. Registered voters fall into this category (and that's why it's not the optimal group from whom to raise money.) The goal here is to identify new donor names. You'll lose money, but it can be worth it (as explained below).

How do I reach each group?

Donor Mailings: A "donor" is someone who has contributed to your campaign or organization; donors make up your house file. By mailing and re-mailing your donor file regularly, you should raise net dollars.

Once someone has contributed to your campaign or party organization, that person has indicated he agrees with your cause. As long as your campaign continues to work for the ideals espoused in your original prospecting letters, there is a great likelihood that your donor will make repeat contributions.

The donor has made a commitment in dollars. The donor has an investment. That means he now has a reason to protect that investment, so the donor will make an additional contribution from time to time.

Furthermore, you can use information about a known donor to request a larger donation. Thus, someone who gave \$25 in the prospecting phase can be asked to "upgrade" his next donation to \$50 or \$100.

To have a successful program it is crucial that you keep good records and send out personal thank-you letters in a timely fashion. Obviously, as the donor list grows, income grows as well. And if the plan is constructed so that a donor mailing is sent regularly, a significant amount of net income can be raised.

Your finance plan should include a donor file mailing schedule complete with target drop dates, package themes and signatories, anticipated gross and net costs.

Donors should receive mailings as often as you have a reason—normally every 30 - 45 days, and as often as you continue to net money. Donor mail should be as personal as you can afford. The typical format is "Dear (first name)" and signed in blue ink (studies show this works best).

As Election Day approaches you can mail more frequently. Assuming the election is in November, you should plan to mail every 4-6 weeks in the early part of the year and increase mailings to every two weeks in the fall—as long as you're making money each time.

Suspect mailings: "Suspecting" focuses on building your donor base. Quite simply, suspect mailings are sent to persons who have never given to your campaign before but have given to other candidates or party organizations or non-profit organizations. Because these contributors have a history of donating to like-minded causes, you can expect a higher return than you would with pure prospecting.

The key to successful suspecting? The list. No matter how good the letter or the letter-signer, if the list isn't good, your efforts will fail.

There are two basic reasons to do suspecting: (1) to build the donor base and (2) to counter the natural attrition of your file, which is approximately 20-60% through people moving, dying or just losing interest.

There's no guarantee that a mailing will yield a particular percent response, an average donation or have a set cost. Generally, the average donation will be equivalent to the lowest amount you ask for in the range (i.e., \$25, \$50, \$75, or other) but can vary. The average contribution for a political campaign is about \$35.

Other factors that affect mailings are name recognition of the candidate or letter-signer, the timing of the letter and, of course, the theme. A way to minimize loss of revenue on a mailing is to pre-test various lists and different package themes in small quantities before mailing to the rest of the list.

Prospect mailings: Prospect mailings focus on building your donor base by contacting registered Republicans/Democrats and others who have never given to campaigns before. Since this is a highly speculative mailing, most candidates lose money – and avoid taking the risk. As with suspecting, consider doing prospecting to build your donor base and counter the natural attrition of your file.

When prospecting, it's important to be cost-conscious. Because personalizing the package is more expensive, the salutation for prospect letters is often "Dear Friend" or "Dear Fellow Republican" or "Democrat." Another cost-cutting measure is to reduce postage costs by using pre-canceled bulk rate stamps but keep in mind that bulk rate stamps are not delivered in a timely manner and don't have the open rate of first class stamps (nor are they forwarded if your prospect has moved).

Netting donors, not dollars, is the goal of prospecting. The importance of prospecting is the most difficult concept to sell to candidates, party leadership and finance committee members.

The prospecting phase causes direct mail to be expensive at the launch. The reason is simple: prospecting programs generally yield a response rate of less than one percent of the total list mailed. With an average contribution in the range of \$30 or so, the low response rate usually means the mailing will lose money.

So, a mailing sent to 10,000 individuals that yields a one percent response, or 100 donors, and returns a \$30 average contribution means gross revenue of just

\$3,000. If the mailing has a cost of \$3,000, the investment is totally recovered. No net money is received. *But the whole reason for doing this is that you now have 100 donors to add to your file that can be relied upon in the future to respond to additional fundraising appeals.*

Mix the right ingredients to make a successful direct mail piece

Success or failure of a direct mail piece depends on the proper mix of ingredients. The first and foremost ingredient is the theme. The theme you select is a major factor in determining the success of a mailing.

Other ingredients determining the success break down as follows: the list; copy and appearance; timing of the letter; the signer; and technique (including use of an involvement device).

1. *The theme.* You must determine the strongest possible topic for your letter. The message should be tied to the themes of your overall campaign. You must decide what sets you and your campaign apart from the others. This could be your qualifications and/or vision, a specific issue, a survey or an urgent appeal.

Whatever topic you choose, it must be emotional – something that really moves the potential contributor to open up her wallet or get out her credit card. A local issue is preferable to a national issue because it hits closer to home and affects the donor more personally.

If you use a specific issue, the issue should be fresh and "in the news." You want the potential donor to already be aware of the issue. A word of caution: if you use an issue regarding pending legislation, be careful of timing. It's a disaster to have an issue piece hit the streets after the legislation has been acted upon. The U.S. Post Office allows campaign to "red tag" mail – a special red tag is attached to your bag of mail giving it priority delivery.

Overall, the theme must be acceptable to the signer. Try to match the strongest compatible name possible to your package. More often than not, the candidate signs the letter.

2. *The list.* To sell real estate, it's all about location, location, location. In direct mail fundraising, it's all about the list, the list, the list. Collect as many prospect/suspect lists as possible. There are many reliable listbrokers who can rent you proven lists.

However, be aware that it is against the law to mail Federal candidates' FEC lists. These

lists are “salted” or “seeded” with fake names to catch violators. Don’t risk a (huge) fine and/or a negative news story. Be sure your housefile is kept up to date and continually maintained on a reliable database management system.

Safeguard your list and don’t leave it lying around or unprotected on a computer. Lock up a hard copy and backup copy on a thumb-drive in a safe location—on of both on-site and off-site—in case something happens to your computer system or headquarters. Make sure any cloud storage is secure.

When you enter donor information from your contributors’ checks, make sure to record *all* information including date and amount of contribution, address information, spouse’s name, phone number, employer, e-mail, etc. All this information will be useful over the long term. For a Federal campaign you will also need to record the donor’s employer and occupation—and be sure to adhere to any state/local requirements.

Securing phone numbers—home, office, and cell—is critical. You may not presently be using a telemarketing appeal, but you may choose to do so in the future. By entering the phone number now, you’ll have this valuable information should you ever need it.

What are the components of a direct mail package?

Letters should be written in a person-to-person format, conversational, typed (not typeset), with only one signature. Don’t be wordy or intellectual. Studies indicate that the most productive fundraising letters are written to the 5th grade reading level.

Before we talk about the four steps to an effective fundraising letter, let’s talk about the way in which people read fundraising letters. It isn’t as easy as you think.

1. First, they read your first line.
2. Then, they look to see who signed the letter.
3. Then, they read the P.S.
4. Then, they go back to read your second sentence, and, if you’ve gotten their attention, they will then skim the letter.

Very few people read the whole letter.

So, knowing this, you need to do a few things when writing.

1. *Get their attention.* Get the reader’s attention in the first paragraph and establish common ground.
2. *Problem.* State your problem or specific financial need (i.e. I need

\$2,000 to do GOTV phoning, \$300 for bumper stickers, or \$5,000 for radio ads).

3. *Solution*. The “solution” to the problem is for the donor to give money! Ask for specific amount and, if you can, tell him you need it by a specific date.
4. *Closing the sale*. Make certain to ask for the contribution. Create a sense of urgency.

The letter copy should fit the appeal. An emergency telegram doesn’t make sense in January unless there’s a special election or a real emergency. A telegram-type package mailed 30 days before the election makes more sense.

Besides content, you must consider:

1. *Carrier envelope*. The major challenge in direct mail is trying to get the potential donor to open your letter package. You can have the best direct mail letter ever written but it doesn’t matter if nobody opens your envelope. Try to change the look of each of your appeals so they don’t look like “just another piece of campaign mail.” Sometimes a “teaser headline” can entice a person to open the envelope.

Printed, closed-faced envelopes or hand-addressed envelopes are the best approach. However, with a large donor file – or small budget – this can be difficult. Options to consider include the use of window envelopes, clear labels that don’t look like labels when affixed to the envelope, or labels affixed to a response card of the back of a business-reply envelope so the label shows through a window envelope.

The least desirable option: a white label attached to a closed-face envelope. It screams “junk mail.”

Again, the carrier envelope must fit the appeal. Envelopes range from 6” x 9” to #10s (normal business envelope size) to monarch (personal stationery size). During an aggressive mail program, all these envelope sizes should be used.

2. *Response device*. Next to the letter, the reply form is the most important piece in the package. This form should summarize the theme of the letter. Because your donor may lose the letter, you must make certain that you summarize the message and put your return address on the reply form.

In addition to the summary, you also need to have a suggested range of dollar levels that you’re asking of the donor. The average contribution you’ll receive most likely will be the lowest dollar amount you requested. You should also list

an “other” amount in case the person doesn’t want to make a donation corresponding to the levels you’ve suggested.

Other information for the response device includes:

1. *Please make your check payable to* _____. or visit the website to make a secure, credit card contribution.
2. *Any disclaimers required by law.* Provide a place for the donor’s name, address, occupation and employer information that must be obtained under the law for reporting purposes. Also collect home/office/cell phone numbers and email addresses. If you choose to do so, add a note telling them that you will not send them too much email and that you will not rent, sell, or exchange their email name with any other candidate or organization . . .and then stick to that promise.
3. It’s also recommended that you have a mail code on your reply device so you can track the response to different lists (especially in a suspecting/prospecting appeal).
4. *Reply envelopes.* If you’re going to be sending out a lot of direct mail, strongly consider using a business reply envelope (BRE) that’s paid for by your campaign. You want to make it as simple as possible for the donor to respond. By paying for the envelope to be returned, you’ve taken away one of the reasons people don’t send checks. Be sure to check with the post office for the exact printing and layout specifications.

There are three types of BRE permits:

1. *Advance Deposit.* With this method, you open an account with the post office by paying an annual fee. Then you deposit a few hundred dollars into this account. The Post Office charges you first-class postage plus a processing fee for each letter returned to you.
2. *Pay As You Go.* With this system you don’t make an advanced deposit. You simply pay first class postage plus a higher handling fee. This method works best if you have a small mailing program.
3. *Enclosures/involvement device.* This is simply an enclosure to get the individual involved in the package. It can be as simple as a newspaper clipping, a poll or survey, a photograph, or a copy of your position on issues. Although the involvement device should be related to the appeal for money, it shouldn’t mention fundraising specifically. Be absolutely sure to put your logo/address on any inserts. Often people will save only the insert to be read later. If they decide to give later, you want to make it easy for them to do so.

What kind of postage should I use?

There are four types of postage:

1. First Class
2. Pre-canceled bulk rate
3. Metered postage
4. Pre-printed indicia (that little box printed in the upper right-hand corner that states "Paid for by Smith for State Senate")

In most situations, "real" stamps are definitely the best method. If you can afford it and are mailing to your "best" donors, first class is the way to go. However, with the continuing rise of postal rates, bulk-rate stamps aren't a bad alternative but keep in mind it takes much more time to deliver them. Bulk-rate stamps are "pre-canceled" – this means the post office doesn't have the monumental task of canceling all the envelopes.

Metered and pre-printed indicia are least desirable because they make your package look like "junk mail."

Who should sign my fundraising letters?

You need a visible and credible signer for each fundraising appeal. The signer should be somehow connected to the issue you're addressing in your letter. Letters written by your spouse—because he/she can say all kinds of wonderful things about you—are very effective.

Possible signatories include the candidate, elected officials such as state senators, congressional members, state legislators, retired military officials, authors or sports stars, news headliners, party officials (chairmen, finance chairmen, executive directors, etc.), former candidates, or spouses/relatives.

Use only one signer for your direct mail letter. Using two signatures on a letter will waste one good signature. Remember direct mail is about one person writing a letter to only one other person. Be sure to match the most effective signature to the most appropriate list.

How should I track my direct mail?

Track each mailing separately using a coding system. By following this format, you can clearly show the overall cost, gross and net figures for your donor mailings, while simultaneously illustrating the benefits of the prospecting/suspecting program.

Keep up-to-date, clean records so you can easily generate the required state or federal

election financial reports. If you enter contributor information on a regular basis, you won't have to deal with a staffing or bookkeeping crunch when those reports come due.

A sample *Direct Mail Tracking Sheet* is provided in Appendix C for your reference.

The following five steps will outline an easy-to-follow, yet accurate method of tracking:

1. *Assign each mailing a code.* If you're sending the same package to several different lists or types of lists, assign a separate code to each to provide an accurate picture of how each list performed.
2. Enter the code, package and target group or list information on a Direct Mail Income Code List (see Appendix D).
3. *Code the response devices of each direct mail package* with an appropriate code. That way, when the returns start coming in, you can track each list separately.
4. *Fill in the Direct Mail Tracking Sheet.* (See Appendix C). Each code will have its own sheet. Each day enter the number of returns with money and how much money was received that day. Tally the cumulative totals to gauge progress of the mailing.
5. *Compute final statistics* such as gross income, cost, net income, average contribution and response percentage as soon as the mailing returns taper off completely (probably about 30-60 days, but it can be even longer if you used bulk mail).

Test your fundraising package

Both a good package and a good list are necessary ingredients for a successful mailing. To ensure that you have both, testing is necessary.

To test, send the package to part of your list (a random sample is most accurate). Testing makes little sense if you're mailing to a small list because you must mail at least 1,000 letters of each version to get an accurate evaluation. Track the mailing until you reach the "doubling date." It's helpful to determine the doubling date to project, in advance, what the mailing will produce.

In a nutshell: keep a daily, accurate count of the income you produce once you start getting check/contributions in the mail. For instance, if you mail a fundraising letter using first class postage on Thursday and you start seeing results on Monday, begin to measure your results that day. If you receive checks/contributions totaling \$3,500 in the first ten days, you can predict that you'll ultimately raise \$7,000 from this mailing. Hence, "doubling" your income.

The doubling date is different for every campaign or organization. The only way to

figure it out is to mail and measure. Generally, however, you can expect a #10 letter mailed first class to double in ten days. A 9x12" letter mailed first class can take ten to 12 days to double. Anything mailed bulk rate can take up to 30-33 days to double. This is, of course, different if you are mailing inside only one state, etc.

The "doubling date" helps you gauge the rate of success for each test mailing. It allows you to decide whether to roll out your list after the doubling day, rather than waiting for the mailing to run a full cycle.

If you aren't satisfied with the results on the doubling day, either your list or your package is not good. If this happens, your options are as follows:

- Test the same package against a segment of another list
- Test a new package against a segment of the same list

Evaluate your direct mail program.

Always take time to evaluate your direct mail program. Here are some key questions to ask:

- Is it cost effective?
- Are you getting contributions greater than \$30?
- Are you getting a response rate of five to ten percent from your current year donors?
- Are you breaking even on prospecting/suspecting or, at a minimum, receiving a one percent response rate?

Another cost people often overlook is the amount of staff time involved in writing, producing and analyzing your mail packages. If you have an active finance director, she should be involved not only with the mail, but also with events and major donor programs. If writing and producing your direct mail is incredibly time-consuming, you may need to consider seeking help from an outside consultant.

Telemarketing

Telemarketing is simply using a professional phone bank to contact potential donors to raise money.

Traditionally, contributors respond better to more personal contacts. The phone call is a personal and dynamic method to contact donors. You have an instant response – and know at the end of a call whether the person is likely to contribute. It's important to

remember that telemarketing fundraising is a long-term investment.

The wonderful quality about telemarketing is its flexibility. For example, if a particular phone script isn't working, it can be changed on the spot – unlike direct mail that can only be tested after a quantity is printed. Be sure to check state laws regarding telemarketing; many states have instituted restrictions. While political campaigns are exempt from the FCC's "Do Not Call" list, reputable telemarketing firms do respect those people who have requested that they aren't solicited.

Phoning known donors is a sure way to make money. Also, telemarketing is most effective in suspecting/prospecting for potential donors. By using a phone bank to test a list of potential donors, you know immediately if your list can produce contributors.

Although telemarketing is more expensive per contributor than direct mail, it would take far more direct mail pieces than telephone calls to find the same number of new contributors.

Despite these advantages, telemarketing isn't a very effective way for state legislative and local campaigns to raise money. Telemarketing is expensive and time-consuming. It takes time and money to set up a phone bank program.

Telemarketing is better used as a secondary fundraising method for state legislative and local campaigns. It should be implemented as a supplemental tactic to accompany personal solicitation, events and direct mail. Remember to adhere to campaign finance regulations. This IRS disclaimer must be part of your telemarketing script: "Contributions to political campaigns are not deductible for income tax purposes."

Digital Fundraising: Email, Social Media, Online Advertising and More

Digital fundraising is a powerful (though evolving) way to raise money online. John McCain's 2000 presidential primary campaign set a then-record amount of more than \$6M in online contributions (including \$1M overnight after his New Hampshire victory) and set in motion 16 years worth of fundraising innovations that continues today. In 2012, the Obama Presidential campaign raised more than \$500 million. Today, online fundraising can generate about 10-30% of a political campaign's total dollars raised—depending on the size and scope of the campaign.

It's critical that your online fundraising efforts exist to enhance more traditional fundraising techniques. Online appeals should parallel major milestones in the campaign like FEC deadlines, fundraising goals met or the candidate's birthday.

The following is a brief overview of the different strategies you can take in your digital fundraising efforts. Implemented together in conjunction with a strong offline fundraising plan, your online strategy will set you up for fundraising success.

1. Emails

Over time email fundraising has increased as funds raised directly through a campaign's website have steadily decreased. Jen Stolp, formerly of the internet fundraising firm Campaign Solutions agrees. In her must-read [Campaigns & Elections article](#) from 2011 (which still holds true for current trends) If you were to draw a line representing the online funds raised through e-mail beginning with the 2000 election, it would steadily decline through the 2008 election before shooting up in 2010. Last cycle, the vast majority of our company's clients—

Republican candidates and organizations representing every region of the country—raised anywhere from 60% to 90% of their online funds via e-mail.”

Bottom line: if you want to raise money online, think email first. Facebook, Google, Twitter and your website will all have valuable roles to play in the complete and integrated online fundraising program. However, you simply can't expect to raise significant money online without an email-centric strategy. As Stolp advises: “Nothing will give a campaign a more significant online fundraising advantage than a large, active, and organically built e-mail list.”

With email more important than ever to online fundraising, it's important to pay close attention to each aspect of the email including the sender, the recipient, the subject line, the timestamp and most importantly, the message. You'll find that many of the rules regarding style and word usage in emails are similar to those in direct mail copy- except much shorter, to the point and concise. Follow these suggestions to increase your email's open rate:

2. Subject Lines

As a general rule, subject lines should be kept to 50 characters or five to seven words or less. Due to differing email providers and mobile devices, some people may only be able to see the first 21 characters.

Three types of subject lines:

- Make an announcement or report news (ex. Romney endorsed by Gov. Rick Perry).
- Inspire curiosity (ex. Take a guess).
- Spell out how the reader can benefit from opening the email (ex. Be my guest at the President's rally).

