

Women Winning Campaigns

The National Women's Political Caucus' Hands-on Guide For Today's Leaders

By Cathy Allen



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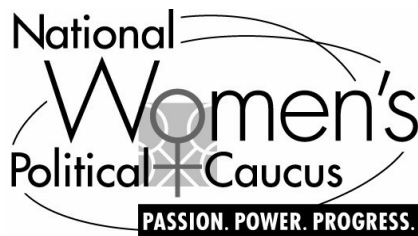
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PREFACE

Welcome to this campaign skills training manual and to the adventure of a lifetime: running for and winning public office and helping others do the same. The National Women's Political Caucus (NWPC) has years of experience in training candidates, their staffs, and volunteers in interactive, interesting, cutting edge campaign strategies, and down-to-earth realistic campaign operations. *Women Winning Campaigns* is NWPC's fourth such manual, updated to include emerging campaign technologies and current practices.

NWPC's goal in 1971 was to increase the number of women in all aspects of political life. Today, we are a multicultural, intergenerational, and multi-issue grassroots organization dedicated to increasing women's participation in the political process, regardless of partisan affiliation, and creating a true women's political power base to achieve equality for all women. With members and chapters in more than 20 states, the Caucus reaches out to women in communities across the country, hosting training seminars and taking action to improve the status of women, with an emphasis on the under-represented.

Through our 501 (c) 3 Leadership Development, Education and Research Fund (LDERF) we prepare women for the task of shaping the future of America. Our research has shown that when women run for office they win as often as men do. What we must do is recruit more of them to run and win.

The Revson Foundation generously provided the funds to make this new manual possible and Cathy Allen, our first author, came back to update and revise it. It is intended for the use of NWPC chapters' training programs, now available on line and in digital format for printing locally. Copyright permission for other women's nonprofit, nonpartisan training groups can be obtained by contacting NWPC's headquarters in Washington, D.C. (see below). We welcome their contribution toward promoting women's leadership.

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INTRODUCTION

This campaign manual was written with you in mind. Yes, you who have taken a look around and realized that you could make a difference. You who are raising the children, keeping up the home, and being a good partner to your spouse. You who are volunteering time to community causes, neighborhood watch, and every good organization which asks for your time and money.

Yes, this book is for you. We need you. We need you to look again at political office, look at running yourself. It is towards this goal, we hope you look over this manual.

It was written, and updated, to give all women in all of our chapters of the National Women's Political Caucus one consistent foundation of what we have learned in electing thousands of women in their first elective campaigns. This manual allows you to learn from the best and the brightest, as well as work with those who learned the hard way that all politics is local.

Twenty years ago when we wrote the first comprehensive manual for women candidates, less than 17 percent of the total elected officials were women. Today, more than 26 percent of the elected officials are women--and we grow stronger with each Election Day. Thousands of women, from Janet Napolitano, the Governor of Arizona to Patty Murray, the U.S. Senator from Washington, credit NWPC trainings as among the best first steps they took towards political success.

Much has changed in twenty years of politicking, but the most dramatic change has been the technology we use to campaign. Where we had shoe boxes filled with index cards to organize our volunteers, today we have computers. Where we left phone messages to get in touch with consultants and the media, today we have the Internet and emails. Where we sent out letters with remittance envelopes to receive most of our low donor checks, today we have credit cards and give online. Where we would spend hours in editing booths to change a TV spot, media experts now can edit from their personal computers from miles away in minutes. And campaign Web sites are as mandatory as yard signs.

Other changes have resulted in new campaigning strategies. Volunteers are harder to find and keep (the majority of volunteers twenty years ago were women, and now many of those "volunteers" have gone to work and have less time to give to campaigns). The "press" is now "media" and even though the print media coverage of politics has been reduced, there are Blogs and special email blasts that have their own audiences.

Although many things have changed, it's amazing how much has stayed the same. Still the best advice for running a campaign is our Golden Rule: **You need the right message going to the right target at the right time, many times in a variety of ways.**

The National Women's Political Caucus is especially known for training women who are about to take the first step to public office: the women who run for water boards, school boards, city councils, state legislatures, and statewide offices. Today our trainers have been asked to help in other countries--like Morocco, Jordan and Yemen--where women are just now getting the right to vote or the right to run for office. In addition, other groups have turned to the NWPC for help in training their members on numerous subjects pertinent to campaigns and elections, as well as women's leadership potential.

Campaigns are highly unpredictable. To the extent that we can help prepare you for the tough times, prepare you for the surprises and disappointments, and bolster you up until you get to the good times, we will have accomplished our mission. This book may outline tactics, targets, and technologies that are new to you. Keep an open mind, and decide what is good for you.

The cumulative talent we have collected is for one goal: to get you on the road to running and winning. Refer to this guide often. More than anything, please enjoy this book and take it to heart ... as well as to the polls.

We need you. America needs you. Please give it a chance to rouse you into action you might have been rationalizing against for years.

Enjoy.

Cathy Allen, author

Former Vice-President, Education & Training
National Women's Political Caucus

ACKNOWLEDGEMENTS

It took many people and many new ideas to help put together this revised edition of the National Women's Political Caucus campaign manual, and even the mission to us from those who funded it (The Revson Foundation) takes into consideration women in the world of today's politics.

The Charles H. Revson Foundation, through its Board and President Lisa Goldberg, offered the funding to update and revise the current incarnation of the manual Revson originally funded in 1990. It was before the "year of the woman" in 1992 that Revson teamed with the NWPC to offer one of the most comprehensive recruiting and training programs for women candidates throughout America.

Now, some fifteen years later, the book has held up its part of the bargain by being an inexpensive catalyst and consultant in helping women run for office--especially those running for the first time. A new aspect of this manual is that it will be made available to other appropriate women's organizations which are endeavoring to encourage, recruit and support women running for office.

The chief organizer was NWPC Vice-President for Education and Training, Marguerite Cooper. Her dedication, editing, incisive questions and important tips from her experience in the California campaign world, made this book happen on time, within budget, and with more technology information than we first imagined would be included here. Gail Garbrandt, one of the NWPC lead political trainers and a professor at the University of Akron (Ohio), also edited the entire book and put us in touch with one of the rising stars of the computer world (Andrew Franks) who helped us with the technology chapter.

In addition, Kathleen Schafer, a political consultant from Washington, D.C. and instructor at George Washington University helped edit, rewrite and add important elements to our Image chapter. Elected women officials Kathy Keolker Wheeler, Jean Godden and Sue Hammell helped in our positioning of ethical considerations in the Negatives chapter. And, Linda Mitchell upped the ante on how we train women on fundraising.

My own staff dropped everything for about two months to get this manual completed in time for the 2005 NWPC Biennial Convention, and I am entirely indebted to them for polishing up the 250 pages that follow this opening. Bonnie Beukema and Roberto Gara helped with several chapters; Jean Shefveland did the heavy-lifting on our grammatical editing; Stanley Tsao did the formatting; Linda Kelly made sure other work stayed off my desk so I could get the new writing done; and Eleanor Bianca ("EB") Licata, my chief editor and task-master, made sure the book got done.

And finally, women all over the world will reap the benefits of our collective work thanks to the support of NWPC President Llenda Jackson-Leslie and the Caucus' External Affairs Director Tressa Feher.

Cathy Allen

Chapter 1

Running as a Woman

To many of us, it seems as if we have been working forever to increase the number of women elected to public office. Since 1971, the Center for American Women in Politics at Rutgers University has been cataloging the number of women elected to office. Their work has been a gift to the American woman's political movement. It is always easier to progress when you are aware of the trends of what is working and why.

In the early years, not so long ago, we could count women elected officials on one hand in practically every state. Women in Congress mostly succeeded their spouses. Women in statewide office were limited to Education Superintendents or Health and Social Service posts.

In 1971, only eight women sought their party's nomination for the U.S. Congress. This last year, more than one hundred women sought that nomination. In 1971, we had no women governors; today, eight women are governors.

Much has happened; much has stayed the same. The truth is we have moved slow and sure, increasing our numbers and steadily breaking new boundaries: a new state senate president here, a police commissioner there, and more legislation that helps level the playing field for women.

In 2005, eighty women serve in the U.S. Congress--that's up from the seventy-four we held a decade ago--but not by much. Fourteen women serve in the Senate, and sixty-six women serve in the House. The number of women in statewide elective executive posts is eighty-one, while the proportion of women in state legislatures is at 22.5 percent. Specifically:

Congress: women hold eighty, or fifteen percent, of the 535 seats in the 109th US Congress--fourteen, or fourteen percent, of the one-hundred seats in the Senate, and sixty-six, or 15.2 percent, of the 435 seats in the House of Representatives. In addition, three women serve as Delegates to the House from Guam, the Virgin Islands, and Washington, DC.

Statewide Elective Executive: In 2005, eighty-one women hold statewide elective executive offices across the country; women hold 25.7 percent of the 315 available positions. Among these women, thirty-five are Democrats, forty-three are Republicans, and three were elected in nonpartisan races.

State Legislature: In 2005, 1,663, or 22.5 percent, of the 7,382 state legislators in the United States are women. Women hold 399, or 20.2 percent, of the 1,984 state senate seats and 1,264, or 23.4 percent, of the 5,411 state house seats. Since 1971, the number of women serving in state legislatures has increased more than four-fold.

The ten states with the highest percentages of women state legislators are:

State	%Women	State	%Women
Maryland	34.0	Washington	33.3
Delaware	33.9	Colorado	33.0
Arizona	33.3	Kansas	32.7
Nevada	33.3	New Mexico	31.3
Vermont	33.3	California	30.8

(Center for American Women and Politics, "Women in Elected Office 2005 Fact Sheet Summaries," *Facts and Findings*, May 11, 2005, <http://www.cawp.rutgers.edu/Facts/Officeholders/cawpfs.html>)

Why Aren't More Women Running?

Women are still raising the families, running the school PTA's, and keeping up the house--and working a fulltime job or two. In addition, women are working outside the home more than ever. Women are even deciding in greater numbers to be more involved, to lead, and to compete for posts where few women served previously.

However, although more women are leading, they are not choosing politics as their primary career. The need for more women in the political pipeline has become painfully clear; we need women acquiring the experience and name recognition to move up.

The rate of progress has slowed, and in fact in some states, women are even backsliding in numbers. In 1971, we had 4.5 percent women elected to state legislatures; in 1981 we increased to 12.1 percent; in 1991, we jumped to 18.3 percent; in 2000 we were at 22.5 percent and now here we are in 2005, and we're still at 22.5 percent.

The pace has slowed for many reasons. When the National Women's Political Caucus (NWPC) began major country-wide training programs in the early 1990's, women would tell us they weren't running for office because:

- They felt they weren't qualified or they felt they lacked executive experience.
- They didn't think they could raise the money;
- They felt the timing wasn't right: children were too young, not enough planning, etc.;
- They were told by the political parties that it wasn't their turn;
- And, they didn't think they could win.

But we persevered: women ran--including a record number after the 1990 reapportionment that left many seats open, and many women with opportunities to run for an open seat. We took a big step in 1992, "the year of the woman", fueled by women's outrage at the Clarence Thomas' confirmation hearings and the testimony of Anita Hill. Our first invigorated class of women elected to office made history. Other reforms, including term limits, also affected women's participation in campaigns and elections. Campaign finance reform, especially limiting the amount of money that can be donated to a candidate, and term limits were touted as important to helping more women run for office. However, neither has been a catalyst in helping entice more women to run. In California, term limits have resulted in fewer women in the state legislature as good and powerful women are termed out and not being replaced by women.

However, in the last decade, many women have run and won. Women have determined they are as qualified to run as men. They know they can raise the money, and fueled by organizations such as Democrat's Emily's List and the Republican's Wish List, they have other women friends who will help them. Political parties are helping women, and even recruiting them for office. There are now many more organizations devoted to helping women get elected and appointed to office; for example, Future PAC for African American and women and HOPE-PAC for Latinas. Both parties are actively recruiting women to run, though both are under intense pressure to find women who can beat moderate opponents, thus forsaking moderate women for more extreme philosophies.

Women know they can win, but now they are plagued by other misgivings.

They can't afford to run as they need to be an economic contributor to their family's income;

They haven't got the time as they balance a job, a family, a household, and other community involvements;

They look at politics as all-consuming, too exposing, overly invasive to families, and too depressing with budget cuts being the dominant policy work in front of legislators;

They would rather give back to the community in a different way that allows them a higher personal quality of life.

We face different challenges in this new millennium. For the first time in the history of the world, the international average of women elected in democratic countries and emerging democracies is now higher than that of the United States. That number: 15.7 percent; our U.S. average: 14.5 percent. (Inter-Parliamentary Union, "Women in National Parliaments," February 28, 2005, < <http://www.ipu.org/wmn-e/world.htm>>)

Women need to be re-inspired to run for office: we need them. Women in greater elected numbers make a difference for all of us. Although their reasons for running are different: women's impact is unquestionably favorable. We make an immediate influence when it comes to education and literacy. We change the debate from corporate profits to the impact proposed laws will make on families. We demand changes in health care, social services and the environment. We care about budgets, and the impact they have on all of us.

Why Should Women Run?

There's more than just being a woman that attracts people to women candidates. Voters, especially disenfranchised voters, new registrants, and people who haven't voted in years, want women as they represent a refreshing change from what they see in public office today. The public seems to be asking for more substance, not just style. They want leadership that is tied to values. They want values tied to specific goals and objectives. They want integrity, character, accountability, responsibility, and creativity in finding solutions.

These are women and men, and they are looking for a change.

One of the foremost women theorists on women's ways of leading, Dr. Beverly A. Forbes, who is an author, a professor, and a consultant, outlined an extraordinary list of reasons why women's leadership styles might be far more attractive to American voters than traditional male leadership dynamics. They want:

Leaders whose morality includes ethics, care, compassion, responsibility for others, justice, interdependence, and honesty;

Leaders who see the connections and patterns among the biggest problems of our day. People who see the relationship between issues--between the lack of meaning in our society and the lack of opportunity for minorities and women;

Leaders who strive for cooperation over competition: people are looking for less battles and more collaborative work among their elected officials. People want win/win resolutions not win/lose scenarios;

Leaders who tackle tough issues: the general public doesn't like playing games with people's lives: the posturing, the turf battles, the protecting of egos, and the self-serving platitudes;

Leaders who can work with people to get the job done and, at the same time, bring out the best in others. Women reflect those democratic leadership styles;

Leaders who listen--and not just to those who are like them but to different voices, people on the margins, the women, people of color, the gay community, and the physically-challenged community;

Leaders who are empathetic--who know what it is like to be without power, to be the victims of the system, to be the minority. Women's interpersonal skills are more practiced and more developed;

Leaders who don't separate the personal from the professional -- who know the importance of integrating your work, family, values, politics, community commitments, and leadership;

Leaders who are not tied to the status quo--those who are not caught up in the hierarchy structure are those most able to stand up against it to change its course;

Leaders who share power and are willing to empower others--those who use power that comes from respect in working with people as opposed to those who assume authority by merit of their positions.