3. Your message:

- Sell, don't tell.
- Use persuasive and descriptive words.
- Start your statement with an action verb.
- Ask a question (ex. Did you see the billboard?).
- Create a list (ex. 5 Reasons Obama Will Win in 2012).
- Test, test, test! Let your list decide what subject lines resonate best. The subject lines that "work" for you may not generate the opens you need to convert donations. Test everything and let the marketplace decide your winner. A/B "split testing" is often a wise move.
- Keep the "from" consistent or narrow it down to a few "signers" with the strongest relationship to the list and/or issue. High profile "guest" signers can also work well if selected strategically.

4. Lists & Targeting

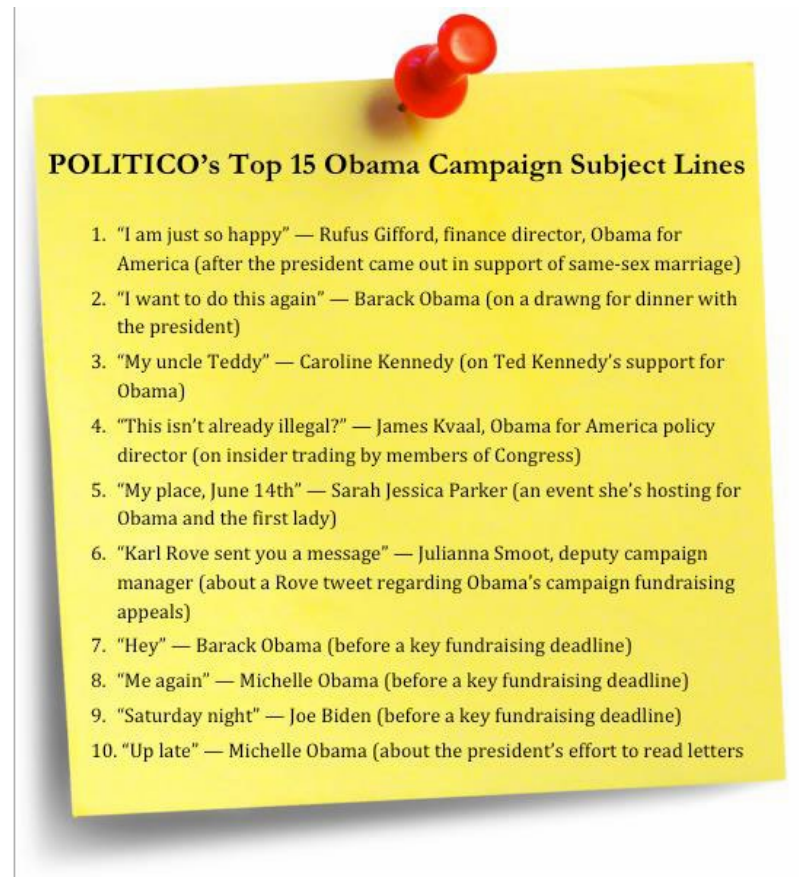
- Personalize when possible
- List members should receive certain messages based on their locale, interests, job, etc.

Most campaigns should avoid purchasing email lists if the goal is to raise money. People must agree to receive your emails. Instead, focus on building your list organically through the following means:

- Petitions
- Online advertising is the key: invest in an email acquisition program through targeted Facebook, Google and Twitter ads. Find your supporters and likely donors where they "live" on line. Your goal is to fish where the fish are and these networks offer a stocked pond for most campaigns.
- Forward to a friend
- Events
- List swaps with similar organizations
- Social media
- Website splash page
- Rent an "opt in" list and send an email asking people to subscribe to your list. Explore revenue share appeals with like-minded campaigns, organizations or advocacy groups. In this scenario, your campaign doesn't pay a hard rental fee up front. Instead, you pay the pass-through cost for deployment (usually minimal) and split the proceeds with the partnering organization on the backend (as per a pre-determined profit sharing rate).

Explore cost-per-lead advertising campaigns like Care2 or change.org. This is not appropriate for everyone but such networks offer a time-tested bounty model in which your campaign is guaranteed to acquire "X" number of new names for a pre-determined price per name.

Manage your lists with list with appropriate campaign management software. Several popular political list management programs include NGP VAN, Aristotle and Catalist. However, some of the most popular consumer models aren't appropriate email vendors for political or advocacy mail so do your research first.



5. Copywriting:

- The first sentence or P.S. is the most important and may be all a person reads. Make sure it's a good one.
- You can start sentences with "And" and "But".
- Use contractions and be personal. Email fundraising (like all fundraising) is about relationships with the donors so reinforce this in your copy.
- Make sure there is at least one call to action above the fold.
- Use a link within the first 150 words of your email.
- Use single clause sentences only.
- Write in the 2nd person—use "you," not "we"
- Set a specific deadline, or goal, for supporters
- Focus on one call-to-action per message. If you ask your prospect to do too much,

chances are she will do nothing at all. Better to concentrate everything on one crystal clear ask.

- Include specifics on where a supporter's money will go (e.g. your donation of \$25 will allow me to purchase 100 yard signs but a donation of \$100 or more will allow me to purchase air time on cable TV in my district)
- Make the "asks" clear and the action links easy to find.
- Include other forms of content like video, audio and pictures.

6. Timing

Timing is perhaps the most important component of online fundraising. Sometimes a good message today trumps a great message tomorrow. Online fundraising, perhaps more than any other kind of fundraising, is an *impulse buy*. You must capitalize on breaking events and relevant news stories (e.g. new polling data, opponent missteps, and anything relevant to your overall campaign message and narrative frame).

- Send out emails around holidays that represent issues relating to your candidate or organization such as Memorial Day, the 4th of July or Labor Day. FEC deadlines, end-of-quarter appeals and any deadline (internal or external) should be built into the schedule. Map them out and factor into the written campaign communications schedule.
- Leave room for unplanned emails that can ride the coattails of a recent news story or event that relates to the candidate or organization.
- Timing and intensity of email appeals should be factored into the schedule. There will be times when it's appropriate to limit your direct asks (e.g. 2-4 times per month). However, there will be many other times when you can hit your list much more aggressively (e.g. as election day nears, big defining moments like the build up to a key vote, or during a surge of positive news coverage). Limit direct asks in emails to two to four times per month. Test to see what your audience prefers out front and vary as per the metrics (open rates, unsubscribes, conversion rates).

7. Digital Fundraising

Digital has increasingly become an integral part of any campaign's fundraising efforts. Studies have shown that campaigns that implement a social media strategy are as much as 40% more successful in fundraising than their offline counterparts. That's not to say that social media alone can raise funds.

Social media should be used as an engagement tool, used to supplement other direct fundraising techniques. Campaigns leverage social media to: spread the word about its candidate or issue, promote events, raise a large amount of money in a short amount of time or to encourage peer-to-peer fundraising.

With the rise of email fundraising discussed above, more campaigns have increasingly turned to data mining on the big social networks to acquire new email addresses, build supporter lists, prospect for donors, and “talk” to their base in multiple ways, simultaneously.

8. Moneybombs

A “moneybomb” is a grassroots effort aimed at raising large amounts of funds during a specific, small window of time concentrated around very high impact moments.

This technique is primarily implemented in larger scale campaigns.

“Moneybombs” are fueled by the viral spread of videos, images, and words of encouragement through social networks like YouTube, Facebook, Twitter and e-mails.

Ron Paul dropped the first “moneybomb” in 2007 when he raised \$4M in a 24-hour period. Former Congresswoman Michelle Bachmann (\$100,000) and Sen. Scott Brown (\$1.3M) have successfully used moneybombs” in their fundraising.

A “moneybomb” is more effective financially and politically if held in conjunction with an event or holiday. But successful “moneybombs” take a lot of planning; rarely are they “organic.”

9. Events

- **Create a Facebook page with event details.** Engage with attendees on the event wall. Post pictures to the page after the event. Take credit cards.
- **Establish a hashtag for the event** (ex. #WTW2012 for Running Start’s 2012 Women to Watch Awards). Use the hashtag to generate questions, feedback and discussion before, during, and after the event.
- **Use an online event registration site.** It can help you keep track of attendees and will help process tickets and donations. Popular providers include Eventbrite and Cvent
- **Post event details on boards of groups you’re signed up for on LinkedIn.** LinkedIn is a social network of more than 100 million working professionals.
- **Post videos and pictures as they happen.** Sites such as Pinterest, YouTube, Facebook and Instagram generate traffic to your site with powerful images and influential videos.

10. Peer-to-Peer Fundraising

People who donate because a friend asked them to generally donate double the amount they would have given otherwise.

- Keep in mind that Twitter and Facebook posts only convert roughly .25% impressions into donations. The majority of your social media contributions will not come directly from Facebook or Twitter posts but you *can* convert these key supporters into email addresses for political contributions.
- Attach sharing buttons to all media so users can share it on their social media sites.
- “Attach sharing buttons to all media so users can share it on their social media sites or Twitter posts.

11. Mobile

Mobile phones are being used by organizations across the country to supplement their fundraising efforts. Many non-profits are increasingly using mobile devices to raise money through text-to-donate campaigns; candidates and campaigns are using Smartphones as mobile collection devices and have created candidate/issue-focused apps. Mobile technology allows you to make the “ask” while the coals are still hot, when the need is still visible and immediate, and events are unfolding.

12. Text-to-Donate

Text-to-donate campaigns encourage supporters to donate to a charity or organization by simply texting a unique 4- or 5-digit code to a special number. For example, you can text REDCROSS to 90999 right now and \$10 would be added to your next phone bill to support American Red Cross Disaster Relief. Text-to-donate campaigns can be extremely effective when leveraged the right way. In 2010, more than \$32 million was raised for Haiti earthquake relief through mobile giving. Keep in mind, however, this isn’t cheap: the phone and credit card companies take a large cut of the donation.

Text-to-donate contributions are now permitted under Federal election law in federal races.

Text donations are not for all campaigns and present many challenges that consultants are addressing:

- **Text donations are not immediate.** It can take several weeks, even months, for the organization to actually receive the donation. In political campaigns, cash-on-hand is critical to last minute ad buys and GOTV efforts.
- **Text donations don’t provide enough information about the donor.** Text donations are only tagged with the person’s cell phone number. Therefore, the campaign can’t collect the donor’s name, address, occupation and employer, as the FEC regulates.
- **High carrier charges impede on revenue.** With the number of small donors increasing in each election, a 50% take from the mobile carrier could really add up
- **Text-to-donate is a rapidly evolving field and most down-ballot** campaigns won’t raise significant funds in this way. However, for all campaigns, it’s wise to adopt a “mobile first” approach to your traditional online donation page to ensure that it easily

accommodates many different mobile devices and screens (iPads, iPhones, Androids) so as not leave any potential donors on the table.

13. Online Advertising

Online advertisements are different from advertisements that you find in print or on the television because they can be automatically acted upon. If an advertisement succeeds in persuading a viewer, the person can click and will immediately be directed to a donation or purchase page. Advertisements can be displayed on specific search terms or on websites related to the candidate or issue. Below are descriptions of a variety of Internet ads you can buy for your organization or candidate, as explained by Colin Delany of EPolitics.com in his article "[How Campaigns Can Use the Internet to Win in 2012](#)".

14. Display Ads

Display ads are the descendants of the banner ads that sprang up everywhere during the first dot-com boom, but the family has now expanded to include sophisticated video pieces, Flash animations, database interactions and "floating" pop-overs. Display ads remain popular for both recruiting and message-distribution, but they can present one difficulty: they often have to be tailored to the particular requirements of a given website or publisher, particularly if they include higher-end features.

Also depending on the publisher, display ads can be targeted at particular site users, particularly on sites like web portals and social networks as well as newspapers and others that collect financial, demographic and usage data on their readers. An advertiser on *Washington Post* web properties, for instance, can aim ads at employees of particular companies, showing them only to readers coming from the selected .com domain(s). Of course, advertisers can target by interest as well as by demographics, running ads only on special-interest sites or on special-interest sections of mass-audience and news sites.

15. Contextual (Search) Ads

The second common online advertising channel deploys text ads on web pages based on the content of those pages. Google Ads are the classic example; with ads being served to a search results page based on what topic the person has generated a search. Google also sells text ads on thousands of sites across the web, also targeted based on the content of their individual pages, and similar ad networks have sprung up as well.

Contextual ads have proven to be very effective for both commercial and political advertisers, with easy and obvious targeting based on a variety of factors including

keyword and reader location. Most also feature easy testing of alternative ad message/keyword combinations and the ability to change ads and ad runs mid-stream.

In practice, Google Ads have turned out to have an excellent Return On Investment (ROI) when used to build fundraising lists. For example, the McCain-Palin presidential campaign in 2008 raised nearly 10% of its online fundraising haul (or \$10 million) just from search advertising—an award-winning 3-to-1 ROI. However, such results are not likely to scale for most political campaigns that lack national volume of search activity (e.g. down ballot races, congressional campaigns, local elections).

To get the most out of contextual ads, testing and tracking are vital. Since ads on a particular page are arranged and emphasized based on the amount each advertiser has “bid” to purchase those keywords, a campaign may be able to reach more people for the same amount of money by advertising on more-specific queries.

For instance, advertising on the word “outdoors” is likely to be expensive, since lots of different retailers, outfitters and advocacy groups will be competing for it. Advertising on “alternative fuel biodiesel,” on the other hand, may be much cheaper, and its superior targeting may also yield better results per-ad-viewed. Smart advertisers will test many different keyword/ad combinations to find the best and most cost-effective results.

Two other considerations about Google and other contextually targeted ad systems: first, if you target well, they’ll reach people at the moment when they’re potentially interested in your issues, since they’re either searching for it or they’re on a page that’s somehow related.

Second, Google ads have a secondary branding effect, since they put your message in front of web searchers and readers regardless of whether they actually click on them. Some research has even shown that it’s beneficial to have a Google Ad show up on a page that also has your site in the organic Google search results — if a page contains both your ad and your link in the Google search results, more people click on your link, as if the ad somehow delivered extra visibility or credibility.

16. Facebook Ads

Facebook has significantly expanded its place on the online advertising playing field in part because ads on the social network can be easily targeted at people based on the interests and demographic characteristics they’ve listed in their Facebook profiles (“men aged 25- 34 who like football” would be a targetable group, for instance). Many sophisticated campaigns are now targeting their own page supporters to harvest emails and direct contributions.

First, Facebook ads are easy to buy — anyone with a Facebook profile and a credit card can set up a campaign. However, a qualified media buying firm with political experience is usually a wise investment to maximize your advertising buy.

Second, the creative elements are equally simple, with a small image and a few words of text, along with a “Like” button and a link to the appropriate landing page (ads can point to a Facebook page or to an outside website). Finally, up to this point at least, Facebook ads have been relatively cost-effective, with the price-per-click sometimes as low as a few tens of cents. Note that the cost is highly variable, and that at least for now, Facebook’s price structure rewards success: the higher the rate at which a particular ad run is clicked, the lower the cost moves over time. As a result, Facebook effectively rewards experimentation, and as with Google ads, Facebook advertisers frequently test many different combinations of creative elements and targeting to find the final versions on which to concentrate resources.

17. Video Ads

Many YouTube clips now have a text ad overlay or are preceded by a video ad, for example, and another opportunity lays in “pre-roll” ads on the internet versions of TV shows. Sites like Hulu.com, for instance, stream thousands of programs to people across the country, and campaigns have begun placing web versions of their TV commercials at the beginning of web clips on the sites.

Other opportunities exist on sites for networks or individual shows (on episodes hosted on the Daily Show’s website, for instance), and it’s likely that pre-roll video will only increase in popularity. For one thing, it’s close enough to traditional television advertising that media consultants can adapt their content to it quickly. Online video is yet another tool to round out an integrated online fundraising plan.

18. Blog Ads

As we discussed above, campaigns can buy advertising on blogs, either through the Blogads.com site or through other blog advertising networks. These ads are naturally targeted based on each blog’s particular niche, and ads on specialized sites such as local or regional political blogs frequently reach very influential audiences at a low relative cost. Note that very large sites like Huffington Post sell advertising directly, just like WashingtonPost.com and NYTimes.com.

19. Mobile Advertising

One development in the 2010 election cycle was the first significant use of mobile advertising, particularly ads on the cell phone-optimized versions on websites and search engines. Because of the GPS features built into modern “smart” phones, mobile ads can be geo-targeted as well as aimed at people based on their search queries. Congresswoman Michelle Bachmann reportedly bought ads aimed at people at the 2010 Minnesota State Fair, for instance, and other candidates

attempted to reach people finding their polling places or even researching candidates while standing in line to vote. Mobile advertising is still very much a niche application, though that situation may change if cell phones start to dominate Americans' Internet usage as they do in some other countries.

20. Donation Pages

Donation pages are a commonly overlooked, yet crucial part, of the online donation process. Donor Digital's Melissa Tooley explains that "...while email and Web page copy may persuade people to 'click to donate now,' less than half of those who click through to the donation page (and often just a few percent) typically complete the donation transaction." Thus, it is crucial that you abide by these rules to make donating easily accessible and simple to complete:

- **Do** make the donate button large, prominent, and colorful, so people of all ages are easily able to see and navigate to the donation page.
- **Don't** make donation page longer than one page.
- **Do** use some text and graphics to briefly explain the mission of your organization and how the prospective contributor's donation will be used.
- **Do** keep the donation form as simple as possible, only collecting information necessary to process the payment under FEC guidelines.
- **Don't** forget to collect email addresses!
- **Do** prominently display site trust seals above the fold (the part of a page that's visible without scrolling) to ensure user security.
- **Do** make the donation page resemble the rest of the pages on your site. According to Network For Good's 2011 Online Giving Index, donation pages that follow the same brand as the rest of the site raise five times more money than sites with generic donation pages.
- **Do** use different landing pages for different types of donations. A one-page-fits-all style often looks cluttered. Target your donation page creative around specific fundraising campaigns and drives to maximize contributions.
- **Do** always give donors suggested gift amounts. You can have an "other" category, but testing shows that donation pages work best when there is a clear minimum donation.
- **Don't** require donors to register for your site in order to make a donation. You'll often times lose prospective supporters with the long process of registration.
- **Do** constantly test your donation page to determine what works best for your audience.
- **Do** have a clear thank you on the confirmation page and include a link for people to share their donation on social media. Follow that with an email thank you and donation confirmation.

A Note About Non-Profits

Most of the tools and tactics in this chapter apply equally well to both political campaigns and non-profit organizations. However, there are a few key differences to factor in to your respective fundraising plan. For example, unlike political campaigns, donations to IRS certified 501(c)3 charitable organizations are fully tax-deductible and can be aggressively solicited for year-end fundraising drives.

In recent years, crowdfunding has become a popular approach for startups and charities in need of a quick infusion of cash or seed money from a wide pool of supporters. Web platforms such as Kickstarter, Indiegogo and GoFundMe offer new venues to launch a charitable campaign or showcase the specificity of a project need (e.g. "donate to fund this new TV ad"). These components, coupled with deadline-driven urgency and social sharing functionality, help foster a sense of community and create a bandwagon effect to attract other donors.

Metrics

Online fundraising is equal parts message and metrics. It's all about right brain creativity (copywriting, graphics, story appeal) meets left brain analytics. If you want to do it the correct way, you must use both parts of your brain.

There's an old saying in traditional, offline media circles: *I know half my advertising is working - I just don't know WHICH half!*

Well, unlike other forms of political media, your campaign will know (often in real time) if the online marketing is working because you need to be tracking everything related to the online fundraising program: email open rates, click through rates, cost per acquisition, and donor conversions.

Here are some of the basic metrics you need to understand and measure to ensure your online fundraising campaign maximizes success:

1. **Open Rate.** is a percentage calculated by dividing the number of email messages opened by the total number of email messages sent (excluding those that bounced.) The higher your open rate, the more prospects you are talking to. If the email doesn't get opened, you don't receive a contribution.
2. **CPA.** your cost per acquisition of an email address from an online ad campaign, email rent.l, etc. The lower your CPA, the more email prospects you'll harvest per campaign; the bigger your file, the more potential donors for your campaign.

3. **CTR.** (*Click through rate*). Is the number of clicks generated per impression of an ad. This number is expressed as a percentage. $CTR = (\text{click}/\text{impressions}) * 100\%$
4. **CPC.** Cost per click is the effective amount you paid to get a click. It is calculated by dividing the cost with number of clicks.
5. **CPM.** Is the cost for 1000 impressions of the ad unit. Display advertising is generally sold on CPM basis
6. **Impressions.** Is the number of times your ad is displayed. The number by itself does not hold much value but it is a metric used to calculate other metrics.
7. **Retargeting.** Through retargeting techniques, you can tag and follow them to see if they make a donation or sign up for email — and how long it takes from the time they first click on an ad until they take action.

Final Thoughts

Online fundraising is a valuable and innovative way to raise small donations for most campaigns. However, at the end of the day, it raises small donations for most campaigns. It does substitute for a strong and well-developed campaign message. Technology is the amplification device. So, think strategy first, technology second.

Appendix A: 2017-2018

Contribution limits for 2017–2018 federal elections

		Recipient				
		Candidate committee	PAC† (SSF and nonconnected)	Party committee: state/district/local	Party committee: national	Additional national party committee accounts‡
Donor	Individual	\$2,700* per election	\$5,000 per year	\$10,000 per year (combined)	\$33,900* per year	\$101,700* per account, per year
	Candidate committee	\$2,000 per election	\$5,000 per year	Unlimited transfers	Unlimited transfers	
	PAC: multicandidate	\$5,000 per election	\$5,000 per year	\$5,000 per year (combined)	\$15,000 per year	\$45,000 per account, per year
	PAC: nonmulticandidate	\$2,700* per election	\$5,000 per year	\$10,000 per year (combined)	\$33,900* per year	\$101,700* per account, per year
	Party committee: state/district/local	\$5,000 per election	\$5,000 per year	Unlimited transfers	Unlimited transfers	
	Party committee: national	\$5,000 per election**	\$5,000 per year	Unlimited transfers	Unlimited transfers	

* Indexed for inflation in odd-numbered years.

† “PAC” here refers to a committee that makes contributions to other federal political committees ∅. Independent-expenditure-only political committees ∅ (sometimes called “Super PACs”) may accept unlimited contributions, including from corporations ∅ and labor organizations ∅.

‡ The limits in this column apply to a national party committee’s accounts for: (i) the presidential nominating convention; (ii) election recounts and contests and other legal proceedings; and (iii) national party headquarters buildings. A party’s national committee, Senate campaign committee and House campaign committee are each considered separate national party committees with separate limits. Only a national party committee, not the parties’ national congressional campaign committees, may have an account for the presidential nominating convention.

**Additionally, a national party committee and its Senatorial campaign committee may contribute up to \$47,400 combined per campaign to each Senate candidate.

Appendix B: Sample Campaign Income Worksheet

Sample Campaign Income Worksheet (In Net Dollars)

	January		February		March		April		May		June	
	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual
Personal Solicitation												
Major Donors												
Finance Committee												
Chairman												
Major Donors												
General Gifts												
Clubs												
Total												
Special Events												
Breakfasts												
Lunches												
Receptions												
Dinners												
Home Parties												
Total												
Direct Mail												
Donor												
Suspect												
Prospect												
Total												
Telemarketing												
Donor												
Lapsed Donor												
Suspect												
Cold Call												
Total												
Committees												
PACs												
Political Parties												
Total												

Sample Campaign Income Worksheet

(In Net Dollars)

Internet											
Email Solicitations											
Website											
Total											
Income and Expenditure Cash Flow Chart											
Monthly Income											
Carrv Over											
Balance											
Expenditures											
Month Ending Balance											

Chapter Four

Communications

Paid Media

Candidates need to communicate with voters, but given the constraints of time, they can only personally contact a small fraction of those they hope to represent. We use paid media to communicate our messages to voters our candidates cannot meet.

Radio Advertising

Radio advertising is a versatile and often cost-effective way to communicate your message to voters. Although nearly everyone listens to some radio, you'll want to consider restricting your ads to stations that reach people whose support counts. Some stations will reach large numbers of listeners, but many of those folks are unregistered voters or people who don't live in your district.

Radio can be targeted by station format, such as easy listening, top 40, rock, country-western, talk, all news, "golden oldies," classical, religious, etc. Since people of different interests and ages listen to different stations, it's easier to target your message in this medium than in others.

Answer these questions to see if radio advertising is cost-effective for your campaign:

1. *Is my district mainly rural, suburban or urban?* If your district is rural, with most of the folks in your communities listening to their hometown radio station, then it makes sense to buy radio time regardless of the station format.

If your district is suburban or urban, reaching thousands and thousands of listeners—of which only 10% actually live in your district—then radio may not be a good expenditure of your limited campaign dollars. Also, some markets are overcrowded with stations, meaning that you would have to buy time at dozens of stations to reach a large portion of your target audience.

2. *Who is my targeted audience?* Most radio stations have information detailing their audience and listener ratings and will share them with

you. There are a number of websites on the internet which contain information on reach and audience that are easily located with a little effort. Any media production firm will have access to this information as well.

Older voters and commuters are great targets to reach with radio advertising. Find out which stations they listen to the most. More than likely, they listen to all news, talk or easy-listening formats.

Guidelines for writing successful radio commercials

1. *Keep your script short and simple.* You really only need 60 words in a 30-second spot. Write and re-write your script until you can deliver your message in the most concise language.
2. *Stick to one issue, two at most.* If you try to address multiple issues in a commercial, you'll confuse the listener. Most people listen to radio while they are doing something else, so only simple messages will be understood.
3. *Talk about an issue the voters already understand.* A 30- or 60-second radio spot is just too short to introduce a totally new issue; explain the problem and tell how you're going to fix it.
4. *Use the candidate's name three or four times.* You're building name identification with radio, so repetition is critical. Repeat the candidate's name more often in a 60-second spot.
5. *Be creative.* The power of radio is the power of imagination. With a few sound effects, radio can create an image of traffic, children playing, the outdoors, a football game, etc., to add to the effectiveness of your commercial. A few hundred dollars worth of sound effects on radio can create a scene that would cost thousands of dollars to create on television.
6. *Coordinate your radio spots with other forms of media.* You've hit a homerun if a voter hears your spot on the radio, receives a direct mail piece, and sees a newspaper ad on the same subject.
7. *Keep it fresh.* Radio works because it's immediate. A week to ten days of hearing the same spot is enough. Otherwise, the message becomes stale.

8. *Remember to stay within the time limits of the ad.* If you send a station a 32 second ad they will clip off the last two seconds, assuming they agree to run it at all.

Producing radio commercials

Most radio stations have a studio where your ad can be produced. If not, check the Yellow Pages under "radio production" to locate a nearby studio. (Keep in mind that going to a professional studio instead of a local radio station will cost something. Studios charge by the hour, but for radio work the rates are reasonable.)

You can rent a recording studio from \$60-\$120 per hour. Since most radio production is now digital, you'll receive your ad on a CD or flash drive. You can upload the ad to the stations you buy time on.

Local stations and studios can provide a professional voice and sound effects, such as a musical background. Since radio time tends to be inexpensive, (at least compared to TV) it's worth the extra money to produce an excellent quality advertisement. Charges for professional voice work vary from city to city (professionals are often members of a union and will charge more) and can cost from \$60 to more than \$150 for a single recording. Studios have to pay a licensing fee to use music in a commercial, and charge from \$75 and up for use. Sound effects, if already taped, are generally free.

Finally, check state and local laws on disclaimer requirements. Many states require a candidate's voice to be heard in the ad, so you should record "Paid for by Friends of Sally Candidate" to add to the end of the commercial while you are in the studio.

Why candidates shouldn't record their own radio commercials in their basements

There are two reasons that this approach is rarely successful: 1) most candidates don't have a broadcast quality voice, and 2) candidate spots usually lack name identification. If you want your candidate to sound bad, then, by all means, get your smartphone and make some ads.

Buying radio time

Most radio ads are sold in 30- or 60-second increments of time and the cost depends on what time of day you want to air the spot. For instance, morning and afternoon "drive times" reach the most listeners, and, therefore, cost the most.

When you or a campaign worker meet with a radio salesperson, you can generally request the time of day you want your ads to air. Often you can choose "news adjacencies," which means your ad runs either before or after a newscast. Additionally, you can often buy ads on specific shows (such as the Morning Farm Report, a popular talk show, etc.).

Stations will offer to sell you "ROS" (run of the schedule) at a reduced rate. This means the station will scatter your spots throughout the day – and night. The price may be right, but this is not cost-effective because you don't have control over when your advertisement airs—and an ad that runs at 2 a.m. isn't heard by many voters. You are better off specifying when your ad will air and paying for the privilege.

Campaigns can use a "media buyer" to purchase time on radio stations. A media buyer is a professional, generally employed by an advertising agency, who specializes in radio and television placement and has a thorough knowledge of the market and the listeners.

However, if you go through a media buyer, be prepared to pay a commission for the service, traditionally an additional 15 percent of what the radio station will charge you. Local campaigns that buy their own airtime will save this commission. If you are planning on buying a lot of ads on a multitude of stations, hire a media buyer, as it will save you a lot of time and headaches .

Radio stations require payment up front. Be prepared to write a check for the full amount and to fill out paperwork for Federal Communications Commission regulations while at the station. Some stations will require a wire transfer from your bank before the ad plays.

The key to successful radio advertising is repetition. The more times your ad is played, the more people will hear it.

A general rule of thumb is to purchase at least eight spots a day for a period of a week to ten days. If you purchase fewer than eight spots a day, your message will be lost in the flood of other candidate commercials close to the election.

Newspaper Advertising

Much like the Internet, the newspaper is a selective media. What that means is readers look at ads they are interested in and ignore the rest. Since few people pick up the daily newspaper to find information about your candidate, newspaper advertising is usually ineffective. Also, the bigger the newspaper the harder it is to find your ad, so political advertising is most effective in community publications such

as smaller daily newspapers and weeklies in rural and suburban areas.

Newspaper advertising doesn't always offer the best use of limited campaign dollars because it's difficult to reach specific voters with targeted messages.

Unregistered voters, members of your opponent's party, children and other people who can't or won't vote for you read the newspaper. "Read" may not be the right word – most people scan the newspaper and only read advertisements of immediate interest. In fact, many daily newspaper readers skip entire sections of the paper

Should your campaign invest in newspaper advertising?

If you live in an area that is predominantly rural and suburban, with weekly newspapers or small daily newspapers, there are two main reasons to buy newspaper advertising:

1. People get most of their hometown news from local newspapers, and therefore, readership is greater.
2. Local newspapers are often small businesses that survive on local advertising dollars. They are more likely to publish your news releases and cover your events if you're an advertiser.

If you live in an urban or suburban area that is only served by a major daily newspaper, it's seldom cost effective to buy newspaper space. The circulation of the newspaper may be 100,000 homes of which only 10 percent live in your district. You're spending a lot of money to reach people who can't vote for you.

There are two exceptions, although these aren't strongly recommended. First, some daily newspapers can zip sort newspapers and insert a tabloid or other campaign brochure. This will only work if your district covers a complete zip code area. If not, you will be wasting money communicating with people who can't vote for you.

Second, some daily newspapers have a special weekly insert covering a specific suburban area. Your message would then go to people who live in that area.

Increase the effectiveness of your newspaper ads

1. *Make sure people see your ads.* Either buy an ad that is so big people can't miss it or buy a series of four or more smaller ads that people see as they're flipping through the paper – repetition is important.

2. *Keep the text short and simple.* A simple layout with a lot of white space is best. Use big headlines, and don't try to put too much information in one ad. Your name and the office you're seeking are the most important messages.
3. *Don't let the newspaper design your ad.* Newspaper artists are notoriously bad at making political ads. Instead, pay a professional graphic artist to design your ad (which will cost somewhere between \$500-\$1,000). If you can't afford that, have a volunteer who has some skill in design put together the ad in Microsoft Publisher, In-Design or other desktop software, make a pdf of the artwork and send it directly to the newspaper. Approve the final design and layout before the ad is printed. Call the newspaper in advance to find out the exact size the artwork should be.
4. *Be aware of newspaper deadlines and size requirements.* When compiling the media lists for your district, ask about deadlines for submitting ads and the cost of advertising. Newspapers sell space in "column inches", or you can request 1/4 page, 1/2 page, etc. Bear in mind 1/4-page ads vary in size from one newspaper to another.
5. *When compiling your media list, ask about each newspaper's policy of accepting political advertisements.* Some won't accept any political advertising. Others may require prior approval by the editorial staff of the paper—especially if you're running a comparison or attack ad close to Election Day. Get your ads to the paper well before publication deadlines.
6. *Use sharp, clear photographs.* If you use photographs in your ad, use the highest resolution shots you can find, or the results will not be pretty. Use action shots, if possible, rather than "head" shots.
7. *Coordinate newspaper advertising with other media.* You've hit a home run if a voter sees a newspaper ad, receives a direct mail piece and hears a radio spot all on the same subject. Be consistent with typeface and use your logo on all printed materials.
8. *Check state and local laws on disclaimer requirements.* Many states require "Paid for by Sally Candidate" at the bottom of the advertisement.

Here are some ideas for the types of newspaper ads you can buy:

1. *Announce public appearances/visits.* An ad can announce when you're visiting a certain town and what events you're having—a coffee at someone's home, breakfast at the local cafe, a walk down Main Street, etc. Give the appearance that you'll be all around town.
2. *Issues of interest to the community.* What issues are important, and can be targeted, to each specific community? Is there local concern about a new highway construction project or a plan to bring new jobs to the community? Heed the old advice that "all politics is local."
3. *Comparison advertising.* Draw a clear distinction between you and your opponent by comparing experience, stands on issues, etc. Don't be afraid to seize an opportunity to offer voters a clear choice.
4. *Endorsements.* An endorsement by either a local organization or by area residents is effective, especially in small towns and rural communities. A word of caution: be aware of what is going on in the area. You may be elated that the biggest banker in town has endorsed your candidacy, but you may want to reconsider if there have been a lot of farm foreclosures in the area.
5. *Promote voting.* Many county parties put together get-out-the-vote advertisements promoting local political candidates.
6. *Tabloids/inserts.* Rural and suburban weeklies and smaller daily papers don't have the barrage of advertising supplements that fall out of Sunday papers in urban areas. While this method is not as effective as direct mail, some candidates pay to insert tabloids in these smaller papers. These can be inserted for as little as a dime apiece (not including printing).

Remember: Keep your advertisement focused on one issue or subject. Don't try to communicate everything in just one ad.

Placing and buying newspaper ads

Unfortunately, some newspapers won't give you control over where the advertisement appears in the paper. However, if you can request a specific location, ask for placement in the front news section. Better yet, ask for space across from the editorial page. People who read editorials and letters to the editor have a greater

tendency to vote. In local papers, an ad across from news about local high school sports teams is also good.

People read left to right and top to bottom, so as a rule of thumb, the upper left hand of the page is better than the bottom right.

If you have an advertisement that's targeted to a specific voter group, use these guidelines for placement, as researched by the Newspaper Advertising Bureau:

- More men tend to read the sports section. (This could be useful for an endorsement ad by the NRA, for example);
- More women tend to read the lifestyle section. (This could be useful for an ad promoting your education program or an endorsement ad by Mothers Against Drunk Drivers.)

Newspaper advertisements are expensive, especially in daily newspapers with a large circulation. But the cost may be justifiable in a rural or suburban weekly or a smaller daily because the newspaper is where people get most of their local news.

Most states have newspaper associations that publish a website of advertising rates and deadlines for each newspaper. Use this as a guide when developing a budget, but check with each newspaper directly for current pricing information.

Also, newspapers ask for money up front to run political advertisements. You can use a credit card, but otherwise, they will not give you credit or bill you later.

Many groups publish newspapers for specific audiences: The Farm Bureau, American Legion and VFW, business journals, the Catholic Voice, etc. If voters in these groups are part of your targeted audience, it may make sense to buy space in these publications. Find out deadlines, size requirements, etc., just as you would with other newspapers.

Free publications such as the Thrifty Nickel and other shopping papers will often try to convince you to buy ads. These publications are usually not a good use of your limited campaign dollars because it's nearly impossible to target an audience. Also, there is little solid research on how many people actually read these publications.

Television Advertising

Local campaigns, who often have limited budgets, can't afford to produce television ads *and* buy enough airtime to ensure enough people see the ads to make a

difference.

One reason is the cost of production. Even a simple "talking head" ad can cost more than \$2,000. An ad shot on-location is going to cost a lot more.

Buying airtime, which varies greatly depending on the size of the market, can cost anywhere from \$15 (at 2:00 am) to \$5,000 for a prime-time commercial slot.

Most television ads are sold in 30-second increments, although campaigns buy 10- or 60-second commercials.

Generally, it makes more sense for local campaigns to rely on radio, newspaper, direct mail and other less expensive forms of paid advertising, unless you have lots of campaign funds.

Production costs

Production costs vary greatly depending on the size of the city where you live. Obviously, it costs a lot more to produce a television commercial in New York City than it does in Grand Forks, North Dakota.

On average, a 30-second commercial cost at minimum around \$2,500 to \$7,000 to produce. This includes writing a script, hiring a video crew, renting any necessary equipment, purchasing recording materials and simple editing. (Video crews often include a video photographer, a soundman and sometimes, a producer.)

Videotape is preferable if working with a small budget since the cost of film stock is higher than the cost of videotape. Of course, when you use videotape your ads don't look anywhere near as nice.

Using film costs as much as 50% more but your candidate will look a lot better. To get an idea of the difference, daytime TV shows (particularly game shows) are mostly shot on videotape while prime time programs are shot on film. Think of Jeopardy vs Game of Thrones: which looks better?

Finally, remember to check state and local laws on disclaimer requirements. In most cases, "Paid for by Friends of Sally Candidate" must appear on the screen for at least three seconds.

Producing your own commercial

Don't try this at home. A badly produced ad can lose votes and make your candidate a source of amusement.

If you must do this yourself, hire some experts to help you. A candidate's television

image must be professional and credible, so spending money to hire a production crew is a wise investment.

You don't want your ad to look cheap—bad television is worse than no television. A professional cameraperson and editor are the keys to a quality production.

Buying television time

If you've decided to use television commercials on network affiliates as part of your paid media plan, it is a wise investment of your campaign dollars to have a "media buyer" purchase your time. However, a knowledgeable campaign manager can place a small buy on cable with no problem, using the guidelines listed below.