Women live with the ambition that they can influence others to take on problems and help find solutions. They like to work with people. They find the “go it alone” practice of resolving a problem far less satisfying than empowering others to resolve the problems with them. This does not mean that women should not take credit for their victories, or for the resolution of their constituents’ problems. Rather, we acknowledge that they are more willing to take pride in solving a problem *with* people than solving a problem *for* people.

For The Record: Women Do Make A Difference

Legislation introduced by women has made a substantial difference in everyone’s lives.

Representative Patsy T. Mink (D-Hawaii), one of the most outspoken advocates for women and equality in education, sponsored the 1972 Title IX law banning gender discrimination in federally funded educational programs. Mink said her interest in gender equity legislation stemmed from being rejected for admission to 12 medical schools in 1948 because she was a woman. Title IX has dramatically increased the number of women in traditionally male educational programs. In 1970, two years before its passage, women earned only 8.4 percent of medical degrees. That percentage increased to 23.4 percent in 1990 and 41.0 percent in 1997. It has also dramatically increased the number of women in athletics, an 811 percent increase for females in college and a 347 percent increase for females in high school.

Senator Mary Landrieu (D-LA) mandated \$25 million of the tsunami relief funds for initiatives that focus on the immediate and long-term needs of children, including the registration of unaccompanied children, the reunification of children with their families, the promotion of adoption of orphaned children, the protection of women and children from violence and exploitation, and activities designed to prevent the capture of children by armed forces.

Law and Order has traditionally been thought of as a “man’s issue”--to protect women and children from the danger of outside forces. The women in the 103rd Congress made a case that women face a common threat that traditional policing has failed to address adequately--the threat of violence from within. It is estimated that there are 1.8 to 3.3 million cases of intra-spousal violence annually. Representative **Pat Schroeder (D-CO)**, as a member of the U.S. House Judiciary Committee, shepherded legislation (VAWA--Violence Against Women) into the Omnibus Crime Bill and moved the proposed bill out of committee and onto the floor to passage.

The Women’s Health Equity Act contained 32 provisions addressing deficiencies in the treatment of women’s health research, services and prevention efforts. It was spurred by **Representatives Pat Schroeder and Olympia Snowe (R-ME)**, (both co-chairs of the Congressional Caucus for Women’s Issues) who discovered that the National Institute of Health conducted federally funded research exclusively on men! WHEA mandates the inclusion of women in such research as well as increasing funding for research on breast, ovarian, and uterine cancer.

Representative **Florence Price Dwyer** sponsored successful federal equal pay legislation. Dwyer was instrumental in the passage of such legislation both in New Jersey and in Congress. There was a long list of women's organizations supporting the legislation. The purpose of this bill according to Dwyer is, “to enact a workable and effective law that will protect women employees from wage discrimination.” In 1963 the Equal Pay Act passes providing equal pay for women for equal work.

Senator Barbara Boxer (D-CA) introduced federal legislation that would require pharmacies to fill all prescriptions, including those for contraceptives, or refer customers to another pharmacy that will fill the prescription in question. The legislation was necessary as several pharmacists had argued religious or ethical beliefs, prompting them not to fill the prescriptions.

State Senator Karen Fraser from Olympia, Washington thought it was wrong that women breast-feeding in public could be cited for indecent exposure. She sponsored legislation to take it off the books.

In state legislatures, women frequently take the lead in the following areas of reform legislation:

- School safety and anti-bullying
- Small business loans for women-owned businesses
- Gun control
- Campaign finance reform
- Anti-discrimination, including gay rights
- Pay equity
- Literacy programs
- Child care standards and funding
- Home health care availability and regulation
- Ethics and disclosure regulation

Although women are joined by many of their male counterparts as co-sponsors on this legislation, they traditionally take the initiative, track the legislation, and build bridges across party lines to support legislation that affects all of us.

Just as interesting is the effect that more women have on the process. The days of women being joked about are long over; in fact, elected men who dismiss women in office do so at their own peril.

Target Women And Shore Up Your Base

If you were an Italian in a district with a majority of Italian voters, or a farmer in a district that was heavily rural and agricultural, you wouldn't ignore your "natural" base and go looking for votes elsewhere. Neither should a female candidate ignore her "natural" base among women.

Too many campaigns worry excessively about the chance that they might offend some voters. A better approach for a woman's campaign is to identify votes they can WIN, and then go out and positively and aggressively court them. On Election Day you win by having the most votes, not the least amount of dissatisfaction among some voter groups. An approach that seeks merely to avoid antagonizing voters will end in defeat more often than not. Unless given a compelling reason to be FOR a candidate, voters will choose the candidate with whom they are most comfortable, and in all likelihood, this WON'T be the woman.

Why? Like it or not, since women candidates are fairly new, they start with a higher burden of proof. Like a Democrat running in a largely Republican district, women have to work harder to convince the voters to support them. Do not hesitate to take some strong positions to win votes from particular voters who should comprise your natural constituencies for fear that others may be alienated. You only need 50 percent plus one to win. You don't need it to be unanimous!

Don't Worry About Offending Men

Does being in favor of increased aid for mass transit mean you are opposed to every one who drives a car? Of course, not. With some tact and common sense in choosing and articulating your issues, there is little reason to fear "male backlash" when pursuing votes from women. Here are some reasons why:

- You don't start with every male vote anyway.
- "Women's issues" have become identified by many women and men as mainstream issues good for all of us. In several states, men have gone out of their way to sponsor family, children and women's bills--especially younger male elected officials.
- If being "tough" personally is your style, it does not have to be a detriment. Consider U.S. Senator Barbara Mikulski of Maryland. People called her tough, but as one of the first women elected in her own right (not taking the seat of a spouse who vacated the office), being tough was important. She had to prove that she could stand up to the good old boys.

- For those who still may not be convinced and are looking for a little insurance, try this: pick an issue specifically associated with men, preferably a high visibility one that they can agree with, and take a strong view. Give a good chunk of the male population a reason to say “Hey, she’s alright.” She agrees with me on (issue X).

Dianne Feinstein used this approach in her campaign for the Democratic nomination for governor of California. She ran an ad that was strong and dramatic in both tone and content that included her record of hiring more police to fight crime and her support for the death penalty. The result: among men, Feinstein’s support increased 14 points while her opponent dropped 25 points!

Find Issues To Activate “The Gender Gap”

The gender gap is defined as the difference between the proportion of women and the proportion of men voting for the winning candidate. Some political pundits argue that a gender gap no longer exists, if it ever did. Don’t believe it! If there is not a gender difference in every race it doesn’t mean that a gender gap doesn’t exist in any race. It is real. It is there. It is different at different levels of office. And you need to look seriously at ways you can enhance the gender gap in your campaign.

At the national level, war and peace or the environment may drive the gender gap. At the state level it could be education, reproductive freedom, or wages. At the local level it could be drugs, day care availability, teen-age pregnancy, citing a hazardous waste plant, or something else entirely. Find out what if anything motivates women to vote in patterns different than men at your level and develop strategies to put that voting “gap” to work for you.

It may not be necessary to find new issues to make the gender gap work on your behalf. All that may be required is to look at issues that are already out there, from a new perspective with greater appeal, a compelling connection, or a fresh perspective targeted to women.

Take drugs as one example. Don’t limit your position to just tougher penalties. Add a serious treatment provision to your position. Present specific ideas for prevention efforts in the community. Or “localize” it by developing an enforcement mechanism unique to the office you are seeking and relevant to the problems in your community.

Consider a “real life” example related to the environment and families--both issues that rank high in gender gap discussions. Congresswoman Jolene Unsoeld of Washington State, a strong environmentalist, took her basic environmental themes and effectively linked them to family concerns that targeted women voters. She emphasized that the children and families in the district deserved to live in an area with clean air, clean water, and a clean, healthy environment. This message played well with women voters and built her support in that voting group in a state that is environmentally conscious.

Why Women? Why Not You?

Leadership characteristics generally associated with women have slowly been moving into the mainstream for an entire generation, in part because our society has been demanding more answers from their political candidates. The culture is changing; it’s more in touch with values and ethics, style and inclusiveness, listening, and empowerment.

And waiting in the wings are women. Intuitively, women know they belong to a new generation of leaders--leaders who have what it takes to lead with compassion and conviction.

If you are not able to run, then who should you be encouraging to run? Every woman has a vested interest in finding and supporting good women to take our rightful seats in every level of political office.

Chapter 2

Should You Run?

Deciding to run for office or even getting involved in a campaign can be a scary proposition, particularly the first time. The venture, while filled with excitement, scores of wonderful people, and the promise of making the world a better place, is also filled with unknowns and no guarantees that you will succeed. In fact, winning or losing can have a great impact on your personal finances, your family's mental health, and your own self-esteem.

It's hard not to think you are inferior if you lose. You offer yourself as a testimonial to change, to betterment, to solving problems, to changing the status quo, and to making a difference for children.

Yet, when the votes are in, you win and are happy--or you lose and are devastated--at least for awhile. It's little consolation to note that four times as many people lose than win every election cycle.

Women especially tend to dwell on the negatives of losing as opposed to the possible positives of winning when first deciding whether or not to run. We are not, by our gender tradition, risk-prone people. We do better as candidates, however, than our male counterparts who are more risk-prone in taking chances like running for office.

Where Do You Start And How Do You Decide?

Women are good candidates for today! The American population--as well as internationally emerging democracies like Morocco and Jordan--has come to expect well-qualified women to be on the ballot.

That's the good news. The not-so-good news is that women traditionally take much longer to decide to run than men. For women, all the test signs have to be perfect. We tend to take a great deal of time for the decision-making process: years instead of months before deciding to run. We also tend to believe we must have our lives in perfect order before we declare: the ideal campaign manager, the best finance team, perfect timing within the context of our own families and careers, and our appearance has to be better than when we graduated from high school. The list continues....

This dilemma of whether to run or wait is one of the most important decisions you will make in your life. How and when to make that decision needs to be orchestrated as carefully as the campaign itself.

No personal, professional, or financial reason will be more important than the timing and the race you choose. With more than 90 percent of the incumbents in this country getting reelected each year, the most essential criteria for making your decision should be the availability of an open seat or a particularly vulnerable incumbent seeking reelection.

Making The Big Decision

When do you start and how do you decide? Let's talk about a perfect timing situation and backdate your schedule one year prior to the November general election date. Remember, in politics more than virtually any other profession, "timing" plays a crucial role.

Every other year in this country, there are over 1,500 major races costing more than \$50,000 each. From city councils to state legislatures and from U.S. Congressional seats to special elections, every year is a banner year for politicians. In most cases, would-be political hopefuls already have a specific office in mind. Very few people decide to run and then determine the office for which they will run. Nonetheless, a thorough review of all elective offices in the political jurisdiction should be considered before making the decision to seek a particular office.

How do you decide to run? A good self-analysis is essential. You must ask and answer some tough questions. Then take the same questions to a trusted friend, a carefully selected reporter, and people who will be candid about your situation.

Get a “reality check” on your prospects and keep your ears open. One of the most difficult messages to hear is that you are not ready to run for office, particularly when you want and expect to hear the best.

What Is Your Motivation For Running?

Why do you want to run for office? What do you offer that is deserving of respect? What do you want to do to improve the quality of life for your prospective constituents? What issues do you feel strongly about? Can you convey that to others?

Political pundits will all give you the same advice: you have to have a passion for running and winning. You must want a particular office so badly that you are willing to accept the dramatic changes it will create in your life. The commitment has to come from deep within, and to get elected, you will have to accept and do things you may not enjoy.

Does The Public Know Who You Are?

Before deciding to run, you need to look long and hard at the community from which you intend to garner your support and ultimately your votes. Do you draw your supporters from a close-knit group of friends or do you enjoy support from a good cross-section of the constituency? Do the influential people know who you are and consider you one of them? What does the local media have on file about you? Have you gotten much press?

In the political world, name recognition determines how hard you will have to work. Appointed offices often give an aspiring candidate a chance to deal with the public in policy-making positions and an opportunity to build name recognition. How many people recognize your name and how fondly do they recall what you did? A person who gains name recognition based upon a negative experience is building the kind of familiarity that will not translate into votes. The type of name recognition that translates into victory is built by running for office, receiving press attention, speaking at events, joining organizations, and serving on boards and commissions.

In analyzing your name recognition factor, be honest with yourself. For example, being a member of an organization but not being active is not a good indication of your commitment. Speaking at public events for years, yet never receiving any press attention is not going to help your name recognition. Politically speaking, if you don't get credit for helping a cause, you may as well not get involved. There are many good reasons to work a cause or issue but if you have political aspirations, follow up your commitment with press coverage.

One of the best ways to build a constituency and name recognition is to care passionately about an issue and translate that concern into a positive, public solution. Bringing public attention to a problem, making public officials address that problem, offering needed solutions, and getting them to acknowledge the solution could solve an important community dilemma; at the same time it could bring you to the forefront of the public eye.

Translating Activism Into Leadership

What is your early name recognition? If you have championed causes, held appointed office on a board or a commission, led a neighborhood lobby or worked on a charity event, then you have met a number of people in your community. What do those people think of you? Make an effort to look back at your past associations and use those contacts. Here are a few clues to determine the public perception of your leadership skills:

- **You get good press** when you get involved in an issue or make a presentation.
- The entire room stops to listen when you speak.

- **You can rally a group of people** to help you with a cause just by calling them to action.
- **You are asked to serve on community task forces** that develop plans, analyze problems, or initiate projects.
- **Community leaders go out of their way** to talk to you when they see you in a public setting.
- **People generally appreciate your solutions** to problems and let you know they appreciate your opinions.