A media buyer is someone who is generally employed by an advertising agency and has access to the comprehensive research that is critical to the success of your media plan. Media buyers can help ensure that your ads are seen and heard by your targeted voter groups.

When purchasing television time through a media buyer, be prepared to pay a commission for the service, traditionally 15 percent of the cost of the advertising buy. If you are buying a lot of TV time you can negotiate a lower fee.

Developing a media plan

Before you spend a single dollar on advertising, make sure your media buyer provides you with a written media plan. Although media plans vary, all should include these three elements: media information, cost information and media mix.

1. *Media information.* Your media plan should answer: who is watching a specific program at a specific time of the day; what stations are watched by the people in your area; and where people live who watch the stations.
2. *Cost information.* How much does a 30-second spot cost to reach your targeted voter groups? An advertisement bought during a high-rated show such as "Dancing with the Stars" costs a lot more than one bought on "All-Night Theater."
3. *Media mix.* What mix of media does my campaign need to reach my targeted voters? Have I formulated the right mix of TV, radio, direct mail, newspaper and display advertising? A media buyer advises your campaign on achieving the right "mix."

Ratings

Media professionals receive detailed information from research, which survey viewers to measure viewing habits.

The most well-known measurement used by these firms is the Nielsen ratings. The rating is a measurement of the percentage of television households watching a specific program. You've heard of programs that have been canceled because of "low ratings." Broadcasters use ratings to determine a program's monetary value: high ratings mean more expensive airtime for advertisers.

Using these ratings, a media buyer selects programs that are affordable and are watched by your targeted voter groups.

How much television is enough? Media experts believe that before your spots can create any presence on voter perception, they must be seen a minimum of seven times.

Media buyers look at what are called *gross rating points*. Each TV program is assigned an audience rating by Neilson in each media market. Each rating point is roughly equivalent to 1% of the media market. So a program with a 3 GRP rating is capturing roughly 3% of the market. When designing a buy, the media professional adds the ratings for all the programs purchased. The sum of all those program rating points gives you an idea of how much of the market you are reaching.

For example, if the buyer selected 10 programs with 10 rating points each, the total would be 100 GRPs or 100% of the market will see your ad once. So, in theory, buying 300 GRPs would reach 100 percent of your audience three times. Because of duplication, this isn't exactly correct: some people will see your spot two or three times and others won't see it at all, but it is a handy tool for measuring the market.

How many television commercials should your campaign buy?

Again, a voter must see your commercial a minimum of seven times to create at least a presence (700 GRPs). Buying 500 GRPs can provide a minimum impact; buying 1,000 GRPs can provide full impact—depending on the media market and the number of other political campaigns buying television.

For example, buying 800 GRPs in a smaller market such as Grand Forks, North Dakota, has a greater impact on voters than buying 1,000 GRPs in New York City.

Also, determine which other campaigns are buying TV time. If your area has more than six candidates buying time, you'll probably have to increase the number of spots you purchase. Why? So your spots won't get lost in the flood of other

candidate commercials.

For example, if a U.S. Senate candidate has purchased 15 spots a day, and you can only afford three, your message can be lost. If that's the case, and you can't afford to spend more money to buy more time, you may want to rethink your media plan. You may decide to reach other target audiences in different parts of the day or on other channels.

Cable Television

More and more state and local campaigns are purchasing spots on cable television. Media buyers can provide you with basic information and you can talk to your local cable company about rates and audience composition.

Cable television can be relatively inexpensive: some systems charge as little as \$15 a spot. However, the reason cable is cheaper is that the market is so segmented that not as many viewers are watching a cable channel in your district at any given time. 600,000 daytime CNN viewers sounds pretty good until you divide that up nationwide and realize only 138 people are watching CNN in your state house district.

A lot of people are watching cable, and because many programs are highly targeted to certain segments of the population, cable television may be a good supplement to your media buys if you have a message that is appropriate for these groups. Here's a chart showing recent ratings for the cable industry leaders:

Top 5 – Primetime (Total Viewers)

1. TNT (2,560,000)
2. FOX NEWS (2,244,000)
3. MSNBC (1,689,000)
4. ESPN (1,598,000)
5. Home & Garden (1,348,000)

Top 5 – Total Day (Total Viewers)

1. FOX NEWS (1,419,000)
2. Nick (1,086,000)
3. MSNBC (922,000)
4. TNT (902,000)
5. CNN (819,000)

The amazing thing is how much cable is driven by younger audiences (Nick, Toon, etc.) and how FOX News dominates the other cable news networks (CNN, CNN's

Headline News, CNBC, and MSNBC)

You buy cable like you buy radio, i.e., segments of time rather than specific programs. You can place so many ads during the morning, so many mid-day, some in the afternoon and some during prime time. The different time slots usually cost differing amounts on each network. Again, because of the complexity of the cable industry, it is best to use a professional media buyer to place your ads.

Graphics

Webster's defines "graphics" as visual images or designs on some surface, such as a wall, canvas, screen, paper, or stone to inform, illustrate, or entertain. Your graphics, or your logo, is your design. It is the face your campaign presents to the world.

Quality graphics are important because your candidate's name and the office she's running for should be used in "logo" form on all campaign materials as well as in all display advertising.

"Display advertising" is a term that describes the use of signs. The most common types are billboards; 4' x 8' and 2' x 4' signs; yard signs; bumper stickers; window posters; and lapel stickers/buttons.

Guidelines for designing graphics

1. *Make it easy to read.* Simple, bold designs grab the attention of the voter. When used on a yard sign, it should pass the "35 M.P.H. test"—can drivers easily see your logo as they're driving down a busy street?
2. *Use credible colors.* Traditional campaign colors, such as dark blue, red, green and burgundy invoke trust. Avoid using uncommon colors as the primary color in your logo.
3. Neon colors such as lime green and tangerine orange, while they glow in the dark, don't inspire confidence
4. *Avoid using pink*—it's too feminine even for female candidates
5. Marketing studies show the use of yellow as a primary color denotes "cheapness." (Notice how many discount grocery and electronics stores use yellow).
6. *Avoid using a photo as part of the design.* A logo builds name

identification—and that's what you want people to remember when they go into the voting booth. You don't want your candidate's logo to look like a "wanted" poster.

7. *Avoid clutter.* Stick to your candidate's name and the office he's running for. Message and themes are better communicated by other advertising mediums.
8. *Pick a typeface that makes your name easily legible.* Some names are harder to read in all caps. Names with lots of "L"s and "I"s are hard to read in some typefaces. Rare, exotic and homemade typefaces are hard to match and some printers will have trouble reproducing them.
9. *Larger fonts are usually better than smaller ones.* In graphic design, bigger usually is better.

Again, the important thing to remember about graphic design and your logo is that simplicity is a virtue. You want the viewer to see your name and understand it at a glance. You don't have to win any design awards to be effective.

Direct Mail

Advantages of using direct mail in a campaign

In many local campaigns, direct mail (also known as **voter contact mail**), is the most common, cost-effective way to communicate with voters.

Years ago direct mail consisted primarily of letters. Now, direct mail is more graphic and comes in many forms: brochures, booklets, flyers, postcards, anything that can be sent through the mail. Mail pieces with distinctive graphics, striking photos and attention-getting copy have proven impact with voters.

Unlike radio, television and newspaper advertising which reach voters and non-voters alike, voter contact mail enables you to directly communicate with just registered voters. Your campaign dollars are spent only on people who are eligible to vote for your candidate.

Direct mail can be targeted by party affiliation, age, sex, zip code and other factors to further stretch your campaign budget. Sending a specific message to a specific segment of the voting population saves money.

Along with door-to-door activities and telephone banks, direct mail is one of the best ways to personalize a campaign. For example, computer or laser printed letters can be addressed directly to the voter. Supporters and volunteers can hand address letters and endorsement cards to friends, neighbors and co-workers.

No matter what you plan to do, remember you'll have greater impact on voters if you coordinate your efforts. If a voter receives a direct mail piece, hears a radio commercial, views an ad on television, and sees you going door-to-door all on the same day, you've increased your effectiveness.

Finally, remember to check your state and local disclaimer regulations, and include that information on all printed direct mail.

Preparing a budget and a timeline for a direct mail program

Repetition and reinforcement are equally important in an effective direct mail program. One mailing to Republican voters in May won't win them over in November. Voters need to see a message many times before it has an impact. Spend time developing several direct mail plans, from bare-bones to the "Cadillac" version. Then, cost each plan out, following the guidelines listed below.

Some campaigns with small budgets may concentrate their efforts on the final four to six weeks prior to the election; others begin to implement their plans after Labor Day; others can only afford one or two mailings right before the election.

Sit down with each of the vendors you'll use to produce the mail for your campaign. Go over costs, schedules and potential conflicts. Pin them down. Insist that estimates on addressing, artwork, layout, printing and mail preparation are final, or at least within the range of the quantities and specifications you have provided.

Apply their estimates to your plan. Work with your vendors to trim costs without sacrificing impact or image. Unless absolutely unavoidable, don't cut the quality of the product. Be aware, however, that small changes in style, size, paper quality, folding or trimming may save you hundreds of dollars on each mailing.

If you can't raise the money to pay for your original mail program, and you've already cut production costs, consider these options:

1. *Take another look at your target audiences.* If necessary, it may be possible to mail to fewer voters without damaging program effectiveness.

2. *Try combining pieces.* Combine your positive image piece with an endorsement from a Republican official on the back panel. Collapse two or more contrast pieces into one larger piece.
3. *Ask someone else to pay for a mailing,* depending on your state's election laws. For instance, a friend of yours in Kiwanis may agree to send a mailing to the rest of the members in your club.

A word of caution: The fewer mail pieces you drop, the more likely the impact of that mail will be reduced. As each mailer becomes more complicated, the less impact each mail piece will have on the reader.

In direct mail, repetition and reinforcement are extremely important. Both negative and positive arguments must be repeated several times for maximum impact. To maintain effectiveness, deliver the same or similar messages two or three times.

Using direct mail to promote your message

1. *Establishing and increasing name identification.* Every time your campaign sends out a piece of voter mail or passes out a brochure, your candidate's names identification among the voting public grows. As the campaign builds credibility with community opinion leaders, press attention usually follows. As name identification increases, voter attention begins to focus on other elements of the campaign, such as the issues.
2. *Developing an image.* What impression do you want to create? You can communicate compassion, competence, responsibility, a willingness to serve, strong family values, etc., through direct mail. The use of photos is as important as text in an image piece. Not everyone will read even the most well-written text, but nearly everyone will look at the photos. Positive endorsement mailings by third-parties and/or opinion leaders will also develop your image. Spouse letters—often hand-written and printed—can also be effective in creating an image.
3. *Developing issues.* You can identify issues and establish your positions using direct mail. What issues are important to the voters in your area: Education, transportation, government spending, taxes, crime? Frame the issue, and communicate your position relying on effective photos and text.
 - i. Membership/shared interest lists can also be used to communicate your stands on the issues to specific groups of voters. For example, if education is a cornerstone of your campaign, consider sending a

letter to the teachers in your district.

- ii. "Issue specific" targeting is an effective way to communicate with voters, if you have the volunteers or the money. This method involves canvassing voters over the phone to find out what issue the voter's most concerned about and a follow-up letter targeted to this issue. For example, your phoner calls Margaret Jones and finds that she's undecided about who to vote for and very concerned about education. The campaign then sends a direct mail piece to her that specifically talks about your plan for improving education.
4. *Creating a contrast.* Use direct mail to communicate the differences between your candidate and your opponent. What makes one candidate better qualified to serve in office over another? What qualities does your candidates posses that your opponent lacks?
 - i. After your initial positive name ID/image mailings hit, it's a good idea to send a mail piece that creates a need for an alternative to the current leadership. You then can follow with a positive mailer that answers the need.
 - ii. Contrast mailers include comparison brochures that show position differences between you and your opponent on a variety of important issues. If your opponent has taken a bad position or cast a bad vote on a hot issue, your direct mail piece should focus and capitalize on this weakness.
 - iii. Respected individuals or affected third parties can help reinforce your attacks, adding credibility to your claims.
 - iv. If your opponent is an incumbent who has been saying one thing at home while voting differently at the state legislature, a mail piece that shows him flip-flopping will be effective. If your opponent has a poor attendance record, this may also be a good issue for you to use.
5. *Defending yourself.* Fend off attacks and misstatements from your opponent with direct mail. Remember, a lot of people think if they read it in the paper or hear it on the news, it must be the truth. Don't let attacks go undefended. The sooner you respond, the better. Direct mail can take longer to produce and distribute, but if the attack is widespread, consider this option.
 - i. For example, you learn that your opponent is about to mail a

devastating endorsement letter from a local law enforcement organization. You must be prepared to neutralize that endorsement mailing with one of your own—perhaps not in your original mail plan and possibly at the sacrifice of another planned mail piece.

- ii. You may find that your opponent's endorsement mailing is actually from a public employee union, which has endorsed your opponent because of his support for public employee benefits, not crime-fighting. If law and order is a hot issue in your campaign, send out a letter signed by "real" policemen that labels your opponent a captive of public employee unions, and if valid, soft on crime.

6. *Get-Out-The-Vote*. Direct mail can be used to turn out your supporters on Election Day. Campaigns can also use mail for absentee ballot programs, slate card mailings and other GOTV efforts.

Message vehicles your campaign can use

Depending on your strategy and budget, consider using a combination of vehicles to deliver your messages to voters.

1. *Palm card*. A palm card is a small flyer (it fits in your palm, thus the name) the candidate hands out primarily for name identification and image building purposes. Most include brief information on the candidate and her views on a few key issues.
2. *Brochure*. A brochure contains expanded, though generic, information about a candidate. Since your audience is broad-based, a brochure often gives more detailed biographical data and highlights your community and personal accomplishments. Brochures are most often used for door-to-door activities, at county fairs and other events attended by large numbers of voters.
3. *Self-mailer*. A self-mailer is a direct mail piece that is not sent out in an envelope—it "mails" itself. Self-mailers can be used to deliver all kinds of messages, targeted and general: name identification, image, issue, contrast, defense and GOTV.
4. *Targeted letter package*. Letter packages are used the same way as self-mailers—as a means of communicating targeted messages to the voters. For example, if you have a special appeal to senior citizens, consider sending a letter to all those voters over age 65. It's called a letter "package" because it could include a response devise, a flyer or even a picture of the candidate's family.

5. *Spouse letter.* Spouses can talk about the candidate and his fine qualities in a very different way than the candidate can. Spouse letters (both husband and wife) can be used to effectively communicate all the various messages: image, issue, contrast, defense and GOTV.
6. *Tabloids.* Tabloids are newspaper-sized brochures. Generally printed on newspaper-quality stock, they can be used to promote a variety of messages. Since they are inexpensive to produce, they're often used in mass door-to-door activities or as an insert in newspapers.
7. *Postcard.* Like other mail pieces, postcards can be used to increase name identification, develop image and issues, create a contrast and establish a defense. Because their size limits the length of the message they can carry, they are especially useful as a final reminder in your GOTV program.
8. *Jumbo postcard.* These are 8" X 10" self-mailers printed on card stock. They have the advantage of size and color, which makes them different, and more noticeable, from the usual pile of letters and catalogues.

Implementing a direct mail program

In this section, we'll review the steps you need to take to implement your direct mail program. For more information, refer to the specific sections listed below. These include:

1. *Targeting.* Which voters do I need to contact to win?
2. *List Development.* How do I communicate with the right voters?
3. *Copywriting.* What will my message be?
4. *Photography.* What photos will best communicate my message?
5. *Artwork and Graphics.* What should my mail look like?
6. *Printing and Production.* Who should print my mail?
7. *Mailing.* What steps should I follow to ensure my mailings reach registered voters in a timely manner?

Targeting

Every campaign has limited resources. Targeting prioritizes your district's voters—be it by demographic group or geography—so you can implement a direct mail program in those areas where it will have the greatest impact. Targeting defines those voter groups which are critical to the success of your candidacy.

Deciding what voter groups to target

Because every campaign situation is different, it's not possible to recommend a generic strategy for all campaigns. Some say you should "work from strength"—concentrating your direct mail efforts primarily in strong Republican precincts. Others say you should concentrate your efforts on areas where there's a high number of "ticket-splitters"—those who don't vote strictly by party.

You must weigh the variables of your political situation and answer these questions:

1. What are your strengths and weaknesses, as well as those of your opponent? Have you done opposition research—as well as research on yourself?
2. What is the political environment of your state and district? What is making "page one news" in your newspaper?
3. What voters do you have to reach to win the election? Have you researched past election results to identify potential areas of support?
4. Based on your budget, how many mailings can you afford? If you can't mail multiple times to your targeted voter groups, what other methods do you plan to use to reach the voters?
5. How good is your datafile? Some datafiles have all kinds of information about individual voters and some are rather skimpy. You can't send them mail if you don't know who they are.

Copywriting

The "copy" is the words that you use to tell your story and your reasons why the voter should vote for your candidate. It is the persuasive hook that sways the reader to follow the prescribed course of action. For maximum impact, the copy of the mail piece should be simple, clear and concise. The tone should be appropriate to the message of the piece. The following are general copy suggestions:

1. *Use clear, concise and direct language.* Use short, simple words in short, simple sentences. Complex sentence structure can confuse the casual reader.
2. *If your issue/message can't be written in short, simple sentences it's too complex for the mail piece.* Don't write above the reader's head.
3. *Copy should be easy to read and designed to grab the reader's attention.*
4. *Speak directly to the voter, to his needs, interests and beliefs.* Mail can be a highly personalized medium.
5. *Copy should mirror the overall message and theme of the voter contact program.* Don't send mail that heads off in an entirely new direction. The message of the piece should echo your radio spot or follow up a call from the phone.
6. *Choose the person to write your copy carefully.* Not everyone can write effective copy. The skills needed to write good direct mail copy are different from other forms of communication.
7. *In positive mail, use words that inspire warm, human feelings* such as "I," "We," "caring," "family," "community," "neighbors," and "tradition."
8. *Write using active, not passive, voice.*
9. *In negative and contrast mail, use colder words—"they," "ignore," "selfish," "unconcerned," and "unresponsive."*
10. *Avoid a shrill or harsh tone when writing negative and contrast mail.* Be calm, reasonable and rational in tone.
11. *Avoid using political slang or shorthand.* Many of your readers will not understand it.
12. *Use headlines to highlight key points.*
13. *Use "teasers" to grab the reader's attention.* Teasers are short copy/headlines or artwork designed to hook the reader. Teasers are usually found on the outside cover inspiring the reader to open the piece and read further.
14. *Use common language to describe your issues.* When writing about specific bills, don't use the bill number (HJR 1234). Instead, paraphrase the title or general

purpose of the legislation. The number of the bill can be used as a footnote to verify your information.

15. *Letters should be personalized as much as possible.* Avoid the use of address labels if possible. A window envelope is better than a label, a printed address is better yet, and a hand-addressed envelope is the acme of personalization.

16. *Issue pieces should persuade, not educate.*

17. *Oversized pieces and envelopes stand out better.* But be aware of extra costs.

18. *Make sure that every claim or charge can be supported with documentation.*

19. *Never fabricate or stretch the truth.*

20. *Proof your copy.* Errors detract from the impact of your mail.