Leadership has no singular definition. It takes different forms depending on the community, the situation and the individual involved. How you have come across with your message may indicate your chances of being recognized as a leader strong enough to attract the needed voter support.

Are You Ready for All the Attention?

Can you face a crowd and convey your convictions? How well do you hold up under television lights? Do you have a sense of humor? Can you handle eighteen matters at once? How well do you perform with little sleep? Are you good with people? Can you delegate authority? Can you attract and maintain a strong team? Do you know how to handle criticism without taking it personally?

Temperaments are put to the test in any campaign. Those with the best survival rates are usually those with a good sense of humor, high self-esteem and a base of friends and supporters who will help them through the rough and tough times.

Not everyone is born to lead, especially when you consider the public scrutiny associated with candidacy and holding office. Some women feel more secure than others speaking before a crowd, asking for money and support, talking to the press, or living the “fish bowl” existence of a candidate or elected official under constant observation and scrutiny.

Here are some critical questions to consider before deciding to run:

- How do you respond to rejection or compliments?
- How well do you handle self-promotion?
- How do you respond to sharing your personal life with the public?

Being a candidate is perhaps not the best time to “find yourself.” Political candidacy is ideal for a fairly confident, centered person who knows her own strengths and weakness and is the right person, running for the right position at the right time.

The Role Of Being A Candidate

Understanding your role as a candidate is imperative to the success of your campaign. There is not enough time for you to be both a candidate and your own campaign manager. Don’t fall into the trap of feeling that because you know how to run a campaign you can assume both roles. Now is the time for you to rely upon others to take the details that you have prided yourself on handling effectively in the past. As a candidate, you cannot afford to spend time on the jobs of the campaign manager, scheduler, or office manager. Find reliable people, delegate these tasks, and let the details go; being a candidate will be tough enough.

Secrets And Lies

Do you have any secrets that can be magnified to hurt your chances such as drunken driving, tax evasion, smoking marijuana/using drugs, a messy divorce, or being fired from a job for “questionable” reasons? Have you ever exaggerated, lied, or cheated about your performance in school, jobs, or organizations? The list goes on, although you will probably pass “the test.”

Remember, your life and your family’s life will soon become an open book ... your lifestyle, your background, your past, your family members, and your finances. It is the price of becoming a public servant and community leader.

No one is perfect. Everyone has traits that detract from the positive image they wish to present. Everyone has stumbled, consciously or unconsciously, into circumstances they would rather not have in their list of experiences. Be aware that there are some problems the public will have a hard time forgiving that may affect your public presence. Untreated drug addictions, whether illegal substances or alcohol, will not be tolerated by the voters and will surely be exposed by the press. An indiscreet relationship years ago, a husband's income taxes, or a family member's problems could also find their way into print. Because women are generally perceived to be more honest, the public is more jolted when a woman gets caught in a lie. No one thing will eliminate you as a candidate; it's how you handle this type of issue that may impact the voters' response. Just be prepared for the worst case scenario and determine early in the campaign what your response to these situations will be should they arise.

Your Resume

It is imperative that resumes, background summaries, and brochures accurately represent your past. Is your resume strong enough to reflect experience, stability, and knowledge? Although politics is a profession that is prone to hyperbole and exaggeration, be careful to avoid this when writing about your past. Reporters love to search for inconsistencies in a candidate's written profile. Having discrepancies in your resume featured on the front page of the local newspaper may easily destroy your chances of ever holding elected office. The public may be hard-pressed to believe other ideas about you if you lied about something so basic as your own experience and background.

Family And Career

Although it's you who will be in the limelight and on the ballot, your family is close behind. Your busy schedule will certainly impose on your time together. Attending an endorsement meeting instead of the school play is not easy for an 8-year-old to accept.

The popularity, press, and attention you receive will spill over to your family. How your family handles their stress will likely have a strong influence on how you handle your own stress.

Talk it through with the family. Let each member discuss it alone with you and then with the entire family. Have another elected official over for dinner and let the family ask questions about how her family life changed because of the campaign. Be sure to talk about the good that comes with being a change-maker in the community.

Be realistic about the changes that will take place in the household: from increasing the domestic burdens everyone will have to help shoulder to living long periods of time without Mom at home. The final decision must be yours, but remember, a family that fully participates in your decision to campaign is apt to become one of your greatest assets.

And finally, what about your career? Will your business allow you a leave? Can your work schedule be tailored to suit the campaign? If you lose, will you have a job to return to with your current employer? If you lose, you may find the transition back to a "mundane" job difficult. The contacts and reputation you have built during the campaign can help launch you into a new career. But don't count on it. Burning career bridges, upsetting or leaving a bad impression on any of your contacts is a bad idea for any candidate. It is important to protect yourself and look beyond the election.

Your Physical And Emotional Stamina

Can you go fifteen hours a day in the public eye and sleep six hours a night without showing the wear and tear on your personality? Can you keep up a neat, attractive appearance? Are you physically healthy enough to run? How well do you hold up to criticism and piercing press inquiries? How do you handle setbacks?

Running for office is like starting the most disciplined of diets. You'll have many new restrictions that you must approach realistically. Remember, no one you have ever met or even read about in elective office is physically or emotionally perfect. But it may help to get physical

exams taken care of before you file for office. If you smoke, refrain from doing it in public or consider quitting. Alcohol consumption needs to drop dramatically. You don't need the empty calories, the drain on your energy, or the reputation.. Keeping fit and taking good care of yourself will build your self-esteem.

The stress of being under constant scrutiny can take its toll on the hardiest of souls. How you handle the increase of people, speaking engagements, and eager volunteers will determine how well you survive the election process. The most important time of the campaign may be the time you spend alone. Just because the schedule reflects a long list of events and public appearances where you have to be "on" doesn't mean you can't plan some quiet time. Give yourself enough time to look and feel your best. Learn what you can do to maximize the time you are awake. Likewise, try and leave the all-too-short time allotted for sleeping for that purpose alone. Do not take your problems to bed. Lack of sleep will be a bigger problem than any anxiety or worry that could keep you awake.

Knowing Your District

Getting a "snap shot" of the district's people is crucial, but it's also good to know the physical setting of your electorate. Get in a car or small plane and see the whole area. Drive the boundaries. Know the big plants and small parks. Know all the natural landmarks and visit each neighborhood. View the libraries and learn all the local publications/newspapers. Count the schools and playgrounds. Drive the roads of the area so you can speak about your district from recent, direct experience.

Assessing the power structure is not as easy as driving the district or reading any polling information. Who are the community leaders? Go talk with them. Listen to them. Attend the Chamber of Commerce luncheons, Rotary meetings, local Women's Political Caucus events, and the environmental groups' banquets. Schedule meetings with union, minority, parents, business, recreation, and other special interest leaders. Ask about **their** goals for the community ...and ask for their help. One of the most frequent reasons newcomers get support from the power structure is that they ask for help first. One important reason to announce early is to be the first to ask for a person, group, or organization's support.

If your county's political party (Democrat, Republican, or other) has an active county organization, seek out its leadership and let these people know your intentions. If you are seeking partisan office, it is strongly advised that you get involved in the party prior to becoming a candidate. The local party can be one of your best sources of help, volunteers, and information.

The Opposition: An Open Seat Or An Incumbent?

An open seat means no one is currently holding the position and every candidate has a chance at running and winning. Running against an incumbent means there's someone already elected that you will have to run against and remove from office before assuming the position. The incumbent has name recognition, an established list of supporters, a contributor list, a track record, and lots of constituents he has probably helped. It's harder to replace someone in the job-the public tends to like the stability of someone they are already familiar with as opposed to someone they don't know. And, of course, it is often very expensive to run against an incumbent.

The track record of an incumbent is critical to know. Talk with local reporters. Most are not as difficult to approach as one might think. It is unlikely a reporter will let you see the files concerning an incumbent, but most will talk freely about an incumbent's record and style. Obviously, press people are a wealth of information, not only on the candidates, but on the issues that may be surfacing during the campaign. Tact and careful charm might convince a reporter to level with you about your own chances. **Always do more listening than talking as this could be the positive start of your own relationship with a reporter assigned to cover your race.**

Outline the strengths and weaknesses of any and all prospective candidates in your race. Talk with people who may have worked on these campaigns to find out about the issues and campaign styles of your possible opponents. Find out about your opponents' and the in-

cumbents' background and history--and expect that they have already done the same research on you.

If you are running for a legislative seat, you should contact the leaders of the party caucuses. Most parties usually have campaign committees that recruit candidates and assist with campaigns. Let them know of your interest in being a candidate.

The legislators and their staff will provide useful information and assistance. Also, if they know you are going to run, they are less likely to go out and recruit another candidate.

The best option for understanding your electorate is to commission your own poll with a bona fide pollster who knows your electoral terrain. A good poll will cost from a few thousand dollars to "serious" thousands of dollars depending on the sample size you test. A "benchmark" poll is the traditional first step in evaluating the voters by issue identification and demographic breakdown. This first poll will outline what the district looks like and is the initial planning tool for targeting whom you will go after and where you will find your prospective voters. In campaigns where money is painfully tight in the beginning, you might want to use another poll for free or a small cost that was conducted for a candidate also running in the area (but obviously not against you). In these piggyback polls you buy a few questions in a much larger poll but get a good demographic breakdown of the district.

Getting Down To The Wire

You are getting close to making your decision. By now you should have assembled a core group of advisors--people you trust to help you make the right decisions, not people who necessarily can run your campaign. These are people with whom you can be open and candid. Historically, campaigns have evolved to include the close assembly of friends and/or family that the candidate will rely upon for advice on key issues and decisions. The structure may be informal, as in around the kitchen counter over coffee; or it can be standardized with regular meetings.

Your "Kitchen Cabinet" might evolve into a Steering Committee. Generally, this Kitchen Cabinet meets as time warrants and needs arise. If there is a major, radical turn of events, (the entry of an unexpected strong contender, the firing of a key campaign worker, the press coverage of a scandal involving the candidate), you need to know now how you will react. This group, by its nature, should be small. A close friend or two who is not formally involved with the campaign, along with the campaign manager and/or communications director, a mentor, one or two members of the Finance Committee or Steering Committee, along with the pollster (if you have one) are often players on such a team. Members must be close confidants whom the candidate will actually listen to in times of great stress or difficult decisions.

So You've Decided To Run--What's Next

You've taken an assessment of your health, family, and finances. You've studied the issues and gathered early support from your friends. And you have come to the conclusion that you're ready as ever for the challenge.

Once you have made the decision to run, the campaign game plan, your theme, and the general campaign strategy now become your top priorities. The soul-searching, the intellectual arguments, and the hand-wringing are over.

Your campaign starts the moment you decide to run.

Good Luck. You are about to embark on a journey unlike any other.

Chapter 3

Getting Started

Oh, those early days of a campaign – can there be anything more chaotic?

Answer: Yes. The last days of the campaign.

In the first month, everything seems like it should have been done: open the campaign bank account, file the official papers, secure a treasurer, decide on where the official campaign address should be, go visit yard sign vendors ...

What? Yard sign vendors? No, no, no. That comes much later. Right now your job is to do the first things first: build your campaign base upon strong information and research. There is an institutional memory that has been developed by political parties, professional political consultants, and organizations like the National Women's Political Caucus, the Women's Campaign Fund, and others on the techniques and timeline for a successful campaign.

The early days of a campaign offer time to think about your overall direction. Once a campaign takes shape, it is difficult to change it. Setting the pace and following an organized strategy based upon early good research vastly improves chances of winning. Although new developments must be dealt with as they occur, trying to build a campaign with information gained by osmosis along the way can lead to one problem after another.

All campaigns are research-based operations. It takes about a month to collect the information needed to put a campaign plan together. And, it is research that can be confusing if you don't organize it as you go. The information you will need breaks down into several categories:

- Information about the candidate
- Information about the electorate
- Information about special constituencies
- Information about the opposition
- Information about constituencies in the district
- Information about the media in the area
- Information about rules and regulations

The Candidate

Everyone has positive and negative features associated with her personality, background, experience, and profile. No one is a perfect candidate. The value of doing an accurate candidate evaluation is to determine your candidate potential and to identify ways to accentuate your strong points and minimize the weaker traits.

Since we traditionally assess ourselves less objectively than others, have people who know you evaluate your profile. Assess both the positive as well as the less positive attributes. Then, bring that Kitchen Cabinet, your core advisory team, in for a reality check. What will they say? Ask them about your characteristics that you and your campaign team think are true.

Positive Candidate Attributes

- Convincing • Achieves goals
- Approachable demeanor • Has a strong, resonate voice
- Pleasant appearance • Has compassion for others
- Good public speaking ability • Shows a good sense of humor

- Influential friends and relatives
- Can say “no” in a nice way
- Exhibits good personal discipline
- Smart
- Intuitive
- Good stamina
- Articulate
- Straightforward
- Can delegate
- Can make good decisions
- Great organizational skills
- Well-educated
- Known to be good with the media
- Honest
- Can raise money on the phone
- A quick study

Less Positive Candidate Attributes

- Sloppiness
- Hyperactive
- Aloofness
- Petty
- Indecisive
- Weak or wimpy
- Refuses to listen to people
- Hears only what she wants
- Not trustworthy
- Shallow
- No agenda
- Argumentative
- “Loose” character
- Hot temper
- Abrupt
- Boring
- Vindictive
- Too aggressive
- Talks too much
- Too detail-oriented
- Condescending
- Wishy-washy
- No self-confidence
- Too pushy
- Drinks too much
- Unreliable

By themselves, each of these characteristics neither makes nor breaks a candidacy. But, if the public perception of you contains too few positives and too many negatives, you may want to reconsider. In most cases, it helps to be aware of the way other people see you. One adage of the campaign business is that the public can detect what a candidate is ...and more importantly, what a candidate is not. It is easier for campaign staff members and consultants to bring out the best in you than to make you into something you are not. Accent the best, be on guard about the rest: prospective funders, supporters, reporters, and the public will be watching for character traits they want, or do not want!

Special Constituencies

There are many special interest groups in each legislative district, and not all have equal clout, financial resources, organizational ability, or influence with the voters of your district. Research what they have done in the past by talking to the leaders of these groups. Find out what type of campaign support activities their groups have provided in the past and will consider this election.

Some of the common special interest groups include:

- Senior organizations
- Business groups

- Building & Property Management Associations
- Environmental groups
- Women's groups
- National Abortion Rights Action Leagues
- Teacher, parent and education associations
- Homeowners groups
- Labor unions and professional associations
- Bar Association
- Trial Lawyers
- Medical Community
- Police and fire associations
- Political party organizations
- And, other labor unions and professional associations

Find out what groups have endorsed candidates in your race in the past, either formally or informally. Even though some groups may be prohibited from officially getting involved, in practice, strong leaders in those organizations often do, and members usually follow that lead. Start to build the network in each of those constituencies by getting to know the key players involved in previous campaigns. Ask what inventories of material each might have on file. For example, teachers associations may have precinct maps and lists of all their members who have worked on previous campaigns. Labor unions may have phone bank locations where volunteers can make calls and people on their lists that can be counted upon to phone bank.

The Media

Free or earned media plays a critical role in defining your candidacy and publicizing your message. It is imperative to meet all the key reporters who will be covering the race and all those who will contribute to stories that may influence your candidacy. Find out what the editorial policy has been on key issues and if there are any other special policies or unspoken rules that may exist. Know the circulation and who reads the newspaper. In many cases, the newspapers have very good demographic profiles of their readers--clues to the kind of voters that may be on your targeted lists. Compile a list of every news organization that covers your district. Be sure to include trade journals and even include the supermarket shopping guides.

Rules And Regulations

The spring months provide time to do one of the more boring tasks of the campaign: read and understand the rules, regulations, ordinances, laws, and procedures that accompany each race. In these days of public disclosure and the public's "right to know" what each candidate is raising and spending, regulation is part of the game. In most states, some form of campaign restrictions apply, such as zoning regulations regarding yard signs. There may be limitations on contributions or restrictions on who can contribute. In addition, your track record on issues or your personal ethics may place limits on contribution sources, either self-imposed or dictated by others.

Even though you have lawyers on your team and a campaign manager who has dealt with the election laws before, review the rules at least once for yourself to understand the basic guidelines. Knowing the law can eliminate later grief and aggravation.

Find the closest election regulatory office and talk with the officials about the most common abuses of regulations. Get the applicable forms and qualification explanations. Check within your own team of supporters to see who has previously dealt with the regulations. In some states, the regulatory agency will send a representative to a campaign team to answer questions and

explain the laws. The first items to go on the master calendar should be financial reporting deadlines and your own deadline to review report forms, usually two days before the official deadline.

How To Get All the Work Done

Sounds like an awful lot of work, doesn't it? Well, it is. But, the research phase of the campaign is too critical to cut short. In fact, misinformation or incorrect assumptions are better discovered now than in the heat of the campaign's last days.

Research takes time. Although you will want to have most of this information for your own review, call upon others to help obtain the different reports. This becomes a perfect test to see how various individuals might fit into the Steering Committee.

Assemble the tasks and find reliable people who have said they want to be involved in the campaign. Don't be afraid to ask people whom you have always admired to be part of the early team. You might also want to ask people who have gathered this information for other campaigns to help out with your tasks.

The Candidate's Early Energy

As the campaign strategy begins to develop, you will undoubtedly become anxious to start official campaigning before all the charts and analyses are completed. DO YOUR HOMEWORK. This is one way women save money and traditionally end up with better campaigns: we do know how to plan based upon the facts in front of us. Get the facts and figures before you build a campaign plan.

But, if you are still itching to get going, there is a lot you can do from the moment you decide you're going to run.

Early energy invested in beginning to identify key supporters and overall planning will save hours of "catch-up" research later in the campaign when you can ill afford it.

Visibility

No matter when you officially announce, there is time each day to be visible in the community. Find reasons to address important key issues on behalf of those organizations to which you belong. Look at the local and state public hearing agendas. If there is a problem or concern that you are well-versed in, round out a succinct speech on the matter to present when it comes before the local governing body.

Note important community events, from local banquets to the annual meetings of key groups that command attention from both the public and the press. Even if it means you must go alone or with people you hardly know, take advantage of these events to understand special interest group concerns and to begin to build your contacts in each one.

Attend the monthly meetings of key groups that will endorse a candidate in the election cycle. These include women's organizations, minority groups, environmental groups, local education and parent organizations, as well as homeowner and neighborhood groups. These activists are far more likely to think kindly of you if they can recall other meetings besides the endorsement one that you attended.

Get out and be seen at the annual bikethon, walkathon, marathon, and other events for charities and social service agencies. Being seen as a healthy, compassionate member of the community will enhance your early visibility.

Key Contacts

Traditionally, what a candidate does after determining she will run, is go through a list-generating exercise. Candidates have been known to decide to run and then go on vacation or a retreat for the next two weeks to read and underline names from the telephone book. Identifying your key support and all the people you know, think you know, or should know is important. Start listing those groups you used to belong to or still belong to and see if you can obtain a full

list of the membership. From this point forward, always remember to ask for lists of people in organizations where you have supporters or where you could find supporters. If at all possible, put the lists on computer discs to send those members information about your candidacy. Also, write down the names, telephone numbers, addresses, and emails of the key leaders of each group as you find out who they are. Call them and jot a reminder note about the nature of the conversation for future reference.

When the word is out that you are considering a run for office, you can get an appointment with just about anybody you call. Take time in the early days of the campaign to talk with people more at length than you might be able to do at the close of the election season. In these early meetings, you really only have to answer one question convincingly: **why are you running for office?** The rest of the questions will be good practice and indicate what you can expect in the rest of the campaign.

Most early visits with movers and shakers involve asking them about your chances for winning, how they think the campaign should be run, what they think the important issues are, who the good people are to run key segments of your campaign, and other questions that define the type of campaign you will have to wage. You might also ask about perceptions of your opponent, the past campaigns for the seat you seek and items to be aware of in the campaign. Before you leave, ask if there are other people you should call and/or make an appointment to see. Also, don't forget to ask if you can depend upon their support. If it seems inappropriate to ask for support, ask if there is anything you can do to improve your chances of getting their support. Some candidates use a tactic of asking that they be given the courtesy of a call from that person if he should decide to support someone else. Still others prefer to make a date in the future when she will check back with the person solicited for support and see if he may then be ready to give support and contributions.

Early Money Raises More Money

How much can you afford to contribute to your own campaign? In some states the amount is regulated; in other states there is no limit. In many instances, it helps to raise money by showing that you can at least contribute 5 to 10 percent of the total anticipated budget. In other cases, you want to be able to ask people to contribute amounts equal to what you have given. In still other situations, candidates want to minimize the amount of personal money they put into the campaign because they know they will end up paying for a lot of incidental expenses. While no rule applies for every candidate, it is safe to say that you should give what you can, and then some.

Each day brings a new opportunity to raise money. Nothing is ever as hard in the entire campaign as asking for money. Though it is the task most candidates least enjoy, you need money almost immediately upon deciding to run. Now is a good time to do your own personal inventory of people who can raise early money for the campaign.

Make a list of the close friends and relatives who can afford to contribute early. This list should include from twenty to fifty people. Look up their phone numbers and make a few calls a day. One or two calls daily will help you practice for the longer telephoning periods you will have to schedule in the very near future. Know what the campaign spending limits are and ask those friends and relatives who are in a position to contribute.

Input the lists collected onto a computer database so you will be ready for the first direct mail solicitations that usually coincide with your official announcement to run.

Early money is hard to raise; even frequent contributors are reluctant to donate until they know that there isn't a stronger candidate. People are not excited about campaigns in general until much closer to the end of the election season, and they would prefer to wait until they can be assured the campaign, as well as the candidate, has proven that the race is viable and winnable.

Preemption Strategy

If there are a lot of people who are considering a run for the office you seek, you want to look well-organized as soon as possible and give an appearance of strength and depth. You want to be the campaign out in front; the one against which the rest gauge their progress. And, you would like to be able to convince some of the other candidates, or at least the one most likely to take votes directly from your totals, to drop out and support your candidacy.

Although preempting another candidate can be difficult, it never hurts to try. Once you have decided to run, the conventional strategy is to move out in front, announce your candidacy, and present as strong an image as possible. Have small cards printed with your name and the office you seek and hand them out to everyone. Let the press know you are in the running and keep reminding them.

You may want to talk directly to potential competitors to show them you mean business and already have a strong campaign organization and strategy. You may want to solicit early support from key advisors of others considering a race against you. Whatever the approach, preemption strategies are designed to give you an early push and make other candidates think twice about jumping into the race.

However, such strategies can backfire and prompt fence-sitters into jumping in now because you have, and thus accelerate the race to shore up support from key contributors. Had you not announced or attempted to preempt someone from running, you might have been able to slowly round up more support before your opponent decided to run.

Seven Simple Preemption Strategies

- Have more volunteers visible at early events
- Have more money raised
- Get your name in the press more often
- Collect early, important endorsements
- Have the first direct mail (see chapter 13) on the streets
- Have the first yard signs springing up all over the town
- Have the first campaign headquarters opened

Getting Yourself Ready For The Campaign

How is the family vehicle holding up? Is it time for new brakes or getting the taillight fixed? You will rely upon that car to get you where you need to go, be sure it is in working order before the campaign schedule requires it be in optimum condition.

Family finances, whether they are the monthly bills or the tax returns, need to be handled while you run for office. If your part of the family responsibilities has traditionally included paying the bills, see if someone can help you out--either within the household or within the circle of friends you can call upon to help you personally. More candidates than you might imagine have received notices of their phone, electricity, or gas being turned off because the bills just didn't get paid during the heat of the campaign's last days. Also, it doesn't reflect well upon the campaign or the candidate if neither can get organized enough to pay the bills on time.

Depending on your financial status and how much the telephone is used at your home during non-campaign times, you might want to install another phone line in the house or invest in a campaign cell phone. Many campaigns report the second line or phone was something the candidate should have put in at the start of the campaign, thus averting phone battles at home. The candidate must have an answering machine or voice mail and an established procedure for anyone answering the phone at home when the candidate is not available.

You should also have a separate campaign email, where all campaign related concerns go and from where your campaign newsletter is sent. This is the address you give to your entire

constituency and put on all of your campaign materials. These days you can't get away without having your own website as well. Your website should have your picture, political biography, your platform for winning, and a little bit on your positions on issues. Having information about you readily accessible to guide people towards will answer a lot of first-round questions. However be careful not to include the opposition research your opponents are looking for on your own site.

Running for office allows little time to keep the house in order. In some campaigns, a volunteer, neighbor, or eager campaign worker will offer to give the house a once-over cleaning each week. In other campaigns, friends and colleagues who are not anxious to work on the campaign itself will volunteer to take care of the children a few times a week or assume your role in the car pool to school.

Establishing time to stop and think is more critical than you will ever appreciate. Take time for your family and yourself and designate specific times during the week that are set aside for rejuvenating yourself, spending quiet time with the family, and just plain thinking.

Chapter 4

The Campaign Plan

The campaign plan is your business plan for winning at least 50 percent plus one of the votes. It's a written document that outlines what needs to get done, when, how and by whom. With so much on the line (time, people, money, friendships, causes, and changes), a campaign must have a clear description of the strategy, money and people it will need to succeed in its overall objective--an election night victory.

A campaign becomes more understandable when there is a written blueprint to follow. With so many distractions and competing lists of things to do, campaigns are exercises in futility if people just sit around and talk about what should be done instead of following the blueprint of campaign priorities. This plan should contain:

- **Background Premises:** what do you know about the backdrop and environment that will help you know what to do; what do you have working for you and against you; what's working for and against your opponent; what kind of an election turnout will you have; what else is on the ballot;
- **Overall Strategy:** what will you do to win; what will your opponent do; what outside factors must you compensate for; what must you do early; what ground are you likely to concede for greater gains; how will you get the resources;
- **Message & Slogan:** what polling, focus groups or other research do you have to build a message that resonates with your voters; how will you "connect" with targeted voters; what will you say about yourself as well as your opponent; what will your opponent say about himself--and you;
- **Targeting:** how will you identify the voters you will spend your time and money trying to reach; will you want to reach "micro-targeted" voters with specific messages and strategies;
- **Summary of the Issues at Play in the Election:** what is your history and what are your accomplishments--as well as your opponent's--particularly in the areas the public is clamoring to hear from you;
- **Budget:** how will the money be spent to maximize your message and name recognition; what kind of cash flow chart do you need to have money at the rate you need to spend it and when do you want to spend it;
- **Fundraising Plan:** how will you raise the money required to meet the budget;
- **Field Plan:** what's the strategy for rallying the grassroots effort that can raise recognition of your name for less money; how will you identify your targeted supporters and get them to the polls on election day; how many volunteers will you need and where will you find them; will you walk in parades, attend every precinct meeting, concentrate on community events, or make yard signs your priority;
- **Media Plan:** how will you earn press attention from the broadcast and print media; what reporters will you want to know and want to court; what press events should you have; what will your core press packet and photos look like;
- **Timeline:** what needs to get done by when; what are the critical deadlines and reporting dates; when do the absentee ballots get mailed; when do key endorsements come out; when will your major voter contact piece come out?

Every campaign plan must be a flexible document. No plan is ever absolutely final. Each day involves fine tuning the campaign as you see how the implementation of your game plan actually works.

Building a proposed plan of action is the best way to reduce the number one early problem of campaigns: fear of not doing all that you should and getting too far behind.

Background Premises

There is much you can do to predict the back drop of the campaign. First start with the nature of the political year you face: is this a presidential year? If so, then prepare for a heavy turnout. If it is an off-cycle election where few state or federal officials are on the ballot, then there will be as few as half the voters you see in a presidential election. Will there be other initiatives on the ballot? In elections where tobacco restrictions are being voted upon, you can expect a larger number of progressive or liberal voters. If there is an election issue which would cap taxes, a larger number of conservative voters can be expected. If there are measures for which there is a lot of advertising, then there could be more people coming out to vote for or against the status quo. And, if you fall into an incumbent versus challenger status, you could be affected by the extra voters coming out to support another issue.

If you appear way down on the ballot, there will be fewer voters even casting a choice in your race than in races further up the ballot. All of these require consideration before you calculate how many voters will vote, and how many votes you will need to win.

The basic overview includes the pros and cons of your own candidacy and what the same pros and cons might be for your opponent. Though many think that media campaigns reduce candidate profiles down to pretty pictures and sound bytes, the public will be looking for other characteristics upon which to base whether they like you or not.

It's good to put these pros and cons in writing.