Design and Artwork

Design and artwork should be clear, sharp, simple and attractive. The design should hook the recipient into picking up the piece and reading it. Consider these suggestions:

1. *If possible, use a graphic artist to help with the layout of the piece.* To avoid confusion, you should provide the artist with a rough sketch of what you want.
2. *Find an artist you can trust.* One who is politically compatible and who will get the work done when you need it. You can call your state party or other candidates for recommendations.
3. *Copy and layout design should work together to deliver the message with a "punch."*
4. *Design should be clear, clean and simple.* Read and look over the piece several times to be sure it's delivering the message you intended.
5. *Design elements and colors should match the other pieces of your voter contact program.* But don't make your pieces too similar or readers will assume they have already read your mailing last week.

Printing and Production

Hiring a direct mail firm to produce your mail could be one of the more important decisions of your campaign.

In a perfect world you would want someone to take your concepts and turn them into direct mail that is delivered on time to the right households. Yes, it is cheaper to do all this work yourself, but it hard to do it right, and the process is very time intensive. Even before you begin the steps below you should have established a budget for mail, estimated the costs and put together a timeline for mailing, and selected the target audiences. Assuming you are working with a mail firm, here are the steps from concept to impact:

1. Develop a concept for the first piece
2. Decide on the target audience for this piece
3. Gather the pictures you will need (or have them taken)
4. Write the copy for the piece (in coordination with the mail firm)
5. Have the piece paid out graphically with pictures and headlines
6. Edit everything it make it all fit
7. Proof read
8. Get approval from the candidate
9. Find a printer to print it (this should be done by your mail firm)
10. Proof the copy from the printer
11. Send the data file containing addresses to the printer (ditto)
12. Print the piece and address it (usually the same process)
13. Cut and dry the piece
14. Sort, seal (in some cases), bag (place in bags sorted by zip code), and tag (put a "political mail" tag on the bags).
15. Deliver to post office and pay for postage

Now wouldn't you rather have someone do this for you? Particularly if your campaign is going to send out ten mailings?

Here are some questions you should ask a direct mail firm before you hire them:

1. *Do they work with Republicans, Democrats or both?*

You would rather they not work with the other side for confidentiality reasons. You would rather not have your opponent know what mail you are planning or your mailing schedule.

2. *What other candidates have they worked for?*

You would prefer a company that has done this before, and it would be nice if they had handled races like yours. Political mail is different from selling soap so make sure they have handled other candidates.

3. *How many other clients do they have?*

If they have too many clients, you know at some point they will bog down and not be able to get mail out the door on time.

4. *Do they have an artist on staff or do they send their graphic work out somewhere else?*

It is better if they have someone on staff or at least nearby so that changes can be turned around quickly.

5. *Is your account rep the person who is going to be writing the copy, or is that someone else?*

Someone who knows you and your campaign will do a better job sounding like the voice of the campaign and your candidate.

6. *Will they participate in the councils of the campaign?*

The direct mail guy is just as instrumental to your success as the pollster and the media consultant, so they should be available for campaign conference calls and planning sessions.

7. *What is their estimate of the cost per piece?*

Find out and compare to other firms. But make sure you are talking about the same sized piece with the same type of paper, etc. Prices do vary and you can get good quality work at a fair price if you look around. Also, your mail firm may be able to suggest way to curb the cost of your mailings.

8. *Are there monthly fees?*

Most direct mail firms mark up production on each piece they produce by a few cents (more, if the number of pieces mailed is very small). You pay one price and they take care of paying the printer and the mail house (if they are not one and the same) and

usually the post office. Monthly fees are an exception and you shouldn't pay them unless these guys are fantastic.

Selecting a Printer

Assuming you did not hire a mail firm, selecting a printer is one of the most important decisions the campaign must make. Your decision could very well mean the difference between your mail reaching the voters on time—or two days after the election.

Finding a printer who's affordable and produces high-quality work

The key to finding the right printer is shopping around, even if it means using a printer outside the district. It's also a good idea to have a couple of back-up printers available in case the one you've selected runs into equipment or workload problems.

Check out your prospective printers carefully. Ask for work samples. Most importantly, ask for references (especially from other candidates), and take the time to ask each previous client if:

1. Projects were completed on time;
2. Quoted prices were dependable;
3. The printing was high-quality; and
4. The customer service was excellent.

Choosing the right printer depends more on service, quality, and price than it does on the size of the operation. Whether you decide to deal with a printer who owns a small shop or a sales representative of a large company, you still should ask the same questions:

1. *How quickly can they figure cost estimates?* If possible, ask for a binding estimate. Some printers will give you an estimate, and then add as much as 10 to 15 percent for overruns, small changes, etc. It's best to have an understanding up front.
2. *What is the turnaround time for a print job?*
3. *How conveniently are they located?*
4. *Will their staff pick up and deliver jobs?*
5. *Do they offer additional services such as layout and design?*
6. *Do they offer "mail house" services (addressing, sorting, and bagging mail for delivery to the post office)?*
7. *Will they set aside routine, non-time-sensitive jobs to get your mail out on schedule?* Your jobs must take top priority.
8. *Do they accept printing jobs from candidates of other party?* Ask

about security, and make sure you have a reasonable assurance your mail won't end up in your opponent's hands before it gets to the voters.

9. *What are their credit terms?* Most political work is strictly cash up front. However, some printers will allow a 30-day payment account.
10. *What kind of equipment do they have?* Printers who own "sheet-fed presses" can meet nearly every need of your campaign. Sheet-fed presses print one side of a large sheet of paper. After printing the first side and waiting for the ink to dry, the stack of paper is run through on the reverse side. Some presses can run two colors at a time. The paper is then cut and folded to become two to eight brochures or letters, depending upon the size of the finished product. Many projects can be printed on a "web-press" to save time and money, but web presses only make sense economically if you are printing a lot of pieces.

Desktop Publishing

You can save on composition costs if one of your campaign workers has a home computer with a desktop publishing program like Adobe In Design, Microsoft Publisher, Printmaster, PagePlus, or Xara Page and Layout Design. Camera-ready copy can be produced on these software programs, eliminating the need for your printer to do any typesetting or design.

Be careful, though, not to sacrifice quality and professionalism to save a few dollars. The lack of formal training in typography and design by your designer/typesetter can result in a less than attractive printed piece. Don't "settle" for something less than perfect—remember, it's your image that's at stake.

What's a "union bug" and do I need to use one?

A "union bug" is a small mark imprinted on your promotional literature, which signifies the piece was produced by members of a printers' union. If workers in your district or community are heavily unionized, look into having your printing done by a union shop.

Consider this story from the book Getting It Printed:

"Sometimes the little details can ruin a job. I remember the first time that I ran for city council, my campaign manager persuaded the owner of a chain of supermarkets to donate printing by their in-plant print shop. We could get 15,000 announcements

produced very fast for nothing more than the price of the paper. My constituency was very pro-labor, so we double-checked to be sure that the print shop employees were union. The shop manager, who had been there at least ten years, assured us that they were. When my announcements were ready, I noticed they had no union bug, and called the manager to ask about it. 'Oh,' she said, 'we're members of the grocers' union, not the printers' union.'"

Bear in mind that printing done by a union shop may cost 15 to 30 percent higher than a non-union shop. Budget accordingly after you've considered the political ramifications of union vs. non-union printing.

Postal Regulations

Postal regulations change all the time, so anything we print here is probably already out of date. If you use a mail house to send your mail you don't need to know much about postal regulations except how much postage costs, but even that is not simple.

Developing a relationship with your local postmaster can help ensure your mailings are delivered before Election Day—not after. While U.S. Postal Codes are standard, local postmasters may sometimes use different interpretations of these codes. In fact, if your campaign is planning on coordinating mass mailings, you'll want to have a volunteer attend a short training class offered by many post offices.

The important thing to understand is that Post Office mass mailing regulations are rules for the Post Office designed to minimize the need for humans to handle mail and maximize the ability of machines to process the mail. The post office also rewards customers for doing their work for them. Trucking the mail to a PO sectional center will drop the cost of postage for that mail. Sorting the mail by zip will save money as well. Postal carrier route will drop the cost even further. Therefore, the new rules benefit those who use computers to prepare mail and penalize those who do most of the work by hand. Your campaign can make the postal carrier's job a little easier, and by following these guidelines should help accelerate delivery.

The bottom line: new postal regulations are squeezing out do-it-yourself, volunteer mailers and forcing campaigns to use mail houses with modem computer processing capabilities and expensive new software.

As a rule of thumb, the best rate is: Standard Rate (A), Enhanced Carrier Route, non-automation compatible, delivered to the SCF for your destination area, with red tags. This will ensure the speediest delivery and cheapest rate. For detailed information, get a copy of the U.S. Post Office's "Max-it Guide" booklet.

Digital Media

Everyone is talking about “new media”- and how the Democrats, especially Barack Obama’s presidential campaigns, are using it to reach out, persuade, and collect potential voters and raise money. The use of new media is just another weapon in your arsenal when communicating with voters; integration is the key. In this chapter, we’ll go over the basics, from your website and social media, to online advertising and online fundraising.

Website

Your website is the central hub of the online campaign. While overall website traffic is declining relative to other Internet properties such as Facebook, your campaign website is still often the first place voters discover the ideas, issue positions and personal information of a candidate.

Think of your website as your “storefront window.” You need to invest in a credible, professional, and up-to-date website whether the race is big or small.

Websites should be extensions of the candidate’s themselves and should be easily navigable. In many cases, the simpler the website, the better. Don’t let some flashy web item or tool set divert voters from your message.

Your website should be simple but clear and concise:

1. *Your biography and photos.* Voters want to connect with candidates in a personal way and even feel that they know the candidate. Let voters know about the candidate’s family and even post some pictures of his family at home or at campaign events. Share personal interests as well such as hobbies, favorite foods, favorite books, etc. This is a good place to show that the candidate has personality and even tell a funny story or two.
2. *The position the candidate is running for.* Mention this several times.
3. *An Issues Page/Pages.* Keep your issues pages simple. You could record a video using YouTube or Blip.tv and post your stance on specific issues into your issues page. Cover all relevant issues well. Provide links to places where voters can find out more information about the issue itself. This is where the candidate can clearly express why he stands where he does. This is where he can explain why one value is more important to him than another. Use this section strategically.

4. *Links to your social networks.* Provide links to your ACTIVE social networks, e.g.: Facebook, YouTube, LinkedIn. If you don't think you will be able to keep your social networks active, it's best not to link to them.
5. *Blog.* Voters will enjoy interacting with you via your blog. Make sure to allow for moderated comments so that constituents can have their voices heard. Update your blog a few times a week. Have your friends and staff post on the blog as well so it appears that more people are interested. Keep a close watch on the blog for controversial comments and address them immediately. Interact with good or controversial comments in the next blog and engage the voters in good communication
6. *Introductory Video.* Let voters hear and see you through the use of an introductory video. In the video welcomes them to your website as you would welcome them into your home. These can easily be recorded and embedded into your website's homepage.
7. *Contribution Page.* It's easier than ever to collect money online so make sure your site maximizes every opportunity for fundraising. Many campaigns have a donation page pop up immediately before the voter can enter the site. Make it easy to donate by asking even before they can enter the site. If they choose not to donate they can click on into the website. Add a contribute button to the dropdown menu at the top of your page.
8. *Disclaimer.* Depending on your state, you will have to include a disclaimer on your website. Be sure not to forget it.

Domain Names

If you're even thinking of running for office you should register your preferred domain name and a few different forms of it. Domain names go quick, and there's a good chance that the one you want is already taken, so it's best to be far ahead of the game. If you wait until after you've announced to register your domain name, you could be surprised to find out that your opponent now owns it.

How to purchase a domain name:

GoDaddy.com

Go Daddy offers domain registrations for less than \$15. Registering your domain name

only will allow you to EVENTUALLY post a website there. It does not allow you to place anything on the site, which must be done through a web hosting company.

Some good web hosting companies

www.godaddy.com www.siteground.com

Both of these hosting services will “host” your site for you. This means that they will allow your website design on their servers. By purchasing a website through a hosting service, you will also be able to create multiple e-mail accounts at your domain name. (me@meforpresident.com). These e-mail accounts can be easily created through your hosting company and often are compatible with Microsoft Outlook, and your pda. Staying in touch with the campaign staff will be much easier if they all carry a blackberry with constant access to email.

Mail2web.com

Mail2web.com will allow you to pick up your campaign e-mail from any computer.

Website Design

Getting your website up is not a one step process and often takes up to 8 weeks from the date of your URL registration to when your site is operational. It's best to start early.

Finding a website designer

Large Design Companies

Most states have one or two large political web companies. Large political vendors often have multiple clients at one time and can work very slow in getting a design up and running. Larger design companies are also usually more expensive than smaller, independent designers. The upside of going with a large vendor is that you can be sure of the quality of their work by checking up on their references and trolling through their current sites via the web. Smaller vendors are usually better at customer service and the campaign can work directly with the website designer rather than trying to communicate with a large company. For most campaigns, big or small, it's a good idea to hire a professional firm to handle design; don't forget, your website is often the first impression the voting public will notice about your campaign.

Freelance

Candidates and their staff can post a regional ad asking for freelance web designers and telling their preferred price. Often they can even find a designer in or close to their district. Designers found on Craigslist and other popular classifieds are sometimes expensive and affordable.

The Local Party

Often local parties have worked with website designers for the party's local website or for a local candidate. Contact the local or state party to find out who they have used in the past. This is often the best way to find a website designer.

Costs

There are a few different costs associated with creating a website.

1. Registering a domain: \$10-\$20
2. Hosting your site: \$15-\$90 a year
3. Designing your site: \$200-up

Money-Saving Alternatives

Building Your Own Website:

Microsoft Expression (formerly Frontpage) is one of the more common, less expensive, ways to build a site. The software is easy to navigate and includes a lot of "how to" step by step guides on building a website. The software usually costs around \$300.

Maintaining the Website

It's good to have a super-volunteer or staffer to maintain your campaign website. If you had your website created by a designer, they will usually provide an easy to navigate control panel in which you can update your websites pages, blog, photo albums, etc.

Here's an example of a control panel which lets users easily change content:

Russell Prescott Website

Main Content Layout Users & Groups Extensions Site Admin My Preferences View Site Logout

Main

Shortcuts
[Manage Shortcuts](#)

Custom Shortcuts
[Modules](#)

Help
[Forums](#)
[Wiki](#)
[IRC](#)
[Module Help](#)

Content
 This is where we add and edit content.
 Subitems: [Pages](#), [Image Manager](#), [Global Content Blocks](#), [File Manager](#), [A.Berg Flash Gallery](#), [Blogs Made Simple](#), [Calendar](#), [News](#), [News Flash Scroller](#), [Photo Albums](#), [Printing](#), [RSS2HTML](#)

Layout
 Site layout options.
 Subitems: [Templates](#), [Stylesheets](#), [Menu Manager](#), [Theme Manager](#)

Users & Groups
 User and Group related items.
 Subitems: [Users](#), [Groups](#), [Group Assignments](#), [Group Permissions](#)

Extensions
 Modules, tags, and other assorted fun.
 Subitems: [Modules](#), [Tags](#), [Events](#), [User Defined Tags](#), [Module Manager](#), [CMSMailer](#), [Form Builder](#), [Search](#), [TinyMCE WYSIWYG Basic](#)

Site Admin
 Site Administration functions.
 Subitems: [Global Settings](#), [Page Defaults](#), [Admin Log](#)

My Preferences
 This is where you can customize the site admin area to work the way you want.
 Subitems: [My Account](#), [User Preferences](#), [Manage Shortcuts](#)

View Site

Logout

Promoting Your Website

Now that your website is up and running, how can you promote it? Unless you invest in web promotion you cannot expect visitors to find you online.

Campaign Materials

Don't be afraid to advertise your own website. Your flyers, pamphlets, business card, and yard signs should all include your website address. This way voters will become accustomed to attributing your website with you.

Blogs

If you're actively engaging the blogosphere you can send traffic to your site by entering your website as a referring link.

Leave a Comment

Name (required)

E-mail (will not be published) (required)

Website

Comments

Submit Comment

Regular bloggers and web readers will often click your hyperlinked name to look at your website.

Social Media

If a tree falls in the woods and nobody's there to hear it, does it make a sound? Even the best message is muted when there's no one around to listen.

That's why every digital campaign should "fish where the fish are" - that is, by talking to prospective voters and donors where they tend to spend their online time. As overall website traffic continues to decline across the Internet, social media engagement continues to grow. Your campaign communications strategy should thus focus on major social networks like Facebook, while ensuring that specialized auxiliary networks like Twitter, Instagram, and YouTube are well positioned to achieve your strategic goals.

Your Facebook plan should be shaped to identify, capture, and inform potential activists, voters, and donors through tailored messages targeted toward specific interest groups you need to reach. As your campaign builds a Facebook following, you can also convert these "likes" into do-ers and donors by mining for email addresses through online petitions, surveys, polls, and other creative calls-to-action.

Building a strong YouTube presence is also essential to having your video content seen and shared by as many people as possible. Most campaigns will want to develop a branded YouTube Political Channel to showcase ads and videos. YouTube advertising can also be an effective medium for many campaigns to boost impressions for budget prices--in some cases, even as low as few cents per view.

Twitter is another key social media and micro-blogging service that allows users to send "updates" (or "tweets") to the Twitter website, via short message service (e.g. on a cell phone), instant messaging, or a third-party application such as Facebook. Campaigns can use Twitter to identify key conversations and immediately start "talking" to opinion leaders, interest groups, and voters. It's an easy opportunity to directly engage with your voters and activists.

Online Advertising


Done properly, online advertising can deliver some of the best ROI of any medium you will use. The key to getting started with online advertising is to know your goal, and craft your advertising plan around that. Are you trying to promote your website? Raise your name ID? Raise money? Or prospect for new email addresses? Be crystal clear about your specific goals and plan your resources (e.g. budget, staff/consultants, time) accordingly.

Facebook Ads

Most campaigns should begin with Facebook ads. Facebook has significantly expanded its place on the online advertising playing field in part because ads on the social network can be easily targeted voters and activists based on the interests and demographic characteristics they've listed in their Facebook profiles ("men aged 25- 34 who like football" would be an targetable group, for instance).

Facebook ads are relatively easy to buy — anyone with a Facebook profile and a credit card can set up a campaign. However, a qualified media buying firm with political experience is usually a wise investment to maximize your advertising buy.

Second, the creative elements are equally simple, with a small image and a few words of text, along with a "Like" button and a link to the appropriate landing page (ads can point to a Facebook page or to an outside website).



The image is a screenshot of a Facebook news feed. On the left, there is a navigation sidebar with sections for 'FAVORITES' (News Feed, Messages, Events), 'PAGES AND ADS' (Ads), 'APPS' (Photos, Washington Post Social, Apps and Games), and 'GROUPS'. The main feed area shows a post from 'Urban Outfitters' with a 'It's Friday.' post and a 'The X Lounge' post. On the right side of the feed, there is a 'Sponsored' section containing three advertisements: 'Press The President US', 'SCMBX-DWS Muni Bond Fund', and 'Little Black Bag'. An arrow labeled 'Facebook Ads' points to the sponsored section. The top of the page shows the Facebook logo, a search bar, and user profile information.

Google Ads

The second common online advertising channel is Google. Your campaign can purchase ads and serve them to potential voters and donors when they search on your name.

Google also sells text ads on thousands of sites across the web, also targeted based on the content of their individual pages, and similar ad networks have sprung up as well.



The image shows a Google search interface with the search term "keith fimian". The search results are displayed under the "Web" tab, showing results 1 through 10. The first result is "Keith Fimian for Congress" from www.KeithFimian.com, which is circled in red. Below it are several other results, including "Keith Fimian for Congress - Preserving Virginia's Prosperity", "Keith Fimian for Congress - Join the Team!", "Keith Fimian - Congresspedia", and "Keith Fimian, Va-11, and the Millionaire's Amendment".

Google

keith fimian Search Advanced Search Preferences

Web Results 1 - 10 of all

Keith Fimian for Congress
www.KeithFimian.com Help Elect Keith to Congress: New Leadership for Virginia!

Keith Fimian for Congress - Preserving Virginia's Prosperity
Keith Fimian for Virginia's 11th District. Together, we will fight to preserve America's Prosperity, Peace, and Security.
www.keithfimian.com/ - 15k - Cached - Similar pages - Note this

Keith Fimian for Congress - Join the Team!
Thank you for your interest in Keith Fimian and the campaign for the 11th District. By completing the form below, you will be contacted regarding upcoming ...
www.keithfimian.com/jointheteam/ - 25k - Cached - Similar pages - Note this
More results from www.keithfimian.com »

Keith Fimian - Congresspedia
Keith Fimian is a Republican candidate in the 2008 congressional elections for the 11th Congressional District (map) of Virginia. ...
www.sourcewatch.org/index.php?title=Keith_Fimian - 33k - Cached - Similar pages - Note this

Keith Fimian, Va-11, and the Millionaire's Amendment « Renaissance ...
Feb 6, 2008 ... With the retirement of Tom Davis and the failure of a long list of potential candidates to post, many folks have decided Keith Fimian is The ...
renaissanceruminations.wordpress.com/2008/02/06/keith-fimian-va-11-and-the-millionaires-amendment/ - 50k - Cached - Similar pages - Note this

Keith Fimian - Wikipedia, the free encyclopedia
Keith Fimian is currently the Republican candidate for the United States Representative from

Blogs

A blog is a website, updated by one or more primary contributors with a variety of written, video, or audio posts that relate to a general theme or overall campaign narrative. Blogs have become an effective tool for supporters of a cause or candidate to editorialize their opinion and allow their voices to be known without the fear of censorship. They are also an effective tool for rapid response to breaking events and incoming attacks. Essentially, the mainstream media is taken out as the middleman, and "bloggers" (people who use blogs) are able to quickly publish their opinions. Blogs are low cost and very easy to assemble.

Starting a Blog

1. *Decide on a topic.* The most popular forms of blogging include “free-form”(in which the author writes about whatever interests them at that moment) or “structured” where the blogger selects a single theme (be it political, religious, community oriented etc.) and tries not to stray too far from it. By structuring a blog with a single topic, writers can cultivate an audience base who will keep coming back to read posts that interest them.
2. *Find a provider.* Providers are websites that specialize in setting up blogs for use. Some providers are free (Blogger.com, LiveJournal.com, Blog-City.com) while others charge a fee for more features like graphics and music. The cost of providers varies with one-time rates from \$1,000 to \$2,000 for a custom designed blog.
3. *Set up your blog.* The blog providers make this a fairly easy process. You can start off using the provided templates and play around with different colors, themes, etc. However, your campaign should decide if it makes more sense to contract this work out to a qualified firm who specializes in digital media. It may not be a good use of your time to set up the blog.
4. *Write a few posts to test it out.* Start with a schedule for posts. Keep your posts short. Stick to what you know. You probably take for granted that you have a great deal of specialized information that others will find helpful-possibly even fascinating. Let your readers know why you started your blog and what topics you will discuss. Test your blog content to determine which materials is most effective with your target audience: long form vs. short form, graphics vs. copy, original material vs. reposts of third party content etc.
5. *Add the bells and whistles.* The best way to find out what is available for your blog is to explore other blog sites. Look at as many blogs as you can relate to your topic. Pick and choose which features (text, pictorials, banners, polls, discussion boards, links, videos, search capabilities, etc.) you want to include in your blog.
6. *Publicize your blog.* When leaving comments anywhere online, leave your blog address. Email your blog address to your friends and family. Encourage them to forward it to their email lists.

Building Relationships with Bloggers

1. *Research friendly/unfriendly blogs.* There are thousands of blogs covering every possible subject matter. Do your research and find which ones tend to agree with your positions and which ones might be opposed. Use blog search engines to discover if there are bloggers already discussing your race. Search your name on Technorati.com and on Google blog search.
2. *Reach out to your friends.* Contact bloggers who are likeminded. Post links to other blogger's blogs on your page. Establish a dialogue with them and be an active participant on their blog by posting comments or suggestions. A good place to start is by checking out a list of state-oriented blogs at www.blognetnews.com/YOURSTATE.
3. *Contribute your own unique input.* Bloggers love original and unique content to post on their blog and will be eager to work with you. The blogging community tends to foster a culture of cooperation. If you feel like your writing needs critiquing, email to a fellow blogger. If asked, reciprocate without reservation.

Effective Blogging Tips

1. *Reinforce your strategic message.* When you decided to start a blog you had a specific goal or idea in mind of your audience, the topics you would discuss and how you would discuss them. Always come back to your central message. If your goal is to promote a candidate then keep your focus on issues, ideas, events, and people of relevance to your candidate.
2. *Guide the conversation and push your message.* Be out front on issues and put your own "spin" on events.
3. *Motivate your supporters.* Use your blog to "rally the troops" to your cause. Be sure to point out superior achievement by any volunteers. By lauding your supporters with gratitude, you can motivate others to work hard and go beyond the call of duty.
4. *Harness their energy.* Encourage your viewers to re-post your information on other blogs and in comments sections of online newspapers, etc.

5. *Help them help you.* Tell your viewers what you want them to do and make it easy for them to do it: call and protest, write a letter, send money, come to an event, etc.
6. *Frequent updates.* This is probably the most important thing to remember if you want to have a successful blog. You must post regular updates or else your viewers will lose interest and not come back to your blog. Set a time to blog and stick to it. Chronic blogging may seem hard at first but eventually you make find it addictive.
7. *Keep it interesting.* Don't be afraid to let your personality show through your writing. If your writing is too formal, your blog will sound more like a news report. Show your sense of humor and other human foibles. This will help endear you to your readers.

Podcasting

Podcasting is a series of audio clips posted to a website that are available for download to computers or personal audio devices (iPods, mp3 players, etc.) for the listener to enjoy at their convenience.

1. *Podcasting is essentially the same as blogging,* except in audio and occasionally video form.
2. *Many podcasts are coupled with written blogs* as a supplement or as an added service to the subscriber.
3. *Podcasts can vary in length from a few minutes to more than an hour.* To keep the attention of subscribers, pod casts are generally quick and to the point (about 10 minutes).
4. *Good recording quality is essential to a podcast.* Make sure that the sound quality is good so that the listeners can clearly understand all that is being said.
5. *Easy accessibility is also important.* Make sure the audio or video links are easily accessible and downloadable. By saving your audio files in a format that is universally recognized by computers (WAV, AVI, MP3 etc.). You can save your file to the proper format by right- clicking and selecting "Save As" then choosing a format to save in.

6. *Bring in guest commentators.* Additional voices always deepen a dialogue and make for lively conversation. Try inviting a wide variety of people who support your candidate.

Creating a Podcast

Podcasting, in some circumstances, can be a very effective tool for a campaign. However, you will also need to determine if it's an appropriate tool for *your* campaign. If your campaign is short on time, staff, technical know-how, and budget, you may determine that podcasting is not the priority.

A podcast can be structured in numerous ways. It can feature interviews with guests real or imagined. You can tell a story about your day or something fictional. The only limit is your imagination. There are five key components in creating a podcast.

1. *Craft a plan.* Think hard about what you want to communicate and who you want to communicate it to. Think about what you will be able to contribute to a podcast. Do you have technical knowledge? Are you a good speaker? While some people are gifted enough to improvise and remain interesting, most of us need a script to help us along. A plan will help keep you on message. Create a plan to fit your individual situation.
2. *Make sure you have the hardware necessary.* A recent version of Windows or Mac OS will make the process easier. Make sure to get a high-quality microphone (\$30-50 from Best Buy). You can plug your microphone headset into your computer's USB port and start speaking.
3. *Use a software platform designed for recording audio.* A popular program named "Audacity" is easy & free to download. This nifty file allows you to edit and tweak your podcasts before and after recording. Audacity is available at <http://audacity.sourceforge.net/>
4. *Convert your podcast to a universal format.* You want your podcast to be formatted into an easily sharable file. Listeners won't download huge files that might take almost as long to retrieve as they do to listen to. Your best bet is to make your file into a MP3 or AAC. The easiest way is through iTunes. Download a free version of iTunes at www.itunes.com
5. *Publish your podcast.* You need to create a broadcast feed on your website. This is known as an RSS feed and is addressed in greater detail in the section

Promoting Your New Media. For the moment, let's just say that an RSS feed is like a website link to your podcast. If you are an iTunes subscriber, you might want to use their service to publish. If not, check these websites such as *Feedburner, Typepad, Blogger or Liberated Syndication*. Any of these websites should get your podcast out of your head, onto the Internet, and into someone's ears.

6. *Podcast via Phone.* Free sites such as Gabcast.com and Drop.io allow users to easily create podcasts using their cell phones. After signing up, users are given a phone number and pass code where they can call in and record lengthy pod casts. Immediately after recording, your phone conversation is turned into a podcast and similar to YouTube, you're given a code with which you can embed the pod cast straight into your blog or website!

Promoting Your New Media

RSS Feed

RSS is a type of news feed for web content. By adding RSS to your blog or podcast, subscribers are automatically updated when new material is posted. This will help engage your subscribers and keep them current with your media. Here are some websites that offer tutorials on RSS Feeds; the last is geared toward podcasts:

<http://searchenginewatch.com/showPage.html?page=2175271> <http://www.make-rss-feeds.com/making-an-rss-feed.htm> http://www.podcast411.com/howto_1.html

Cross Media Branding

A terrific way to promote your media is to have it link from other sources. Link your social networking profiles to your blog and vice versa. Have friends post links to your sites *quid pro quo*.

Traditional Marketing

Don't be afraid to mention your new media in traditional formats. Many businesspeople will include websites, blogs, and their social networks on their business cards, email signatures, letterhead and more. These traditional methods of marketing serve as great promoters of new media, especially for those who are not completely in tune with the digital world.

Campaign Communications

Communication among members of a campaign staff is critical to a well-organized campaign.

The candidate and their staff should be able to keep in touch with each other through e-mail communication which can be inexpensive.

Personally, branded e-mail addresses are easily created through your web hosting company. If you own "lizforsheriff.com" than you will easily be able to create multiple e-mail addresses with yourname@lizforsheriff.com.

Mobile

Make sure you approach your digital campaign with a "mobile first" attitude. Your voters and donors will expect to engage with your campaign via iPhones, iPads, Androids and other mobile devices. So it's now essential to optimize your campaign website, donation pages, landing pages, and digital properties for mobile marketing as well as laptops and desktop visitors.

Online Fundraising

Like it or not, campaigns can't be successful unless sufficient attention is paid to fundraising. Online fundraising can be a powerful way for campaigns to raise sustainable grassroots contributions. In most campaigns, online fundraising should not be your sole source of funds.

If online fundraising is an appropriate revenue source for your campaign, you must think email first. Facebook, Google, Twitter and your website will all have valuable roles to play in the complete and integrated online fundraising program. However, you simply can't expect to raise significant money online without an email-centric strategy. That's not to say that social media alone can raise funds for a campaign, but Facebook and Twitter are no substitute for building a large, active, and organically built e-mail fundraising list.

List Building and Management

You should avoid purchasing email lists for your fundraising work. While purchasing email voter files is a time-tested tool for voter contact, it's not an effective tool for online fundraising. Focus on cultivating new potential donors and building your list organically through event signups, online advertising, and cross promotion in your offline work. From the onset, all candidates and campaigns should be collecting email addresses from

their supporters when they collect addresses and phone numbers. “E-newsletters” are a quick, easy, and inexpensive way to update donors and supporters. E-newsletters can also be an effective forum for making supporters feel more involved with the campaign.

Campaigns should use social networks for “mining data” about supporters to acquire new email addresses, build supporter lists, prospect for donors, and “talk” to their base in multiple ways, simultaneously.

List Management

Do your homework and research options for blast email management software. Some popular political list management tools include Aristotle and i360. For smaller campaigns, Mail Chimp and popular commercial options may be suitable.

Email Fundraising Content

Effective email appeals should be urgent, timely, emotional, and deadline driven. Pay close attention to each aspect of the email including the signer, the recipient, the subject line, the issue, and most importantly, the message to determine what resonates. Parallel major milestones in the campaign like FEC deadlines, fundraising goals met or the candidate’s birthday. Successful direct mail messages can sometimes work as emails.

Metrics

Online fundraising is equal parts message and metrics. Research and learn the basic metrics of online fundraising (i.e. open rates, click through rates, cost-per acquisition).

Online fundraising can be a valuable way to raise grassroots donations for many campaigns. However, fully integrated online fundraising is very specialized work, often requiring services of a copywriter, a graphic designer, a programmer, and media buyer. Some campaigns, especially larger ones, should consider hiring a consulting firm who specializes in online fundraising.

Earned Media

In this section you'll find step-by-step advice on putting together a solid and effective earned media program. This includes: the five elements of political communications, dealing with reporters, developing media lists, writing news releases, setting up news conferences, and more.

Communications Basics

Following these Communications Basics, you will find specific sections giving you ideas about beefing up your earned media program using **Newspapers, Radio and Television**.

You'll also find paid media guidelines in the **Paid Advertising** section of this manual. If you read nothing else, please take the time to review these ten communications **DOs and DON'Ts**:

DO...

1. *Be able to articulate the reason you are running for office, how you're going to win and why people should vote for you.* If you stumble on these key questions, your campaign is in trouble.
2. *Prepare a "life-and-times" bio.* This should be a lengthy, narrative autobiography to highlight your accomplishments, goals and values. Use it as a reference for writing a briefer biography for other uses, announcement speech and campaign materials.
3. *Know what news is.* Find out what editors want—and give it to them. Be accurate, timely and quotable.
4. *Deal in facts.* The news media aren't interested in unsubstantiated opinions. Use numbers: "Taxes on working families have gone up by more than \$1,200..."
5. *Make your press releases look professional.* Since almost no one puts a release on paper anymore, that means you will need an attractive "letterhead" for an emailed release, a strong subject line, proper grammar, proper spelling and newspaper style. Keep your release to one page written in an active, not passive style. Proofread, proofread, proofread.
6. *Keep statements and answers short and to the point.* Most radio and TV stations use a 30-second, or less, "sound bites." You should practice answers to the most commonly asked questions ahead of time.
7. *Think visually.* You'll garner better TV and newspaper coverage if there's an interesting visual background. A news conference about housing is a lot more interesting at a construction site than behind a podium at a hotel.
8. *Stick to your major campaign themes.* If a reporter asks you a question on another subject, you should pivot to an answer that repeats your main themes.

9. *Issue a news release and radio actuality after every newsworthy speech.* A speech to 30 members of the Lions Club can become a statement read or heard by 10,000 people if the news media picks it up. Also, post the news release or actuality on your Facebook or other social media sites.
10. *Tie your earned media into your paid media.* Reinforce your campaign themes in your news releases, speeches and promotional materials. You'll score points with voters if they read an article about your candidate's "five-point plan to fight crime" in the newspaper, hear about it on the radio, see it on the six o'clock news, and see it explained in a direct mail piece.

DON'T...

1. *Don't tell a reporter something you don't want reported.* If the story's juicy enough, "off-the-record" will go down the drain. With radio and TV reporters, always assume the microphone is on.
2. *Don't exaggerate resume items.* Every single item contained in a campaign biography must be the truth, the whole truth, and nothing but the truth. Failure to follow this rule will mean certain embarrassment if not defeat.
3. *Don't ignore the media.* Spend time with reporters, especially those at weekly newspapers. Your campaign must make the reporter's job easier. Have the candidate call into radio talk show programs or appear on radio call-in programs. Remember, silence is not golden when you're a candidate.
4. *Don't feel compelled to respond to a reporter's exact question.* Remember to tie the answer into your campaign themes. The basic rule is: A reporter can ask any question he wants; you/the candidate can answer any question you want. And remember to use your own language in your answer; don't mimic or repeat the language in the question.
5. *Don't ever speak badly of your friends in the media.* If a reporter repeatedly shows a bias against your candidate, don't make demands or accusations. Ask to discuss it with him or his editor. Remember the old saying, "Never argue with someone who buys ink by the barrel and paper by the ton."
6. *Don't try to bluff your way through an answer.* If you or the candidate doesn't know the answer, tell the reporter you'll call her back later with the information.
7. *Don't wear patterns, stripes or checks for television appearances.* Stick to dark colors, such as navy blue and gray. Men should avoid loud neckties; women should avoid layers of jewelry.
8. *Don't schedule group news conferences.* You won't make an impact if your candidate shares the spotlight. If you bring experts or VIPs to support your campaign, tell the media they'll be available after the conference.

There are some exceptions to this rule: for example, if you are holding a news conference to announce an endorsement from a governor or mayor, you clearly want to feature them in the news conference.

9. *Don't go on cold, whether at a news conference or speech.* Practice beforehand and have a prepared statement to hand out to the media.
10. *Don't feed the media material you know they won't use.* If you "cry wolf" too many times, the media will start to ignore you altogether.

The Five Stages of Political Communication

There are five related communications stages of a campaign that can be promoted through a mixture of paid and earned media techniques:

1. *Establishing and increasing name identification.* Every time you issue a news release, make a speech, buy a political ad, etc., you strengthen your candidate's name identification among voters. However, display advertising—such as yard signs, bumper stickers, billboards and 4 x 8s—is used most commonly and effectively.
2. *Developing an image.* What impression do you want to create with voters? You can communicate compassion, competence, responsibility, willingness to serve, strong family values, etc., through both earned and paid media. However, display advertising is strictly for name identification.
3. *Developing issues.* You can identify issues and establish your position using paid and earned media. What issues are important to the voters in your area: education, transportation, government spending, taxes, and crime? Frame the issue and communicate your position.
4. *Creating a contrast.* Communicate the differences between you and your opponent using paid and earned media. What makes you better qualified to serve in office? What are your opponent's weaknesses?
5. *Defending yourself.* Fend off attacks and misstatements from your opponent by using paid and earned media. Remember, a lot of people think that if they read it in the paper, hear it on the news or read it on a trusted Blog it must be the truth. Don't let attacks go unanswered.

Depending on the attack, the sooner you respond, the better. Newspaper, radio, television and e-mails enable you to respond quickly to a charge. Direct mail can take longer to produce and distribute, but if the attack was widespread, consider it an option.

Earned Media

"Earned media" refers to the news your campaign generates via your announcement speech, press releases, news conferences and other public statements that are covered by newspapers, radio, television and the Internet.