Overall Strategy

- How will you actually win? Basic strategy can be as easy to formulate as a series of points that leverage the strengths you have and minimize the weaknesses you acknowledge. It takes into consideration whom you will rely upon for endorsements, key fundraising donations, important inoculation against any problems, and steps you will take to make the campaign unique.
- The overall strategy tells you where you focus your priorities and centralize your efforts. It will tell you what you must do to gain traction and build the momentum to go into the last thirty days. For example, it details that you might rely on cable TV if your opponent is likely to walk the neighborhoods more than you. It says raise money from the environmentalists first as they are your base and might help you get the environmental Political Action Committees (PACs) to do work on your behalf.
- If you are running against a known party insider, then you might want to minimize your efforts to garner all the district party endorsements in the primary, but go after more community endorsements in the pre-primary campaign.
- Your strategy must also consider what would your strategy be if you were in your opponent's shoes? After you look at your strengths and weaknesses, and know what to do about the overall electoral environment, what would you be advising your opponent to do to beat you? Many campaigns miss this critical step, but to do so is risky business. If you talk about your opponent's strategy truthfully, then you are in a much better place to be able to confront, confound, and co-opt it to minimize damage to your own campaign.

Message And Theme

Many candidates ponder their theme for weeks; others don't think about it at all and just answer the basic questions asked of them. Still others change the central message of their campaign all the time.

The theme is the summary, the catchy image of your campaign message. It tells people why you are running for office and why you think you are the best person for the job. It also connects

your key subject, style, or feeling with the voters. The theme can be packed into a few words or slogans:

- Working for families
- The candidate who thinks like you do
- Honesty in government

It can be a simple sentence that directly answers the question of why you are running:

- Farmers first
- Think globally, act environmentally

Or, the theme can be a more generalized series of statements that conveys a direction the candidate and the district ought to be headed:

You work hard. You play hard. You put your family and community first. So do I. But with all the layoffs and plant closures, this town is headed for trouble. I say, 'Let's put progress back on the table and John Doe out of office.'

Traditionally, the campaign theme is the simplest message you can convey to voters that will excite them about you. Many candidates fall into the trap of telling people too much about issues the candidate wants to talk about instead of issues the voters want to hear about.

Developing a theme and message should not be done by trial and error. The easiest way to get on the same wavelength with the voters is to test your proposed themes in a poll. Pollsters will usually put a long list of possible themes in a series of questions. Then they call registered voters in your district, ask the questions and compile the results.

If you lack the money or expertise to commission a poll, focus groups might be an option. However, you should talk with as many independent people as possible during your first months of intense research to see what people respond to the best.

Theme has little to do with specific issues; it has to do with style. How you can effectively and sincerely communicate your energy and desire to help the people of your district will determine your viability as a candidate and your competitive edge against your opponent.

Ideally, it is easiest to keep the same theme throughout the course of the campaign. However, you should not be so locked into one theme that you cannot make mid-course corrections if polling, circumstances, or voter response indicates that something is not working out.

For the theme to be effective, it needs to be repeated at every opportunity. It may end up on your website, bumper stickers, buttons, brochures, as the last scene on the TV spots, and in the text of all speeches. Even though the theme might seem overused or trite for some of the more sophisticated voters you face, remember that the theme probably has to be repeated a dozen times before it sinks into the voter's train of thought. When in doubt, stick with the theme you initially agreed upon.

The Message Matters

To put a twist on one of Marshall McLuhan's famous aphorisms, the campaign IS the message. It is the rationale around which everything else should be organized and structured. As a woman candidate, what you say and how you say it are critical; they are among your most important tools for winning votes.

As a women candidate, you may have fewer campaign resources at your disposal for communication. That means it is critical that you constantly focus on your targeted voters and have a clear, direct explanation of your candidacy that connects with those voters. Here are some suggestions:

- **Avoid The Trivial.** Slogans like “Time for a Change” or “A Vision for the Future” don’t really tell the voters what your campaign is about and why they should support you. One of the following might better provide the average voter with a reason to vote for you:

“Reelect Judge Fay Ray. Keep Her Experience Working For You” or “Reelect Judge Fay Ray. Seventeen Drug Dealers Given Life Sentences.”

- **Keep It Simple.** You should be able to distill the essential rationale for your campaign to one 3 x 5 file card. If you can’t, it will be too much for the campaign to communicate effectively and too much for most voters to remember. A short concise message will minimize spin.
- **Keep It Focused.** You don’t need twenty new things to say during a campaign. You need twenty new ways to say the same thing. If improving education is one of your main themes, develop eight examples of what could be done better and dole them out at news conferences one or two at a time.
- **Keep Repeating It.** Which 1988 presidential campaign aired the greatest number of negative commercials? Bush? Wrong. Bush aired only fifteen. Dukakis aired forty-nine (source: Political Commercial Archive, University of Oklahoma). Now, which presidential campaign was most effective at getting its negative message out?
- Bush, obviously. This is not to advocate negative campaigning. Rather, it is to advocate consistent, focused communication. Don’t say something once and move on, thinking the voters have heard it. There is truth to the old adage that “only when the candidate is sick and tired of saying something (and the press is sick and tired of covering it), have the voters begun to hear it.”

Issue Development

Every new volunteer in a campaign usually wants to be on the public policy Issues Committee, thinking of course that issues will determine the outcome of the race. Not true.

It is true that issues are the platform upon which the campaign theme and style are portrayed. However, your style, personality, ease with the voters, perceived integrity, and your ability to identify with the voters often has a lot more to do with getting elected than your position on building a new performing arts center or strengthening local law enforcement.

Generic issues that find their way into more platform speeches than others include: protecting the environment, making our streets safe again, providing better education for our kids, increasing economic development (if the economy is poor), stopping uncontrolled growth and development (if the economy is good), cleaning up government, making government more fiscally accountable, and keeping government off people’s backs.

One of the most important roles of a Steering Committee, or Kitchen Cabinet, is to help ground you in every aspect of the key issues. You will have to answer many questions that come up as regional problems (unemployment, trade, business diversification, drugs, health concerns, water quality, pollution, and others), so it is imperative to be thoroughly prepared before you run for office and “hit the campaign trail.”

In some campaigns, you will be able to choose two or three issues to highlight. Such issues must fit your strategy, strike a chord with the voters and be important to the community’s agenda. In other campaigns, the debate may be determined by a pollster, the press, other races on the ballot, current events that unfold through the course of the election cycle, or in the worst case scenario, the agenda may be set by your opponent. The goal is to have the research done on the important issues so that you can set the agenda before your opponent does.

Targeting

Finding the votes you need to win requires obtaining the most specific voter lists possible. This will enable you to spend your money more effectively in your efforts to reach the voters. After researching how people voted in past elections, you will have massive amounts of data to

review. There is no need to reinvent the wheel. Sit down with a small group of people, a political consultant or expert you respect, or your Steering Committee to work through these numbers.

From these demographics and computer runs, you are building a file that tells where to find the voters you want to “swing” your way. In most districts, there are precincts where voters are more likely to cast their ballots for people of your party, position, or experience. There are also those precincts that seldom vote for your kind of candidate. Also, there are precincts that are hard to predict because the constituents will vote for your type of a candidate in some races, but not in others. You need to carefully identify those “swing” precincts and make them part of your high priority target.

In addition, you will want to find voters who may be inclined to vote for you based on demographic, not necessarily geographic, information. For example, if you are a young woman running against an older man, young women may be part of your target. Determine through your early research which groups will find your message most appealing and add them to the target. Age, income, education, length of residency in the district, homeowners or renters, sex, and other factors should all be considered.

Next, check out the voter history. You may want to target only those voters who have voted in every one of the most recent elections or those who voted in only one of the past four elections. Always refine your targeting. This involves getting updates from state or local election offices regarding newly registered voters and prospective voter registration drives planned for the election year. In addition, absentee ballot trends are increasing in most parts of the country. This may prompt you to target all of the traditional absentee ballot voters. (See Chapter 7 for further details on targeting).

The Budget

No other part of the campaign plan is more important than the budget: the nuts-and-bolts translation of how you will spend money to get votes.

Researching past campaigns will give you an idea of where to start. How much did they spend? Did they have paid staff people? How many? Did they spend money on TV or radio? How many yard signs did they have? How many brochures? These questions and many more need to be considered when planning your budget.

Not every budgetary decision is made in the first thirty days of the campaign. In fact, a good campaign budget is probably best updated every month.

There are eight basic categories to include in your initial budget:

1. Voter contact
 2. Media
 3. Salaries
 4. Consultants
 5. Fundraising
 6. Office expenses
 7. Printing
 8. Miscellaneous
- **Voter contact** includes items such as voter lists, labels, postage, mailings, graphics, T-shirts, buttons and bumper stickers. Other campaign gizmos such as balloons may fit in this category.
 - **Media** includes all newspaper, Internet, billboard, radio and television advertising. For the media budget, find out what other candidates have spent. Add or subtract accordingly. Check with the local TV stations and request an update on the costs of the political ads. Do the same with the radio and newspaper ads so you can see what kind of strategy you will need to fund.

- **Salaries** are determined by your budget and the size of your campaign. You may want to list a campaign manager, a press secretary, a fundraiser, a volunteer coordinator, a field coordinator, an office manager, and a scheduler. In most local campaigns, one or two paid staff is probably all that can be afforded. You can consider more paid staff should you have money to pay for more help. In many campaigns, enthusiastic volunteers handle key responsibilities.
- **Consultants** offer a variety of specialized campaign-related services. They work on a contract basis, and their fees are generally negotiable. In recent years, more and more campaigns have been hiring consultants for very specific tasks. These consultants may include:
 - **General consultants** to help with the campaign plan formulation, targeting, message development and keeping the campaign on track
 - **Pollsters** who write the questions, supervise the telephone poll takers, and analyze the results
 - **Media consultants** who write, produce and place radio, TV, print ads, and produce direct mail.
 - **Speech or debate coaches** usually involve a one-time fee paid to a professional who will sharpen the message delivery and presentation of the candidate's public-speaking style
 - **Computer or database consultants** help coordinate those lists and field components so they are working together. In most cases, the computer expert will prescribe a special database for use in all aspects of the campaign: campaign contributor reporting, volunteer lists, endorsements, yard sign locations, and identified supporters. Once the program is purchased, the database person will train the key staff members to use the program to its fullest potential. She should remain on call throughout the campaign to help in those panic situations when the computer crashes at a critical time.
 - **Image consultants:** An image consultant helps you get your presence in sync with your message. She helps you decide how you want to look: mature, serious, working woman, professional, approachable, etc. This might include your hair, clothes, make up, even your shoes and jewelry. She can go shopping with you, critique you at a public presentation or just videotape you giving a speech and review the results.
 - **A photographer** is the least appreciated but perhaps most critical of all the consultants. Campaign pictures are very important and many campaigns wait until the candidate can no longer stand her unflattering picture in the afternoon newspaper before taking a good picture of the candidate. Candid photos of the candidate are always needed for brochures and other media productions. A smart campaign begins collecting photographs early and doesn't stop until the victory picture is in the newspaper the day after the election.
 - **Fundraising** follows the old rule: you have to spend money to make money. It takes expenditure of what little hard-earned money you have raised to reach potential new contributors. Mailings, events, celebrity fees, and other expenses will crop up as you move the fundraising plan into full swing. Anticipate each fundraising expense and plan accordingly.
 - **Office expenses** will constitute between five and ten percent of your budget. Try and get as many of these resources donated as in-kind contributions so you don't have to pay for them yourself. Some office expenses include:
 - Rent
 - Utilities
 - Telephones
 - Computers
 - Fax machines

- Cellular phones
- Office equipment
- Supplies
- Copy machines or copying expenses
- Newspaper subscriptions

Be realistic and do some homework. You don't have to do extensive pricing for each category, but some quick calls to office supply and printing companies or a review of an office supply catalogue can help determine expenses in each budget category. This should be a reality check process, not the good guess department. Also, find out what kind of investments past campaigns have made in these areas.

- **Printing** costs can be determined by looking at the number of targeted voters and estimating how many times you will mail to them. Take a state legislative race for example, where you have targeted ten thousand voters that you want to mail to three times. That's thirty thousand brochures just for your mailing. You will also want brochures when you canvass door-to-door and when you go to various speaking events. Some campaigns will be lucky to afford one mailing to all the registered voters who traditionally vote in every election. Be as realistic as possible in preparing your printing budget. You might want to make sure you contact a union print shop; political wisdom dictates that if you want union support, you will need to use a union printer.
- **Yard signs.** Find out what the candidate in the last campaign spent and be sure to include the cost of the sticks required to put up the signs.
- **Miscellaneous.** Every campaign is filled with about as many good ideas for getting votes as it is filled with good people. The problem is that most of these great ideas cost money, and although creative, few of these great, innovative ideas will get you as many votes as the direct mail, radio, or TV strategy. However, you don't want to thwart the enthusiasm of the wonderful team you are building ... and great ideas can sometimes cost pennies. You might want to include a "good ideas" account which would be a budgeted unit that everyone knows is there for the best idea implementation. Put a lid on such a category (\$200 a month for example) then let your volunteers and field people come up with creative ways to spend it.

Budgets are as complicated for a campaign as they would be for any small business with such ambitious marketing goals. Often, 60 to 75 percent of the budget should be allocated to the voter contact and the media categories; the larger the race, the higher the percentage of the budget that goes to media and voter mail. Salaries and fixed costs should always remain under 20 percent of the total budget, no matter how difficult that might appear for even small campaigns.

The budget should be a realistic translation of the campaign's strategy: do it accurately, strategically, and cautiously. This is no time for creative writing or short cuts. The time you take to do the budget carefully the first time will result in less panic time later on in the heat of the campaign (See the budget forms at the end of this book).

The Fundraising Plan

Radio, TV, direct mail, brochures, yard signs, and buttons all have one thing in common: they all cost money. There is little you can do in a campaign that does not cost some money. Even the most ambitious candidates who want to begin early door-to-door leafleting, has to have something to leave with the voters.

There are many reasons to wait for research to be done before launching the campaign plan. However, there is no reason to wait to raise money.

A fundraising plan is a written description that allows you to plan how, when, and from what sources you will raise money. It enables you see what roles others need to play to keep the cash flowing into the campaign at critical times.