Earned media is generally more effective than paid advertising for two reasons: 1) It has added credibility because it's from a source of information outside your campaign, and 2) It is an investment of time and effort, but not a lot of campaign dollars.

News Checklist

While there are no hard and fast rules to determine exactly what constitutes news, check to see if your idea for a story answers these questions affirmatively:

- Is your event or statement out of the ordinary?
- Is it timely?
- Is it controversial?
- Does it have local appeal?
- Is it emotional?
- Is it big?
- Is there an element of conflict?
- Does it involve celebrities?
- Does it mention local folks?
- Is it what people are talking about?

Remember: these characteristics aren't exclusive of one another. The more you can include, the greater the chance your activity or announcement will make the news.

Dealing with Reporters

Contrary to many people's opinions, reporters are just like everybody else. For the most part, reporters try to do a fair job of reporting the news.

Occasionally, under the pressure of deadlines, they're prone to error. They have biases like anyone else, and they are often liberal, but that doesn't mean they are dishonest.

Reporters have a complex, sometimes adversarial, relationship with people in the

news, especially those in politics. Following these guidelines should help build and nurture your relationships with reporters:

1. *Don't treat reporters like the enemy.* It's critical to keep an open mind. Regardless of how unfair you think a particular reporter has been in the past, wipe the slate clean as you set up your earned media program. If you start off with an antagonistic attitude toward the media, they will probably respond in kind.
 - a. Most reporters try to be fair. Our evaluation of what's fair or unfair is made through tinted glass: as Republican or Democratic partisans, we're not the most objective people ourselves.
 - b. Rather than approaching the media from a hostile perspective, try to view reporters as allies in getting your message to the voters.
 - c. Develop a good professional rapport. Sometimes that means spending valuable time with a reporter only to see absolutely nothing reported in the next day's newspaper. Eventually, however, the investment will pay off.
2. *Remember that reporters do make mistakes, just like we all do.* They also have families and outside interests. If you avoid making it a chore to cover your candidacy and keep in mind that reporters are not one-dimensional, you have a better chance at developing a good professional relationship with them.
3. *Be professional.* If you want reporters to respect you and your campaign, you must act like a professional. Never send out a news release containing typographical errors. Provide ample notice of events you want the media to cover. If reporters cover your event, remember that they are your guests and treat them accordingly. Provide sufficient background information for news conferences. If you promise to get back to a reporter with the answer to a question, **always** respond before the reporter's deadline, even if it is to tell him you don't have the information yet. Most importantly, don't feed the media material you know they can't use.
4. *Be honest and accurate.* The easiest way to destroy a professional working relationship with the media is to stretch the truth or lie. If you (the candidate or campaign) are asked a question about a topic you know nothing about or for which you have no answer, it's better to say you don't have an answer yet than it is to say something foolish. You can't be expected to have the answer to every question a reporter might ask. Don't try to bluff your way through.

- a. Lying will get you in trouble. There are those rare times in every politician's life when answering a question truthfully would be politically damaging. When this occurs, try telling as much of the truth as you can. If all else fails, respond with a simple "no comment." By the same token, little is gained by refusing to release information that will eventually be made public. At least if you're the one to release the information, you can give your side of the story.
 - b. Let's say you're planning a fundraiser and a reporter asks how many guests are expected. If you inflate your anticipated turnout, what happens when the reporter attends and discovers only half as many people are present? The likely headline in the following day's paper is "DISAPPOINTING TURNOUT AT POLITICAL FUNDRAISER."
 - c. It might be better to err on the conservative side, quoting a number slightly less than the crowd you expect, thereby creating a more favorable headline such as "LARGER TURNOUT THAN EXPECTED AT FUNDRAISER."
5. *Be responsive.* Provide timely, accurate news in a usable form. Be honest and accurate, and respond quickly to a reporter's questions. If you have information about a topic of interest to a reporter, even if it is unrelated to your activities, let him know. If he gets a story out of it, you've scored points.
 6. *Don't pick a fight with someone who buys ink by the barrel and paper by the ton.* Regardless of how much you disagree with a particular story, remember that the media always has the last word. If a media organization reports a factual inaccuracy in one of its stories, you have every right to request a correction. For example, if your local reporter writes that your upcoming fundraiser is going to be on Saturday at 2:00 p.m., when it's really scheduled for Sunday at 5:00 p.m., by all means, correct the mistake. But if a reporter who is covering the event writes that your candidate delivered an uninspiring speech, don't expect him to change his mind because you get angry with him.
 7. *Make it easy for reporters to do their jobs.* Reporters are busy people. Your story is probably only one of many stories they have to cover on a given day; you'll have a better chance of getting coverage if you make it easy to cover your story. For example, if you fail to put an e-mail address on a news release and a reporter has a question, don't expect him to take the time to find you. The reporter may choose to file an easier story and throw your release away.
 - a. You can help reporters by giving them good, newsworthy information and making it as easy to cover you as possible. Return reporters' phone calls as

soon as possible. Ask your reporters what kind of stories they like to cover and give them what they want. Keep in mind, however, that in their effort to get the story, reporters will use information about your campaign whether or not it is to your advantage.

8. *Develop a rapport with local reporters.* Building rapport is a continuing process. To help strengthen your relationships with reporters, consider doing the following:
 - a. Visit reporters where they work. Candidates are always asking to be covered at news conferences, speeches and other events. Instead, stop by a reporter's office when you're visiting in the community, just to say hello. Set up these meetings in advance to avoid arriving when a deadline is approaching.
 - b. During your initial meeting, give the reporter a media kit, if you haven't already distributed it prior to your announcement.
 - c. Once you've made an initial visit, be sure it's not your last. Telephone to stay in touch. Put the reporter on a list to receive email blasts (if appropriate).
 - d. Let a reporter know when she does a good story. We're quick to criticize what we judge to be a poor story and rarely take the time to commend a good one.

The Ground Rules

You've probably heard a lot about the military's "rules of engagement." These are the guidelines military commanders use in determining when and where to use force.

Reporters have rules of engagement as well. They use phrases with specific meanings. You can structure, and to some extent control, your meetings with reporters by understanding their terms and what they mean. If you don't understand the language reporters use, you can get yourself in big trouble.

Honest reporters will respect the limits you set on their dealings with you if you work with them like professionals and establish the ground rules up front.

Here are the most commonly used "ground rules":

1. *"Off the record"* means that what you say cannot be used or quoted. Most reporters will respect this, but never say anything to a reporter (or anyone else for that matter) that would mean the end of your political career if you read it on the front page of the New York Times tomorrow. If the story's juicy enough, "off the record" could go down the drain.
2. *"On the record"* means anything you say can be quoted and the source revealed.
3. *"On background"* or *"not for attribution"* means the reporter can report what you said but can't report by name who said it.
4. *"On deep background"* means the information you are supplying is only for the edification of the reporter. He is not to use it in a report in any way. It is not attributable, nor quotable.

From time to time, you may think you've been treated unfairly by the media. First, stop and consider calmly whether this is really the case or whether you are simply overreacting. What are the long-term implications of the story? Are the implications possibly less serious than the implications of your challenging—and possibly alienating—members of the press?

If it is clear you've been mistreated, consider these alternatives:

1. *Call the reporter and explain.* See if he'll try to fix the problem.
2. *Write a clear, concise letter to the reporter or news editor.* Outline the inaccuracy in the story and provide a brief account of the correct facts. Avoid keeping a "one-day" story alive by elaborating too much or injecting emotion into your response.
3. *Never demand a retraction.* Instead, simply ask that a correction be made.
4. *If you are responding to an editorial,* request an opportunity to write or broadcast a response.

If it appears that a particular reporter is biased against you, don't call him on the issue the first time. Do what you can to keep track of his errors and request a chance to discuss the matter with the reporter face-to-face. Only after following this route is it appropriate to take the matter up with his editor.

Remember: your effectiveness in dealing with reporters isn't founded upon brilliant defenses against the media. Rather, it's measured by your ability to gain the media's respect, as well as project qualities of honesty and fair-mindedness. Accomplishing these goals can reap great dividends in good coverage.

Developing Media Lists

Before you can run a successful communications program, you must compile up-to-date information about every daily and weekly newspaper, radio station, television station and political blog in your district.

Your list should include:

1. **Daily newspapers**

- a. *Names and addresses of newspapers (morning/evening editions) and circulation*
- b. *Names, business and cell phone, fax numbers and e-mail addresses of:*
 - Political reporters/columnists
 - Assignment editors
 - Editor/editorial staff
 - Weekend assignment editors
 - Specialty reporters (large newspapers often have reporters who are assigned to the environment, business, education, etc.)
 - Photo desk
 - Advertising sales manager
- c. *Deadlines (often 9 p.m. for morning edition, noon for evening edition)*
- d. *Policy on guest editorials, columns, letters-to-the editor. Is there a cut-off date before the election?*
- e. *Policy on photo submissions—will the paper accept photos from your campaign?*
- f. *Editorial policy—do the editors interview and endorse political candidates?*
- g. *Policy for accepting political advertising, cost and size requirements (There's often a cut-off date on comparative advertising before the election.)*

2. **Weekly newspapers**

- a. *Names and addresses of newspapers and circulation (include shopping guides)*
- b. *Names, business and cell phone, fax numbers and e-mail addresses of:*

- Publisher
 - Editor
 - Reporters
 - Advertising sales manager
- c. Deadlines (this information is critical since nearly every weekly has a different deadline for publication)
 - d. Hours of operation (some weeklies don't keep standard hours)
 - e. Policy on guest editorials, columns, letters-to-the editor. Is there a cut-off date before the election?
 - f. Policy on photo submissions—will the paper accept photos from your campaign?
 - g. Editorial policy—do the editors interview and endorse political candidates?
 - h. Policy for accepting political advertising, cost and size requirements (There's often a cut-off date on comparative advertising before the election.)
 - i. Newspaper inserts—will the newspaper distribute tabloids/brochures designed to promote your candidacy?

3. Radio stations

- a. *Call letters, broadcast hours, dial number*
- b. *Names, business and cell phone, fax numbers and e-mail addresses of:*
 - News director (assuming they have a news bureau)
 - Political reporter(ditto)
 - Advertising sales manager
 - Radio actualities
- c. Address (mailing and hand-delivery)
- d. Station format (Top 40, classical, all news, talk, rock, country• western, easy listening, etc.)
- e. Special programming—are there public affairs/talk shows? What's the format, who's the host, and what's the criteria for guest appearances?
- f. Ranking in the market—who listens to the station? Ask for age breakdown, sex, other demographic information (the station may not have this handy and you'll need to look this up online).
- g. Policy for accepting political advertising and cost
- h. Policy for accepting radio actualities

4. Television stations

- a. Channel, network affiliation, time of newscasts (local and national)
- b. Names, business and cell phone, fax numbers and e-mail addresses of:
 - Political reporters

- Assignment editor
 - News director
 - Advertising sales manager
- c. Address (mailing and hand-delivery)
 - d. Special programming—are there Friday evening or Sunday morning public affairs programs? How about other topical programming, such as a farm report, etc.? What's the format, who are the hosts, and what are the criteria for guest appearances?
 - e. Ranking in the market—who watches the station? Ask for age breakdown, sex and other demographic information
 - f. Policy for accepting political advertising and cost

5. Wire services (*Associated Press, United Press International, Thomson-Reuters*)

- a. Names, business and cell phone, fax numbers and e-mail addresses of reporters
- b. Names, numbers and addresses of news editors and bureau chiefs.
- c. List of local papers/stations subscribing to the service

Writing News Releases

News releases provide the foundation in any successful earned media program. However, they become ineffective when overused. When you do issue a news release, make sure it's really news.

What types of events/activities warrant a news release?

Here is a brief listing of potential subjects for news releases:

1. Upcoming events/speeches/rallies, as well as statements after these public appearances
2. News events directly affecting your district and issues of community concern
3. Appointments of advisory committee members, campaign chairmen, county leaders
4. Issue positions (the press won't think it's news unless your position is controversial or stands in stark contrast to a position of your opponent)
5. Deficiencies in opponent's record

6. Endorsements by key politicians, newsmakers and special interest voter groups, such as the National Rifle Association and Chamber of Commerce.

Guidelines for an effective news release system

News releases are no longer sent out on paper, or even Faxed. Almost all communications with the press is via the internet or Twitter. But even though the means of communications has changed, many of the same rules apply.

1. *Use a masthead with your name, logo, address, phone, cell number, website and e-mail address.*
 - a. Don't clutter up your release with lots of useless stuff. Look professional.
 - b. Make sure you check state and local requirements for disclaimers; include them at the bottom.
2. *Check your distribution system every so often to insure that your e-mails are actually going out and being received by reporters.*
 - a. Compile a comprehensive media list (mentioned above) and insure that the right people are getting your releases.
 - b. Follow up with a phone call to let the reporter know you've sent a release.
 - c. If you are sending a news release to multiple addresses, include those addresses in the BCC line so reporters cannot see the other names on your list.
 - d. Know the deadlines of all media. Time your releases accordingly. Mornings are best for releases. Avoid evening releases unless they are tied to a specific event, or are a response to a breaking story.
 - e. Put the copy of the news release in the body of the email. Do not include it as an attachment; many news organizations use spam filters that will not deliver emails with attachments.
3. *Keep it to one page.* If it takes more than one page to say it, you are trying to say too much.

If you must go to a second page, put "more" at the bottom of the first page and use "add 1" instead of "page 2" for numbering the top of the next page.

4. *Make your release easy to read. Use a large font (nothing less than 12-point font).* No one will read a release that looks like a term paper.

5. *PROOFREAD. PROOFREAD. PROOFREAD.* Misspelled words and incorrect grammar are unprofessional.
6. If you're not sure of a word's meaning, *don't use it.*
7. *Type "For immediate release," the day and date in the top, left-hand corner.*
8. *Include the name, e-mail address, home and cell phone number of the contact person in the top, right-hand corner*

Writing an effective news release

1. *The headline is critical to the success of your release.* The headline must capture the essence of the release in the fewest number of words. Headlines should be centered with bold type and all capital letters.

Remember that 90% of your releases won't be read 90% of the time; so a badly written headline kills a release.

2. *Make the "lead" (first) paragraph as strong, concise and informative as possible.* Answer who, what, where, when and why in the first paragraph and limit it to no more than 23 words. The rest of the release, with sentences of no more than 17 words, should supply supporting data and quotes.
3. *Use a "pyramid" writing style.* Put the most important information in the beginning paragraphs, the least important at the end. If your release is used, it will probably be edited by cutting paragraphs from the bottom of the release.
4. *Always use active, not passive tense.* For example, use "Today, Sally Candidate announced her five-point plan to fight crime" rather than "Today, a five-point plan to fight crime was announced by Sally Candidate."
5. *Quote the candidate and identify all quotes.*
6. *Use specific facts and figures to back up your statements.* Avoid generalities and opinions except in quotes.
7. *Double-check all facts and figures.* Make sure you know their source.

The ability to use the written word as a campaign tool is enhanced through experience and hard practice. But there are six general rules that can improve your writing:

1. *Be concise.* Strip away all words that aren't pertinent to your message. However, this doesn't mean to write in a terse, disjointed manner.
2. *Be clear.* Write to express, not impress. If you doubt the clarity of a paragraph, rewrite it. Shorten your sentences. Substitute familiar words for fancy ones. Use concrete examples.
3. *Be correct.* There's no excuse for misspelled words or typographical errors. Have someone proofread everything that leaves your campaign office. Remember, mistakes undermine the credibility of your message.
4. *Be accurate.* If you can't confirm the accuracy of what you write, don't write it. Your credibility is easy to lose and hard to regain.
5. *Be consistent.* Don't shift from a formal tone in one paragraph to a folksy tone in the next. Don't shift between first person and third person point of view. Titles, capitalization and punctuation should be consistent throughout your printed material.
6. *Be conversational.* You want people to understand your message. Campaign writing isn't the same as writing a term paper for graduate school.

Writing news advisories

A news advisory is a short informational release to news outlets advising them of upcoming campaign events. The guidelines are the same as for a news release: your "lead" paragraph should answer who, what, where, when and why. Make sure you use simple, declarative sentences. The only difference is length: News advisories should not exceed two short paragraphs.

Use news advisories to:

1. *Announce details for covering a campaign rally or event.* For example, "News persons wishing to attend the dinner in honor of Sen. Smith must contact the State Party at 555-1212 by 5 p.m., Thursday, May 15 in order to receive the necessary credentials."
2. *Announce a news conference without giving away the substance of the subject to*

be covered. For example, "Sally Candidate will respond to the Governor's State of the State address during a news conference in the Caucus Room of the Capitol immediately following the speech."

3. *Provide technical information about your campaign that the media needs.* For example, "Joe Candidate will be changing offices on Saturday, April 19. The new address will be 231 S. Main St. in Mountain Lakes. The telephone number, effective Monday, April 21, will be 555-1212." See sample release on next page:

BESTGUY for SHERIFF
2345 Super Duper Highway
Gotham, Nebraska 12345

FOR IMMEDIATE RELEASE

CONTACT: Kathy Alrite
512-000-000
Kalrite@bf.com

CANDIDATE FOR SHERIFF OPENS HEADQUARTERS

Your Town, Your State -John Bestguy, candidate for Sheriff of Dawson County, will join campaign supporters at a grand opening celebration of his campaign headquarters, Tuesday, August 4th at 7:00pm. The headquarters is located at 000 East Mason Street two blocks from the Dawson County Courthouse, in downtown Lexington.

According to Bestguy, "This headquarters will be the focal point for my campaign supporters. We plan to wage a major effort to educate the voters of this district as to the issues facing the Dawson County Sheriff's office and the differences between me and my opponent."

Bestguy has taken a stand for making meaningful and measurable reforms in the Dawson County Sheriff's office while redefining the way Nebraskans pay for their local law enforcement. To reach the goal of higher standards within the Dawson County Sheriff's office, Bestguy said he supports placing existing and new dollars into a fund that provides incentives.

The public is invited.

Public Speaking and Presentations

By Deb Sofield, Author of "Speak Without Fear"

According to *Advertising & Marketing News*, "The Book of Lists describes fear of public speaking as the number one phobia in the United States. Yet there is probably no business skill more important than the ability to speak to an audience of any size."

And in politics, there's nothing more important than for a candidate to win an audience with wit, intelligence and a strong understanding of the current issues that will affect their nation, their state or their community.

A standard public speaking mantra is WHAM, which means 'What Here Applies to Me?'

Whenever you speak – your listeners are asking the following questions:

- So what?
- Who cares?
- Should I be listening?
- Why is this important to me?
- And if you're running for office – Why should I vote for you?

Your audience should be able to answer these questions within a few minutes of your opening statement. Why? Because it's in your best interest as a speaker to capture their interest in you and your topic in the beginning of your talk you'll keep them to the end of your talk.

When working on your speech, remember: every voter has values and beliefs and specific issues they care about. And candidates must decide what topics the voters want to listen to and what will motivate and drive them to the polls on Election Day.

Your First Impression

Your presentation begins the moment your audience recognizes you as the speaker.

Studies have shown that people form a first impression of someone new in 7- 24 seconds. Once formed those impressions are hard to change.

It's vitally important that you understand that audiences judge you on the following:

1. Visual --- How you look
2. Vocal --- How you sound
3. Content --- What you say

And these items will make or break whether your audience has confidence in you.