The fundraising plan should list the possible options for raising the thousands of dollars it will take to meet your budget. The fundraising plan should include a chart that outlines all items and the corresponding months when activities in each category are expected to be carried out. Common categories in the plan will include:

- **Personal phone solicitations** by the candidate to high donors
- **Loans** and direct contributions from the candidate herself
- **Meetings** with a few friends, supporters, or potential donors or small home fundraisers
- **Large donor events** usually catered at someone's home or at an elegant restaurant
- **Direct mailings** to lists of special constituencies
- **Finance Committee** that calls people and asks for donations
- **Phone bank calls** to previous contributors or those lists of people who have already received a mailing
- Celebrity events
- **Political Action Committees (PACs)** of unions, corporations, or other special interest organizations

Research for this plan should come from reviewing past campaign plans for the same office in the district. Check on how much money was raised by both sides of the ticket in the past election. Review the state and local election filings with the public agencies that monitor the campaigns, if your elections are regulated by law.

Make sure you have the benefit of a good review by a committee you trust to know what is realistic and what is just wishful thinking in terms of fundraising for your campaign. (See Chapter 8 and the Fundraising Plan form in the back of the book to help you draft your plan.)

The Field Plan

The field operation is the heart of your grassroots campaign. It will include your foot patrol throughout the district: the cast of happy characters in each precinct, town or neighborhood who will do the actual door-to-door work, the phone banking, the massive direct mail projects, the yard sign operation, and the other visibility-building activities designed to increase your name recognition.

Some campaigns will want to have their field coordinator on board to help devise the strategy that will direct the field operations. Others want a field plan in place first to know who to name as field manager. While every campaign may reflect the same basic principles in its organization, the field plan is radically different from one campaign to the next.

The field plan should be devised with help from people who come from different parts of the district and should reflect the local campaign peculiarities of each area. For example, when you design a plan for distributing literature, you want to take into account rural parts of the district where the homes are more than walking distance apart. In some areas, you don't want to attempt a phone bank on the night of the weekly church services or high school basketball games. In other areas, you need to increase staff and volunteers for important community events such as crab feeds, fairs, or holiday celebrations.

When building a field plan, start with the candidate's current name recognition and favorability rating. If you have good polls that tell you the candidate is known by over ten percent of the prospective voting population, then you know you have to get another 40 percent to recognize you well enough to vote for you. Many candidates who start out with less than ten percent name recognition build up to within striking distance based upon strong field campaigns.

If a candidate is not well known, the voter contact plan should define how many times and by what approach each targeted voter will be reached. In most cases, the campaign should plan on reaching the targeted voter at least seven or eight times. The field plan determines in which order and how each contact is complimented by the past contact.

The field plan works as an inverted pyramid: starting slowly with a strong, small base and then multiplying with increasing numbers of people, money, and other resources that reach more and more voters. Your job in building the field plan is to direct the local activities so they reach the largest number of voters who are most likely to vote for you.

The plan itself should outline the best strategy and message for each political subdivision in the district. From there the field plan should discuss which field and voter contact activities have worked well for other candidates and why these same tactics may or may not work for you. Add the targeting information that tells you where your most likely voters live. Determining how you reach them comes next, as you decide how much money and volunteer power will be needed to reach your target. Finally, the timeline of who does what and when will give you a complete picture of how the field plan will come together. Again, this is not a final draft you are writing; rather, it is a best-guess document upon which to begin the campaign. It will be revised as your opponent's strategy unfolds and other goals set for the campaign are met.

The Media Plan

Often campaigns establish written plans that refer to the media only as a defense mechanism: be ready when they call. Know how to get your point of view across when they ask questions you don't want to answer, and call press conferences when you want to emphasize an important issue or problem.

Creative campaigns are becoming far more serious and innovative about media strategy. First, inventory the important media people. This not only includes the actual reporters covering the campaign, but their city editors (the people who assign the stories and determine where each story is placed), copy editors (the people who write the headlines), the photographers, producers, anchors, weekend editors, publishers, and feature reporters who may write stories about other aspects of the campaign.

- Deadlines, home telephone numbers and email addresses of key reporters, staff changes, and all the specifics of newsroom dynamics need to be understood. In addition, the editorial policy or past goals of the newspaper or broadcast media station should be analyzed. By knowing their history, you can build bridges from your own platform to their goals and objectives.
- Many call the good media coverage they receive but don't pay for "free media." However, "good media" doesn't just happen for free: it is earned. Media plans revolve around knowing what your message will be and how you intend to take advantage of any earned media opportunities. Plan your strategy to include weekly meetings between the candidate or key staff and important media people. Reporters, editors, producers, and even photographers are very accessible people. Most of them appreciate a call or an offer to go to lunch.
- You might want to establish a Media Committee composed of public relations and marketing experts, former reporters, government public information officers, or people with journalism experience, such as recent journalism graduates from a local university who can devise innovative media events that will emphasize the candidate's focus on important issues. The Media Committee might also help review future paid media commercials and print ads.

The Timeline

How all the pieces of the campaign plan fit together so the real work can get done comes next. Once you have completed the research, prioritized the target audience, determined the message, and identified the media strategy, it's time to put it all on one calendar. Some people find calendars as large as a living room wall to be good planning devices. Others prefer the desk pad approach; while still others like regular monthly calendars. Choose the type that works for you and make it the central planning calendar.

Chart the major tasks on the planning calendar. The early months will be more detailed than later ones, as you won't know in the first thirty days how the strategy for the last thirty days will

play out. You will know some basic tasks that will take place each month but deciding a specific date will be more guesswork than strategy. The first month of the campaign will include organizational goals as well as key meetings and hiring important staff. The full outline of the calendar, however, will include: key financial reporting deadlines set by agencies that monitor elections, filing deadlines for all offices; dates when the new registration of voters stops; the date absentee ballots are released; state party conventions; partisan endorsement meetings; important community events such as county fairs, parades, annual VIP celebrations; and those dates which are set by some source other than the campaign.

The calendar timelines should include:

- Key financial reporting dates
- Key dates for important union, party, and other endorsements
- Filing deadlines
- Official announcement of candidacy
- Campaign headquarters opening
- Benchmark poll or focus groups
- Establishment of the Finance Committee
- Drafting platform, issue papers and special press releases
- Direct fundraising mail drops and deliveries
- Initial brochure
- Key volunteer rallies
- Media debates
- Volunteer newsletter publication
- Production of radio and TV ads
- Start date of radio and TV ads
- Door-to-door canvassing
- Phone banks
- Start of yard sign placement
- Dates when new voter registration stops
- Important community events
- Absentee voter ballots go out

How to Use Your Campaign Plan

Every campaign plan should have a summary: a quick review of how you will win. The summary should analyze where the votes will come from, how the money will be raised and spent, as well as strategic facts such as how you will get good press or develop a large volunteer base. Particular advantages you have over your opponent should be summarized, and you should have short explanations of how you intend to overcome important disadvantages.

Once you have all the components in one written report, you can mix and match the pieces within it for specific purposes. When hiring staff, for example, you might want to show them the budget, basic strategy, and press and field plans. To perspective donors, you would want to show the theme and message, along with the fundraising plan, budget and the summary sheet of how you will win. To Political Action Committees (PACs), you would show the targeting information, the budget, the fundraising plan, and a synopsis of the strategy outlining how you can win.

Print extra copies of the campaign plan and call your Steering Committee together to review it and suggest changes. Remember that the plan is not a foolproof document that has all the answers; however, a campaign that doesn't have one is proof of how unprepared that candidate may be.

Any good campaign plan includes a well thought-out set of methods that will let you find (and win) votes. But first, you have to figure out where your favorable voters are.

Chapter 5

Campaign Staff and Consultants

Putting your team together is a cross between building a business and starting a non-profit agency--all done at lightning speed. Before you begin campaigning in earnest, it's important to build a campaign that will stand the test of the end campaign: the staff, the rules and regulations, the vendors and consultants you will use and, most importantly, the chain of command and delegation of authority required to get the job done.

Many campaigns suffer from not putting enough early time into building a team, and as a result their campaigns are filled with power struggles, anarchy, or cumbersome decision-making layers that can result in disasters. Campaigns must be nimble; they must take advantage of the institutional memory of what we know works; and they must be fresh, exciting, and inviting. Start your campaign on the right track: know what the chain of command will be and who will be in charge of what from the beginning.

Operationally, a campaign is a small business. The same good management principles that exist in starting a professional business also work for politics. The one big difference is that a campaign must evolve in record-breaking time; and the key people who will run it may be the best you can get at the time instead of the best you could hire professionally. Regardless, your team must raise substantial capital, manage a budget, continually assign new people to handle important tasks, and learn to work together almost immediately. Early effort dedicated to making the team work as one unit is perhaps the most critical use of time in those exciting first days of the campaign.

The Political Consultant

In 1990 when we wrote the first National Women's Political Caucus campaign manual, there was little in the book about political consultants. In 15 years, the campaign consulting business has grown dramatically. According to the American Association of Political Consultants, there are more than 56 job categories of different professionals within the profession. From database management and web site development, from event management to high donor phoning, from field organization to image consulting, and from overall campaign consulting to TV media production, there are now thousands of people making their primary living off political campaigns.

Why do you need a political consultant?

A political professional should be the keeper of the memory of what has happened in previous campaigns, and she can give you a blueprint on how to run a campaign through the gauntlet of a fast-changing and often fickle public. A good professional consultant will save you money, help curb the creative ideas that might sound good but fly in the face of getting you votes, and keep the campaign true to the campaign plan that the consultant usually writes.

How do you find a political consultant?

Well, usually, they find you. After you file for office, they can review (usually online) the list of people filed with the campaign monitoring agencies such as the Public Disclosure Commissions which regulate campaigns. However, you should interview several consultants for the job. Call candidates and elected officials you admire and ask them who they used. A good consultant will follow the American Association of Political Consultant's code of ethics. Sit down and meet with these would-be advisors of your campaign, and see how the rapport builds or doesn't: there's no sense hiring someone you have to work to appreciate.

Questions you should ask prospective consultants

How do I win this campaign?

What do you know about this district that I don't know?

What's new this year in voter contact and campaign strategies?

How will I be using technology if we work together?

What do you see your role as being – and what isn't your job?

What kind of staff do you have and who from your shop would be assigned my campaign? What does your staff do and what will you be doing yourself?

What other campaigns have you done that are like mine?

Are you handling other campaigns in the vicinity? Who?

What and how do you charge? What is the average amount you would be making from a campaign of my size?

What kind of turnaround time would there be if I put in a phone call or e-mail to you?

Why do you want me as a client?

Before you meet with the consultant, you might want to do your own background research on the consultants. Remember that the business of politics is about “spin” – how political consultants can take information and “spin” it around in the most positive light to advantage their candidates. Make sure you are the client, and not the target of slick spin from a consultant. If they are good enough to move a country into thinking something negative is really a good thing, imagine how effective they might be in portraying themselves.

Fortunately, consultants traditionally do a better job representing their clients than themselves in marketing their assets and covering their deficiencies.

Make sure that prospective consultants have experience in races like your campaign. Make sure they have a reputation for working with campaign teams; some are dictatorial without necessarily needing to be. See how their rates compare with other consultants. Ask them about the most important wins--and the unfortunate losses. Never choose a consultant because they have an awesome-sounding win-loss record: they tend to forget many of the losses. Explore the style of the consultant (direct, brutal, dependable, intense, spread too thin, bad on the details, etc.).

Talk to others who have used them and ask about the relationship. Are they still strong acquaintances? Which candidates won't work with them and which ones would be honored to work with them?

Ask them about what their definition of ethics in campaigns might be. Women candidates have a bad rap of always asking whether a consultant will have to go negative against her opponent. A better line of questioning is to ask what kind of information about your opponent is important to get out, and what is not.

The Right Consultant for You

You don't want just a “spin doctor”--someone fast and good with words; you want someone smart and creative with fresh materials. In many campaigns, seasoned political observers can guess the consultant by watching a cookie-cutter version of an ad done seasons ago. You want a consultant who has done her homework--and knows the target, district, and direction of the voters to whom you must appeal. She should have talent your team does not have--and she should be eager to listen to your other advisors before coming up with the campaign plan. She does not, however, have to report back to them. The consultant's relationship is with the candidate and campaign manager. Your consultant should have expertise you need and can afford, with clients similar to you. Most of all, you need to have a comfort level with the political consultant that can stand the test of the stress, budget, and the timeline ahead. The bottom line: she should be experienced, accountable, and accessible.

The Wrong Consultant for You

Often candidates see themselves as running the most important campaign next to the President of the United States. They pick up copies or go online to check out the directories of the political consultants in the country (American Association of Political Consultants, Campaign & Elections Magazine, Political Directory by Carol Hess, Winning Campaign by Allan Locke). While you get points for researching the entire field, you don't want a consultant with a big name, bigger clients, and little time for you. You also don't want someone with no specific duties.

You don't want someone you will always be second guessing--or someone who wants to control your entire budget. Don't hire someone who can't explain how they bill. In fact, ask to see an invoice that explains a sample campaign bill for a month before a previous election. Ask what the mark up for materials produced will be. Industry standard is between 15 and 20 percent. Do they mark up other expenses in addition to campaign materials?

All of this is not to begrudge the consultant her hard-earned dollars: it's to know upfront what you will be billed and to eliminate costly expenses later on when every penny will be precious.

Staff

In addition to the consultant, there is a core of key players who will perform the most critical roles in the campaign. The job of the early strategy team is to help you find a campaign manager: no key appointments should be made without the manager's input and approval. If the day-to-day demands of an evolving campaign manager require an office manager before the campaign manager is hired, then make sure that the person you choose understands that the appointment is temporary until the manager is aboard. Chances are the campaign manager will be happy to have any help already assembled, but the final decision should be hers.

- In addition to the Campaign Manager, most campaigns will need:
- Treasurer
- Fundraiser
- Database/Computer Coordinator
- Communications Director or Press Secretary
- Scheduler
- Field Coordinator
- Driver
- Office Manager/ Volunteer Coordinator

Some of your key supporters will fit into these job descriptions. You will need to be honest, however, and realize which areas of expertise you do not have readily available in your volunteer pool. Money may need to be budgeted to hire individuals for at least some of those critical positions.

A campaign located in a political jurisdiction with a strongly identified ethnic population needs to have key supporters from that community involved in policy-making and strategy-devising decisions. You cannot hope to attract Asian-American support without having members of that community helping you identify the key leaders, important events, and critical issues.

In addition, you need to make the campaign an example of your strong affirmative action commitment. If you have an entire campaign of Caucasian staff members, volunteers, and Steering Committee members, you will be correctly criticized for not reflecting the ethnic profile of the community you want to represent. You can attract voters in ethnic communities by inviting leaders from the geographic neighborhoods, organizations, and unofficial networks to be

part of the inner team. They will know the voting trends, key fundraisers, important celebrations, and other levels of involvement that are traditional for the people involved.

Before you choose the team, it is important to look at everyone's job description, including the candidate's. Since your time is the most precious and finite resource of the entire campaign, it is imperative to use it wisely.

The Candidate's Job Description: Yes, You Get One, Too!

More frequently in these days of rising campaign costs, your time is dominated by fundraising. Your most important job will be phoning or sitting down, face-to-face with prospective contributors, and asking for money.

You are also responsible for determining your point of view on issues and controversial questions. It is true that you may prefer to seek informed advice in handling touchy questions or complex issues, however, you are 'where the buck stops' when it comes to making the final determination on the issues.

You are also the final authority on all hiring, firing, policy, strategy, issues, timeline, and interpretation of information. Although a good campaign manager seldom brings detail decisions to the candidate, you are the court of last resort in breaking stalemates within the campaign. Guidelines for determining what decisions should be brought to you and which decisions should be handled by the campaign manager need to be developed early. Generally speaking, you should be the chair of the board and the campaign manager should be the chief operating officer. Not every manager will have the kind of experience and self-confidence which will allow you to delegate all the important day-to-day decisions to her. And, not every manager will be able to wrestle some details away from you. The challenge is to build mutual respect and confidence between you and work towards the goal of dividing the responsibilities and tasks to the person most appropriate and best able to handle them.

You should review daily media releases, insuring that the comments attributed to you are accurate and contain your views on specific issues. You should respond to the press on those questions that involve issues. The campaign manager or communication director should respond to those questions that involve campaign points, such as contributions, strategy, endorsements, polls, and examples of campaign momentum.

Regarding paid media, you should have the final approval on all brochures, TV, radio, and newspaper ads. It is easier for a candidate to review the final copy of all the text that will be used **before** it heads to the printer or studio.

When it comes to the finances of a campaign, you should approve the budget and the process to monitor the budget, but you should not write the checks, authorize individual expenditures, or balance the books. The campaign needs to work efficiently and with a streamlined system of checks and balances. You have too much on your mind and in your actual job description to handle these kinds of details.

Other common tasks that you may be tempted to handle yourself include: working with the printer to determine color, type styles, layout, and the other printing details; putting up yard signs (usually after you have gotten frustrated after seeing other opponents' yard signs spring up all over town); opening the mail to see from whom the donations are coming; solving every personnel problem that arises (after all, these volunteers are giving up valuable time for you ... shouldn't you be there to take care of the problems?); and calling key workers to check on the details of an upcoming event.

Don't do it! Hang in there, and let the system work. A frequent criticism of women candidates is that they handle too many of the trivial details, thus suggesting to some that they may do the same if elected. A candidate who handles minutia in a campaign will often be perceived as a person unable to see the big picture as an elected official.

So, as frustrating as it might be to watch some details slide by, it is important to get the campaign working according to a set of procedures where each person is dedicated to most

efficient and productive use of her time. There is not enough time for you to do all you should do in order to win, so don't add those tasks that others need to do.

Spend the time necessary to find the right manager and staff; set up the process for an efficient chain of command; and delegate the tasks to those best able to do them.

The Campaign Manager

It is often said that if the campaign is successful, it is the candidate who won the race; however, if the campaign fails, it is the campaign manager's fault. Campaign management is not a profession that guarantees happy endings. It seems that when a manager is associated with a winning campaign, she then takes the first job she can get with the winning candidate. If she loses, she vows to get out of the business "and get a real job."

The job of manager can be both a blessing and a curse. It's exciting; there is seldom a dull moment and no two hours, much less days, will be the same. The job requires every ounce of creativity, patience, energy and tact that a human being can muster. It is a true test of a person's management capabilities, people skills, consensus-building, technical campaign training from computers to campaign plans, targeted number crunching, time management, mediation skills, press relations, and a score of other talents which must be available at a moment's notice.

The best campaigns are not run by consensus; they are not run by a steering committee. They are not run by the candidate or her family. The best campaigns are benevolent dictatorships, and they are run by the campaign manager. Neither a glorified office manager nor an echo of the candidate, the manager is a strong leader, a compelling motivator, and a good communicator. She, above all else, is loyal to the candidate while being able to be a devil's advocate when the situation demands a reality check.

A manager must be able to conceptualize the strategy so it translates into a realistic day-to-day plan of action. The best managers intuitively know what to find out about people before assigning them tasks and projects. The manager then monitors the progress of all efforts, making valuable mid-course corrections or changing players when the results fall short of expectations.

Remembering that there is no one way to win (or lose) a campaign, the manager just has to find one of many ways to get the job done right. She should have proper training, either on-the-job training from an earlier campaign, or specific training from campaign professionals who can teach her the basics. A campaign manager who has run an incumbent's campaign is not necessarily a strong candidate for a challenger or an open seat race.

The campaign manager needs to be a quick study in trends, personalities, and issues. She needs to know what is news, what is boring to voters, and what is a possible bad headline in the making.

Managers are good examples for the rest of the team. She has to be a role model for enticing new volunteers to work on the campaign. She needs to be good-humored: fun people are fun to be around. She also should be the first one at work in the morning and the last to leave at night. She needs to watch for the seeds of discontent gathering in those workers who may be losing interest, and she needs to motivate others to handle work when they would prefer to be enjoying the sunshine. A campaign manager need not be a great public speaker, but it helps if she can hold her own with the local press and pinch hit for the candidate when the schedule requires an informed alter ego of the candidate to speak to a group.

Regarding management skills, the manager needs to be good at delegating projects and responsibilities. There is simply too much work for one person to handle all the quality control. It is often said that the best campaign manager doesn't compile a list of things to do each day--she realizes all the things she won't do. Determining the hundreds of details that should be done is not as important as figuring out which ones are less important and prioritizing the work that others should do.

The manager should be adept at cutting through all the details to get to the real core of problems, and thus be able to make quality decisions in a short amount of time. In many

campaigns, there simply isn't enough time to agonize over every decision. Responsibilities of a campaign manager include:

- **Establish the day-to-day priorities** of the campaign and assign the important projects to key workers
- **Keep the candidate informed** of the projects, incoming new volunteers, endorsements, changes in the strategy implementation and anticipated problems
- **Oversee the budget** and authorize expenditures
- Create the overall campaign policy and procedures for daily operation
- **Recruit, interview and hire** all the campaign staff in consultation with the candidate
- **Supervise all staff** and make changes, if necessary
- **Oversee the schedule** and make decisions as to the best uses of the candidate's time
- **Communicate with key leaders**--political, special interest group, union and others--including elected officials
- **Act as a surrogate** for the candidate in those meetings and forums where appropriate
- **Determine priorities** regarding valuable campaign resources
- **Determine the agenda** for staff and steering committee meetings
- **Work with the communications director** to determine media strategy and the timing of critical news releases
- **Advise the candidate on** issues and specific questions she is likely to be asked
- Project the cash flow and monitor fundraising efforts

How do you find a person capable of being all that a campaign manager should be? Traditionally, a search for a campaign manager is limited to the first prospect you can find. Too often a candidate, panicked that she is getting behind, will jump from one possibility to the next until she finds someone who finally agrees to serve as the campaign manager. An objective search that yields a list of qualified applicants will give you a chance to find the best manager for a specific candidate.

How to Find a Campaign Manager

Take a look at those **recent campaigns** where you were surprised at the results: where the campaign caught fire and built unexpected momentum. Find out who the manager and second and third in command were in those campaigns and call them.

Check out **non-profit associations and advocacy groups** which rely upon scores of volunteers to accomplish their mission. See who the leaders are and see if any are ready for a political campaign.

Seek out the **staff members of elected officials** who have smooth operations and good constituency networks. See if there is a junior staff member ready to take on a campaign mission.

Talk with local **political consultants** and see whom they recommend. Find out who has attended recent training sessions of your state party: someone who has been learning about the business may be ready for a first-hand experience.

Ask local **political reporters** about the rising stars in the business. Who are the political technicians and the press talking about and why? Perhaps the name of someone will surface who was an unsung hero from an earlier campaign.

When you survey the list of political people with experience, don't forget to take a look at the **losing campaigns**. In a great many cases (particularly in challenger campaigns), too many obstacles were present for an otherwise good campaign to win. However, the manager might have been great.

Locate people who have been out of the political limelight for the past several years. These **former campaign political people** may have taken their breather from the pressure cooker world of campaigns and want to get back into electoral politics. Particularly look for women who have taken a break from their careers to spend time at home with young children. Perhaps they are ready to begin working out of the home again.

Look for the **political newcomers**. In the list of new members to the National Women's Political Caucus, National Organization for Women, local Democratic, Republican, and other parties, there are people who have probably worked in key capacities for campaigns outside the area. Although every local electoral district organization will maintain its theme: "we do things differently here in this district", basically good campaigns are the same all over the country. Though campaign professionals will readily admit there are important local interest groups, issues, endorsements, and rules; over half the standards for a good campaign are the same no matter whether the campaign is in Muskogee or Tallahassee.

Review a list of **prominent and influential people** in town in those organizations to which you belong. Perhaps there is someone within those groups who could leave her current one and work on the campaign.

Party activists are good references for other party people who are managers. Beware of those party activists who seem to be in the know, but not necessarily a hands-on manager. Because a person attends every event, it does not mean that same person could organize even one event.

Two words of caution: first, just as there is no perfect candidate, there is no perfect campaign manager. The demands of this workaholic job and the inadequate pay that the manager usually gets will require some compromise.

Secondly, a great campaign manager for one candidate may be a disaster for another one. Understand that you will need to form a strong partnership, and while it is not necessary that the manager and you be close friends, you should at least have a strong respect for each other as people. The campaign manager should be as loyal to you as you are loyal to the manager.

Studies have shown that the campaign that needs to change its manager midstream is least likely to win. You need to devote serious time for building a relationship early in the campaign. The personalities have to work in sync or the rest of the organization will suffer.

Some women candidates have worried about the community perception of hiring a woman to be the campaign manager. This is the same kind of bogus, chauvinist philosophy that has kept many capable women from excelling in every other field. Look for the most experienced person you can find to handle the management responsibilities; gender, age and other characteristics become less relevant to consider. In most cases, there will be few truly qualified people from which you will have to choose. Be happy you have the choice and make the best match you can.

The Treasurer

There is only one person in the campaign whose mistakes can result in serious fines, bad headlines, or possible jail time: the treasurer. This is the person who needs to understand the campaign rules and regulations, whose honesty is above reproach and in whom everyone has faith and confidence. She needs to be someone who has been involved in handling money in the past, preferably handling a campaign similar in size, complexity, and under the same restrictions. If you cannot find someone with previous experience, then you need to find a meticulous and totally dependable person to handle these reporting functions.

How you handle contributions is a very sticky business. You don't want to have to worry about it. To insure this, take as much time as you need to find the treasurer. A certified public accountant or an attorney who has had this kind of detailed assignment in the past may work well.

The treasurer is usually someone who has a full-time job and who works on the campaign books at night and on weekends. Traditionally, a good treasurer oversees the process for accepting checks and cash contributions. She is trained at the beginning, and must be constantly

updated on the changing rules and regulations. She will then create a written set of guidelines for campaign staffers and Finance Committee members to follow. An office procedure needs to be established for handling all checks and getting them to the treasurer. She may want the checks copied at the office so a record is kept for each contributor. Then, as the money is deposited in the bank, it must also be recorded on an official tally sheet, hopefully located in a database which can update contributor information as well as serve as the official reporting system for state, local, and federal campaign regulatory agencies. Most federal, state, and local laws have detailed disclosure requirements concerning contributions and expenditures that should be researched through either the Federal Disclosure Commission for Federal races or the Secretary of State or local auditor for state races.

The treasurer insures that the reporting deadlines are placed on the master campaign calendar in the event that reports require additional time and staff support. In more and more campaigns, the treasurer also pays all the bills after each is approved by the manager. The treasurer can then serve as a cash flow balance between the operating needs of the staff and the incoming fundraising. In some campaigns, the treasurer will monitor the budget with the actual daily expenditures. Should a budget deficit be imminent, the treasurer can alert all the team members.

It helps to have the treasurer sit on the Finance, and/or the Steering Committee. The treasurer becomes the reality check on all money incoming, outgoing, and budgeted. She can also see the spending trends sooner and more objectively than the other staff members.

Office Manager

In the early days of the campaign, there are hundreds of little details to handle but not nearly enough volunteers to do even the most important of tasks. An office manager is the next position to consider hiring.

An office manager is in charge of supplies, helps to find the campaign headquarters and puts it together, establishes the office policies and procedures, and then makes everything work. In many ways, the campaign's office manager is very similar to any office manager of a small business. This person needs to insure the phones are answered (the same way each time it rings), the inventory is accounted for, the supplies are ordered before they are needed, the headquarters office is organized to produce the work that needs to be done, and the volunteers are accommodated as soon as they walk in the door.

Of all people on the staff, the office manager has got to be a consummate detail person. Keeping the names, telephone numbers, and addresses of all the important people and suppliers, the manager knows where everything is stored (or hidden) and can smile in the face of any stressful adversity. This queen of patience and tact should also be able to come to the manager to establish and clarify the day-to-day priorities. She then controls the equipment and supplies accordingly. Individuals competing for limited resources know they turn to the office manager to find out where they fit in the copy machine waiting line.

The office manager may end up working day and night in the campaign office, but her hours should certainly include the traditional 8 a.m. to 5 p.m. during the regular work week. In addition to keeping the master phone list, she should also know where the key staff members can be found at all times and insist that staff members sign out when they leave the office so important messages can be forwarded immediately. Other key responsibilities for the office manager include:

- Maintaining all the files in logical order
- Handling the communication with key vendors such as the printer and post-office
- Working with the volunteer coordinator
- Maintaining the invoices so each bill forwarded to the treasurer has been verified for accuracy

Look within your list of supporters to see if there is a person who fits this description. If not, this is one person who will truly be worth her weight in gold, so do not be afraid to allocate a little from the budget for this critical position.