Good speakers must be as careful with their appearance, their voices and their body language as with their words.

To keep your audiences' attention – **you can't be boring** – you and **your topic** must have some sort of **appeal** to your audience.

Realize that **not everyone is a very interesting** speaker, however, if you **love your topic** and are **excited** about sharing the knowledge, you have a **99% chance of keeping** your audience interested – because you're interesting.

Set the Stage for Success

When you accept a speaking engagement, make sure you send a written introduction in advance to the person who will be introducing you. Send just a short paragraph of who you are so the audience will be ready for when you tell them what you'll do for them.

Before you speak (because you/staff arrived early) or during the break before you speak, go through the following checklist:

Set the stage of where you'll be speaking:

- Get rid of coffee cups and water bottles on the head table or lectern
- Remove the notes of the previous speakers from the blackboard or easel
- Cover up the hotel logo on the lectern with your own campaign sign

Here are basic rules of setting up the room for success:

1. *Microphone Etiquette.* Make sure the mic works – always do a sound check. Don't rely upon others – do it yourself.
2. *Room Arrangements.* Think about how to place the chairs, assess the lighting, and cool the room down, if possible. Remember the overall climate of the room can make a big difference in the way a presentation is received.
3. *Lighting.* Ensure that lights are as bright as possible. Remember the audience

wants to see your face; they want to read your eyes; and hear your message. Bright lights create an atmosphere conducive to laughter and interaction. The spotlight is on you.

Preparing Your Talk for Maximum Impact

First and foremost, remember to have a single concept in mind – this is no place for multiple messages. Your audience isn't paying that close of attention so keep your message short, powerful and memorable. Stick to no more than three points.

Pretend you're back in school and craft your speech as if it was an **essay**—it has a **clear beginning, middle and end**. Your talk isn't a legal document; it's a **conversation** between you and 1,000 of your newest friends. So think about:

1. *How do you want to start?* With a joke, a story, a great quote? You need to capture your audience quickly.
2. *How do you want to end?* What great memorable take away line are you going to leave them with? Is your campaign slogan catchy and memorable? Do you want to end with an uplifting quote from a past elected official that you admire? It is your job to leave them wanting more from you.
3. *Speak with Power.* Your voice must convey authority. Avoid the monotonic "put me to sleep" sound – it will kill your presentation. When telling a touching story, soften your voice and slow the pace; when telling a funny story, speak faster and louder and then slow down to laugh with the audience.
4. *Research the Organization* to whom you're speaking. Know who they are; what they've done; and what they're hoping to gain from your association. The person who invited you to speak is the person to whom you need to connect with so you can learn about the needs of the organization and why they've chosen you to address them.
5. *Make Your Talk fit the Audience.* Have an understanding of their needs and how you need to address them. If you're speaking to Veterans, think about what they need to hear from you. Other small business owners, schoolteachers, bankers, lawyers, community leaders, the Chamber of Commerce – it's up to you to know the issues they care about. And you must think through the issues that unite you (and not divide you) and speak to those big ideas.

6. *Keep it Short.* Know that the listener's attention span is short – and getting shorter all the time. Twenty to 30 minutes is a long speech, 15-20 minutes is a medium long speech and seven to ten minutes is an optimal short speech.

Basic Speech Outline: So Your Audience Will Remember You

Your audience remembers best what they hear **first** and **last**.

Opening: be glad to be there!

1. Startling Statement – wake them up!
2. What you plan to accomplish by this talk and in what time period. *i.e. in the next 15 minutes let me....*

Middle Section:

1. Tell your key points about your issues.
2. Try not to have more than three big ideas per speech. More than three is hard to remember.

Closing:

1. Recap of your points and remind them why they matter
2. Close – with why you need their help to win
3. Close – with your final line, quote or story

Putting the Outline into Action

At some point, near the beginning of your talk, thank your host for the opportunity. And then quickly make a statement that is strong enough to sell yourself in the opening lines.

When preparing your speech, ask yourself:

- What is the one main point the audience should remember from the speech?
- What are the three important messages the audience should hear?
- What is the theme of this speech?
- What action should the speech prompt the audience to take?
- How do you want them to feel, think, and act when you leave the stage?

Of course, you know to speak to the audience in conversational terms. Remember they want to hear the real you (the candidate) as a thinking, feeling, loving person, not the candidate as a stiff, boring, and recycled candidate. Your audience wants to feel like they know the person.

As mentioned before: when you write your speech, remember, you're not writing an essay or a perfect piece of written prose that is too stiff for the ear to hear. Remember that a speech operates under different rules – meaning you need to please the ear with your cadence, rhythm and rhyme. Repetition is good most of the time because the audience can't reread a sentence they didn't understand or think about a point for more than a second or two. So, remember your message must be simple, clear, concise, memorable and reinforced.

Using Humor in Your Talk

Bob Orgin, a humorist and student of political humor, says that a joke belongs in a political speech only if it meets three criteria:

1. The joke should be bonding between the speaker and the audience
2. The joke should be relevant to the topic of the speech; and
3. It must obviously be a joke

The bottom line: jokes that are racist and sexist are NOT funny. We live in a 24/7 media where every person is texting and tweeting. Don't let juvenile humor ruin your campaign.

Speaking Engagements Check List

After an invitation to speak has been accepted you or your campaign will need some information from the host of the event to help you best prepare for your presentation:

1. The background of the group: What is their party affiliation? What does this group do? What types of people normally speak to this group?
2. Why did the group invite your candidate to speak? Does this group endorse your candidate, or do they just want to get to know him/her more? Are they interested in a specific issue he/she stands for?
3. Who will the candidate address? Is this an event reserved for officers of this organization? Are all members of this organization invited and is the public allowed to come? Did these people pay for the event? What is the education level of this group and what is their general age range?
4. How long do they want the candidate to speak?

5. How formal is the event? This will dictate what the candidate wears and the formality of the remarks.
6. Was the candidate invited to address the audience on a certain subject?
7. What is the room setup? Will there be a stage or just a clear area? What background will the candidate stand against?
8. Does the organization have someone to handle technology (microphones, sound, any background slide or slideshow)? Will they provide a podium mic, a handheld mic or a wireless lavalier? Will they test the sound system before the candidate arrives (remember to always double check)
9. Do you have a copy of the program schedule beforehand? You and your candidate need to know when to arrive, when they speak, where they should sit, when they can leave, and if they'll have time to mingle in the crowd or if there will be time for questions.

These are just some good things to think about in advance so you can make the most of your time with people who are inclined to be fair to your campaign.

Some Final Thoughts for the Candidate

As a female candidate...

1. Think about accessories to draw attention to your face. Dull finished jewelry – pearls, brushed gold/silver always look nice and don't distract from you or your message.
2. Dress to be a little larger than life. You'll often be photographed as the only woman in the group of men – dress to stand out.
3. You can wear a suit, dress or pantsuit. Remember to always wear a comfortable skirt length in case you're sitting on a stage.
4. Consider good-looking jackets in colors that make you stand out in the sea of navy suits.
5. Never wear a nametag when speaking. Jewelry is bright, elegant stylish, and expensive. A nametag is none of these; it detracts from the authority of a speaker and looks awful in photographs.
6. Limit the amount of perfume you wear – you don't want to be remembered long after you leave the room...

As a male candidate...

1. Make sure your suit fits. Traveling causes some people to gain weight and some people to lose.
2. Traditional colors work best. But make sure your blue suit is the best blue

suit in the room.

3. Avoid ties with strange patterns.
4. Don't wear a nametag while speaking.
5. Depending on the setting some things are left to preference: buttoning your coat button, wearing a sport coat rather than a suit, cufflinks, suspenders, etc.
6. Limit the amount of aftershave or cologne you use – you don't want to be remembered long after you leave the room...

Example Speeches:

#1 Ronald Reagan at the 1992 Republican National Convention had a gentle joke about his own age at the expense of his political foes.

"Over the years, I've addressed this convention as a private citizen, as a governor, as a presidential candidate, as a president, and now, once again as private citizen Ronald Reagan. Tonight is a very special night for me. Of course at my age, every night is a special night. After all, I was born in 1911. Indeed, according to the experts, I have exceeded my life expectancy by quite a few years. Now, this is a source of great annoyance to some, especially those in the Democratic Party."

#2 State Treasurer, Ann W. Richards, Texas, Atlanta, 1988 Democrat National Convention

"I was born during the Depression in a little community just outside Waco, and I grew up listening to Franklin Roosevelt on the radio. Well, it was back then that I came to understand the small truths and the hardships that bind neighbors together. Those were real people with real problems, and they had real dreams about getting out of the Depression.

I can remember summer nights when we'd put down what we called a Baptist pallet and we listened to the grown-ups talk. I can still hear the sound of the dominoes clicking on the marble slab my daddy had found for a tabletop. I can still hear the laughter of the men telling jokes you weren't supposed to hear, talking about how big that old buck deer was and laughing about mama putting Clorox in the well when the frog fell in.

They talked about war and Washington and what this country needed. They talked straight talk. And it came from people who were living their lives as best they could. And that's what we're going to do tonight."

#3 George Bush spoke to the country on September 11, 2001 after terrorist attacks on New York, Washington, DC and Pennsylvania.

"A great people has been moved to defend a great nation. Terrorist attacks can shake the foundations of our biggest building, but they cannot touch the foundation of America. These acts shattered steel, but they cannot dent the steel of American resolve. America was targeted for attack because we're the brightest beacon for freedom and opportunity in the world. And no one will keep that light from shining.... This is a day when all Americans from every walk of life unite in our resolve for justice and peace. America has stood down enemies before, and we will do so this time. None of us will ever forget this day. Yet we go forward to defend freedom and all that is good and just in our world."

#4 General Douglas MacArthur, Duty, Honor, Country

Duty, Honor, Country. Those three hallowed words reverently dictate what you ought to be, what you can be, what you will be. They are your rallying points: to build courage when courage seems to fail; to regain faith when there seems to be little cause for faith; to create hope when hope becomes forlorn.

Unhappily, I possess neither that eloquence of diction, that poetry of imagination, nor that brilliance of metaphor to tell you all what they mean.

But these are some of the things they do. They build your basic character. They mold you for your future roles as the custodians of the nation's defense. They make you strong enough to know when you are weak, and brave enough to face yourself when you are afraid. They teach you to be proud and unbending in honest failure, but humble and gentle in success; not to substitute words for actions, not to seek the path of comfort, but to face the stress and spur of difficulty and challenge; to learn to stand up in the storm but to have compassion on those who fall; to master yourself before you seek to master others; to have a heart that is clean, a goal that is high; to learn to laugh, yet never forget how to weep; to reach into the future yet never neglect the past; to be serious yet never to take yourself too seriously; to be modest so that you will remember the simplicity of true greatness, the open mind of true wisdom, the meekness of true strength. They give you a temper of the will, a quality of the imagination, a vigor of the emotions, a freshness of the deep springs of life, a temperamental predominance of courage over timidity, of an appetite for adventure over love of ease. They create in your heart the sense of wonder, the unfailing hope of what next, and the joy and inspiration of life. They teach you in this way to be an officer and a gentleman."

#5 Representative Susan Molinari spoke at the 1996 Republican National Convention.

"Two hundred years ago, it was the promise of freedom that inspired the first generation of Americans to found a nation. A hundred years ago, another generation bound up the wounds of civil war and opened the west. Thirty years ago, this generation dreamed of

the stars and walked upon the moon.

And like those American who came before us, we have the same opportunity for greatness. Our dreams are just as big.

This November, we will elect the last President of this century and the first of the new millennium. We can change the direction of our country.

It can be a new day for America – an age of dreams as big and bold as any that have come before; and we – every one of us here and every American across this land – we can be the patriots and pioneers, the dreamers and doers. We can restore the American dream.”

Chapter Five

You as the Candidate

Building the Foundations

Too many candidates announce for office without first building a firm foundation. Advance planning is critical. Campaigns are expensive and there are a myriad of laws and regulations to follow. Launching a campaign these days is like launching a new business from scratch. And the most successful businesses have a plan to follow.

You are at the center of your campaign. The better foundation you build—intellectually, financially, emotionally and physically—the more prepared you'll be when you take the plunge and announce your run for office.

Too often, candidates announce for office and haven't thought about the short-term and long-term consequences of their decision. Where's the money coming from? How will I pay the October mortgage? Is my family emotionally prepared? Do I have the energy to spend 18 hours a day on the campaign trail?

Preparing Yourself

To help you better prepare, follow these suggestions:

1. Intellectually

- a) **Continue to improve your public speaking skills.** Sign up for a speech class at a local college or adult education center. Participate in your local toastmasters group. Practice in front of a mirror.
- b) **Beef up your community service activities to gain recognition and experience.** Telling a group of voters that you're a member of the Kiwanis Club tells them nothing about you. Telling a group that, as a member of Kiwanis Club, you headed up a Pancake Breakfast that raised \$5,000 to send needy kids to camp lets voters know you tackle challenges and offer solutions with measurable results.

This is a good time to start getting your name out into the community—send a picture of you and the kids you've helped send to camp to your local newspaper. Send a letter-to-the-editor thanking everyone who attended the Pancake

Breakfast on behalf of your organization. Post about the event on social media.

- c) **Write your “life and times” (autobiography) to gain insight about your accomplishments, goals, and values.** This is the first “homework” assignment I give candidates. Sit down with your resume and flesh out the details—narrative description of your beliefs and accomplishments.

Again, voters want to know more than just resume items. Voters want to know what you have accomplished in life—and what you can do for them.

This is the first step to developing an announcement speech. Your “life and times” also provides information for campaign brochures and focuses your attention on what groups to target in your campaign efforts.

For example, a candidate wrote that he had taught catechism to a handicapped teenager while the candidate was a college student. You can be sure we mentioned his devotion and volunteerism in our targeted mail piece to Catholic voters.

- d) **Increase your network of contacts by identifying and meeting with decision makers, community leaders, political party members and potential contributors.** Keep a database of those with whom you’ve spoken to help you remember who promised to do what on your campaign.

Remember to follow up—too often, people volunteer to help on a campaign and never hear from the candidate or staff. Don’t let that happen to you. Collect as many business cards as you can and append them with personal notes; set up email directories.

- e) **Develop an issue file.** Collect articles about the meetings of the office you’re considering seeking, potential opponents and issues of importance to your community. Remember, voters expect you to know more because you’re a candidate.
- f) **Collect lists now.** Pull together all the membership lists you think you may need to build a coalition, raise money or recruit volunteers for your campaign: church membership directories; service groups (Kiwanis, Jaycees, Lions, etc.); college alumni, and other organizations in which you may be a member or have personal connections, such as the Bar Association, Farm Bureau, Veterans of Foreign Wars, American Legion, Chamber of Commerce, etc.

It’s much easier to spend time collecting the local American Legion membership

list now than trying to find the list to use for a mailing to Veterans just two weeks before the election. Plan ahead.

- g) **Find a mentor to help you learn issues and procedures.** Brush up on parliamentary procedure; know what issues are being presented at this month's City Council meeting. Determine who you can call to help you learn the ropes. Most importantly, attend meetings of the office you are considering seeking before you formally announce. Once you are a candidate, reporters and voters will expect you to know everything about the office.

1. Financially

- a) **Start squirreling away extra money now.** You may believe you can continue to work full-time and campaign for office, but it seldom works out this way. So prepare now.

You are still going to invest in your own money in the campaign whether you plan to or not. There are always tickets to buy for charity events, parking and gasoline bills and meal expenses that are not in the campaign budget—and these come out of your own pocket.

Make sure you have got enough money tucked away to cover your family's expenses. Planning ahead gives your family peace-of mind that you can meet your October mortgage payment.

- b) **Delegate bill paying to someone else.** Whenever I ask a group of potential candidates who pays the bills in their family, nearly every person raises her hand. Delegate that monthly responsibility as soon as you can – there's nothing more embarrassing to a candidate than to have your electricity turned off in October because you haven't had time to pay your bill in six months. Prepare accordingly.

2. Emotionally

- a) **Be patient!** You don't have to order 7,000 neon green and black yard signs today just because the salesperson is at your office. Vendors will be calling and emailing you to try to persuade you to give them your hard-earned campaign dollars. Take time to budget and coordinate. Remember your campaign plan... and use it.
- b) **Remember what is most important—your family.** Schedule time with your spouse and family. An unhappy home life makes an unhappy candidate. And forgetting your daughter's dance recital or your spouse's birthday is inexcusable.

Make sure all- important family dates are marked on the master calendar.

If you think you'll have the opportunity to spend time with your family after you are elected, you won't. You have taken on another job—being an elected official and scheduling personal time is critical.

3. Physically

- a) **Build up your physical endurance by starting an exercise program.** Can you spend an entire Saturday walking door-to-door in a precinct? Can you walk an entire parade route without hyperventilating? If you can't, start building up your endurance now by walking everyday (of course check with your family physician before starting any exercise program). I once had a candidate who escaped to the mall every afternoon instead of walking door-to-door because she was too tired. She lost the election by just more than 100 votes. Don't let that happen to you.

- b) **Update your image gradually so your change won't be so abrupt.** As we discussed earlier, how you look and what you say are important. If you decide you need to make a change in your image, make it gradually. Update your clothing, buy new glasses, change your hairstyle. The trick is to polish your image without people noticing an abrupt change.

Tips for the Spouses of the Candidates

1. *Know the strategy of the campaign, where the campaign is going, the campaign goals and the plans – and establish the role of the spouse early.*
2. *Know why the candidate is running and be specific.* Be prepared with a good answer, and preferably the same as the candidate.
3. Never be overconfident about the campaign.
4. *Talk to people one-on-one.* Good eye contact is a must. Never let your eyes stray from the person you're talking to.
5. Never be hesitant to offer your hand and have a firm hand shake.
6. *Know your limitations.* Be realistic and assess your strengths and weaknesses, be honest about what you feel comfortable doing, i.e., making public speeches, etc.
7. *Be a cheerleader for the volunteers.* Always be kind to the volunteer staff and let them know that the campaign can't be won without their help. Give them the credit and give them something to do that makes them feel useful and important.
8. Mine your personal sources for volunteers: collect lists!
9. *Maintain a good sense of humor.*

10. *Never get defensive.*
11. *Always travel with someone, preferably someone of the same gender or a member of the campaign staff.*
12. *Have a supporter from the area help you with remembering names when attending local functions.*
13. *Understand your spouse's stance on issues, and never try to answer a question when you're unsure of the answer. If you're asked and don't know, tell them you don't know, but that you'll be happy to have the candidate get in touch with them personally.*

Acknowledgements

NFIB would like to thank the following individuals for contributing to this manual:

Nancy Bocskor
President, The Nancy Bocskor Company
nbocskor@gmail.com
www.NancyBocskor.com

Carlyle Gregory, The Carlyle Gregory Company, Campaign Consultant
Douglas Richardson, Direction PR, Media Training
Liz Chadderdon, Chadderdon Lestingi Creative Strategies,
Communications
Mike Hopper, Freedom Partners Chamber of Commerce, Social/Digital
Media
Deb Sofield, Speaker/Author/Coach, Presentations & Speech Coaching
Anthony Bellotti, Resurgence Communications, Digital Media Strategies
Evan Bryan, Douglas-Pine Enterprises, who served as the copy editor.

For more information, please email NFIB Political at political@NFIB.org



NFIB.com