The Computer Manager/Web-master

In this evolving world of campaign management, a new team of players has emerged on the scene often as important as the manager: the computer guru. In fact, good campaigns now have three or four major computer services built into the strategy:

- Database management (people, press, donors, voters, strategic team)
- Scheduling
- Volunteer management
- Web page construction & updating
- Targeting
- Voter Contact (reaching voters online)

How you arrange your campaign computer capacity depends on the experience and willingness of your computer-talented core. More campaigns select computer programs way over their heads, and often need simple computer task management. Just the ability to input the lists and lists of names so the name and address can be retrieved in the future is a stumbling point for some campaigns. The days of collecting written lists or names on index cards are long over--yet you would be surprised at the campaigns which have to avert to the old practices because their fancy computer program can't easily spit out the names.

Computers are expensive, but it is imperative that you find the person who will manage your functions before you purchase or accept donations of equipment. Campaign professionals now say that campaigns should dedicate between 10 to 20 percent of their entire campaign budget to the people, equipment, software, and expenses stemming from advanced campaign technologies.

The Rest of the Team

While there are other key players on the campaign team whose roles will be defined in later chapters, a campaign team should include:

- **The communications director** will be responsible for maintaining relations with the working press. She will handle the press releases, oversee the opposition research, coordinate the issue research, help work on debate preparation, write some speeches, arrange media events, and watch for press opportunities.
- **The scheduler** will handle the master calendar for the candidate, accept or decline invitations, handle the advance functions, trigger the set up of the "rah-rah" efforts (where you want lots of sign waving to accompany the candidate, such as a parade), and actively seek out invitations for the candidate to speak at functions.
- **The field coordinator** works with constituency groups, volunteers, and district party organizations to arrange the door-to-door canvassing, phone banks and direct mail that will produce supporters the campaign can use to build the organization or get out to vote on Election Day.
- **The volunteer coordinator** personally calls all the new volunteers in the campaign to welcome them and to help determine what roles each would best accomplish. She also maintains the central file of all volunteers and supplies the people resources for the projects that occur throughout the campaign.
- **The fundraiser** devises how the money will be raised to meet the budget. She helps schedule events, finds people to host private home fundraisers, develops a list for the candidate to phone for donations, solicits money from political action committees, and develops the direct mail fundraising plans.

Not every campaign will have the luxury of assigning one person, much less a full-time person, to each function. However, it is important that these roles be covered as completely as possible. In small campaigns, the scheduler and office functions may be combined, the field and volunteer coordinator are often combined, and in still other campaigns, the manager and the fundraiser are folded into one job description. It helps if a campaign can have one person--an energetic volunteer who can give a few evenings a week and a weekend day--helping to focus on each of these critical positions.

Campaign Committees

The old rule in campaigns is that the candidate gets to be the boss, even though everyone will agree that the candidate is the person least likely to be objective about problems, especially during stressful times. Our democratic election model has evolved to include an ever-increasing series of committees that have varying degrees of control and responsibilities during a campaign. No committee should make final decisions or call shots your professional staff are paid and trained to handle. If you make this clear from the start, less time will be spent reigning in committees and more time spent getting them focused on the work of the campaign.

Committees are traditionally a group of prestigious individuals whom you want on your side, actively working for you and giving you important feedback on the campaign. No one committee is imperative for any campaign and many variations are possible. Any committee is time-consuming and too many can become uncontrollable and a waste of time. Each committee you consider should have a defined role, a regular meeting time, and a clear understanding of where they fit into the campaign organization. Time spent organizing your committees is critical. Make sure the composition is representative of your constituency and add people who are likely to be devil's advocates as well as those who are blindly supportive. When you meet new supporters, particularly important representatives of special interest groups, don't immediately try and get them to join a committee. Determine what they might add and ask about some of the current members before you make the offer. Some committees should always be increasing in numbers, while others require a stable group in order to do their job.

The Steering Committee

Meeting usually once a month, this group includes community leaders, constituency representatives, longtime mentors and friends, former or current elected officials, the chair of the Finance Committee, and key campaign staff members. You usually attend most of these meetings, however, some good feedback might occur at meetings when you're not present.

The purpose of the Steering Committee is to gauge how you're doing and to monitor how the strategy is working. Agendas for committee meetings should be written, and a secretary of the group should be appointed to call members about meetings and to follow up on suggestions made by the group. Steering committees do not run campaigns; they are information advisors and idea generators. The members are your trusted guides through the confusing and hectic times of a campaign, but they do not speak for the campaign unless directed to do so. Committee members should attend all the major functions of the campaign (at low turnout fundraisers, these loyalists always help make the room look full).

Some Steering Committees like to have full reports of everything that is going on in the campaign, while others just respond to the agenda prepared by the candidate and campaign manager. Each meeting is a good opportunity to list those campaign supplies still needed but you don't want to buy. Important chores and critical phone calls to community leaders should be assigned as well. It is important to let the members talk about the strategy and tell the candidate about creative options available. Steering Committees often add valuable insights on opponents' campaigns and should always act as energetic rallies for campaign staff members and the candidate. You know you're missing the boat if these meetings become draining sessions or rambling reviews by the staff.

The Campaign Headquarters

As soon as the campaign manager is aboard, the search begins for a good headquarters. In the early stage of a campaign, the best headquarters are usually those you pay the least amount of money to get. If possible, get your campaign headquarters donated. However, the best campaign headquarters in the more critical late stages of the campaign are those that have the room to allow people to accomplish a variety of projects at the same time.

Versatility is important. Look for buildings that have been used as campaign headquarters by other campaigns in the past, or seek out small warehouse space that has lots of open areas for staging mass mailings, rallies, and possible phone banks.

Watch for small businesses that have recently moved or gone out of business. Talk with realtors about available space that has not rented in awhile and offer to seek a month-to-month lease that allows you to lease better space before the campaign is over if needed.

What to look for in a Headquarters:

- **Access to volunteers.** Look for a location that has adequate parking and access for disabled persons. The location should be close to a main bus route and within easy walking distance to inexpensive restaurants, newspaper stands, and a grocery store. Extra points go to a location close to your printer, the candidate's professional office, or a local university (where it is easy for campus students to adopt a campaign).
- **Room to grow.** A space that is initially too big is not as serious a problem as one that is too small in the waning days of the campaign. In an ideal world, you would want a large warehouse space with several small, individual offices. The large space should lend itself to mailing parties, constructing yard signs, holding rallies for volunteers, and assembling large numbers of packets.
- **Visibility.** A location that is in the center of town or right off the main interstate may afford you valuable free publicity, particularly if the landlord allows you to place a huge sign either on the building or in the front windows.
- **Utilities.** The telephone system and electricity you will need in a campaign is not the same as in a traditional business operation. Lights need to be bright and provide the headquarters with enough light to make data entry easy. Check the electrical capacity to insure it will handle your computer demands. It helps to have enough capacity so a circuit isn't blown when the first TV cameras are plugged into your electrical outlets.
- **The telephone system** is always a dilemma. In many campaigns today, cell phone have replaced the need for such expensive systems. As the telephone companies still require overly steep down payments from campaigns (they fear campaigns will leave them with large bills), enterprising managers are going all cell phone. Seldom can a campaign afford a state-of-the-art system. When choosing a campaign headquarters site, at least look for a location that has had inexpensive phones installed in the past. Find the telephone jacks already in the building and see if a system comes with the building.
- **Location.** You will have people working all hours of the day and night. Make sure the headquarters location you choose is in a part of town where they will feel comfortable working. Dingy headquarters in a seedy part of town will limit your growing staff. Make sure the parking lot is well lit and that people are not in danger of assault if they choose to work late. Check out noise and other distractions associated with a location. Being across the street from an X-rated theater or next door to a new construction project that will sound like a battle zone are no bargains even if the location is rent free. Janitorial service is usually nonexistent in many of the buildings you will consider. Insure that there is a city or private garbage service that will accommodate the tremendous piles of trash that will be generated. Don't forget to ask if there are recycling programs in the neighborhood in which you can participate.
- **Insurance.** Contents, theft, fire insurance, and even liability insurance will be necessary in some buildings as a prerequisite for renting. Check with local insurance vendors to get

a policy which will cover your computers, borrowed computers, the office furniture, and other hardware in the campaign. Keep important computer files backed-up and in a fireproof safety deposit box or in a safe place out of the office. An insurance policy can cost up to \$500 per year, but it's well worth the cost, depending on how large your campaign becomes.

Office Rules And Regulations

Once the office is open for business, a simple set of policy guidelines should be instituted by the office manager. These rules and regulations should be posted in the headquarters and should be given to each person as they join the staff or volunteer. These rules should include:

- **Standard hours of office operations** during the week and on weekends (traditionally 8 a.m. to 9 p.m. during the week; 9 a.m. to 6 p.m. on Saturdays and noon to 5 p.m. on Sundays).
- **Duties of everyone opening up and closing** the office. The first person to arrive needs to pick up the newspaper, get the messages off the recording machine, turn on the lights, make the coffee, and unlock the other doors. The last person out needs to turn off the copy machine and coffee machine, turn on the answering machine, shut the windows, turn off the lights, make sure the fax machine is on, check the computers to make sure they are set as they are supposed to be, take out the trash, and lock all the doors.
- **Management of the supplies.** Add instructions to the office procedures that outline who can take what supplies and whom should be notified if certain supplies are being depleted. All supplies should be apportioned according to the priorities set by the office manager. Inventory sheets should be maintained so the manager always knows how many of the campaign buttons, brochures, flyers, yard signs, and other campaign gizmos are on hand.
- **Signing in and out.** It is imperative that the front desk receptionist knows who is in the office and who has stepped out. A front sign-in board is probably the most important detail for the receptionist desk. All key players need to understand the importance of letting the receptionist know where they are and when they will be back.
- **Requests for using meeting rooms** or open space in the office should be coordinated through the office manager so meetings and projects can run smoothly without interference.
- **Parking for volunteers** and staff members is an important detail that traditionally causes grief and aggravation in each office, particularly since most campaigns seldom have enough free parking places for all the workers. The plan for parking should be determined in the office policies, even if the policy is first-come, first-served. Allot a specific space for the candidate since she can least afford the time and trouble to look for a parking space.
- **Cleaning and trash pick-up.** Set out the rules for cleaning the kitchen and keeping the place looking clean. Everyone should be responsible for their own trash. Post signs indicating when trash pickup occurs.
- **Smoking.** Most campaigns correctly restrict all smoking from the building, but you may want to designate a location where smoking is allowed. Make sure you include a fire extinguisher in the building.
- **Drinking and drugs.** Clarify: no drinking and no drugs will be tolerated in the office, unless you arrange for a late night, organized relaxation that includes beer or wine. Hard liquor stays out of the office and no alcohol should be in the office while underage workers are there.
- **First aid kits and other health supplies** need to be on hand for emergencies and the classic campaign headaches. Simple aspirins and Band-Aids are important but also

thermometers and a healthy supply of vitamin C should be stocked. The policy for handling injuries should be discussed in a staff meeting and not necessarily in writing.

- **How to answer the phone and take messages** should also be in the policy manual. If you don't clarify the correct way the phone should be answered, you are destined to have a hundred different interpretations. Also, each receptionist should be trained how to answer the phone courteously, transfer a call and find the campaign manager or communications director for important calls.
- **Schedule requests** should immediately be referred to the scheduler with appropriate forms sent out to those requesting appearances by the candidate. No one should accept, even tentatively accept, an engagement on behalf of the campaign unless the scheduler has been informed.
- **Campaign expenditures.** No campaign expenditures should be made unless approved by the campaign manager or office manager. All requests for purchasing supplies or services should be made well in advance of the date they are needed.
- **Dealing with the press.** No member of the staff will talk with the press unless the communications director has cleared the comment. If a reporter calls, the communication director should get the call. If she is not there, the campaign manager should take the call. If the manager is not there, then a message should be taken and the receptionist should attempt to reach the manager or communications director as soon as possible.
- **The procedures for accepting a contribution** need to be spelled out in the policy and understood by everyone. In some cases, the checks need to go immediately to the treasurer. In other cases, they go to the manager, and in still other cases, the checks go to one central location where they are handled by someone else who records the checks and deposits them in the bank.
- **Reimbursement procedures** need to be clear, with an appropriate expense form attached to the back of the policy. If you are authorizing travel, phone calls, day care or meal reimbursements, clearly define the reimbursement guidelines for each situation.
- **Copies of all mailings,** campaign-produced literature, questionnaires, flyers and invitations should be kept in the central filing system. If items are removed from the central files, the office manager should be notified.
- **Staff meetings.** Who should attend and when they are to be held should also be addressed in your policy and procedures.

There are many other items that may be included in the office policy and procedures. Remember, these are your internal rules for how the key people will work together. Include as much as you need to keep things orderly and organized and to insure that your volunteers and staff members know this is a serious business.

Selecting the right campaign headquarters and getting the rules, job descriptions, and line of authority clarified early will improve the operation and output of your campaign effort.

Chapter 6

Research, Polling & Focus Groups

There are many ways to beat your opponent: the smartest way is to know more than he knows about the voters--and what they think. When you build a strategic plan that is based on the many truths of your district and its voters, it is a campaign likely to be more successful. Three of the most basic elements of your research can be objective information you find at the very start of the strategic process:

- **Basic research:** the collection of maps, voter file data, district demographics, historical profiles of the change within the district, and anything else that gives you an in-depth look at the voters. In addition, you will want to search for anything you can find legally about your opponent from public documents and the internet, especially with search engines like Google. The information on your opponent's record is needed before you poll as you will want to know what shortcomings resonate with the voters;
- **Focus groups:** the coming together of a dozen or so randomly-selected voters who will sit down with a facilitator and talk for an hour and a half (usually with a two-way mirror so consultants can watch true reactions) about the issues, candidates, style, negatives, experience and approaches of the candidates they face;
- **Polling:** an extensive survey of more than five hundred randomly-selected voters who are usually phoned and asked their opinions on the issues, candidates, negatives, style, programs, and endorsements of the candidates.

If these three areas are well planned and well developed your campaign will have a strong basis from which to build.

Basic Research

A basic research program starts with four major areas of study:

- A demographic analysis of your voters
- An assessment of the issues
- A historical and geographic profile of the district
- An evaluation of your opponent

Well-organized research methods have become essential to every facet of a competitive campaign. Research will enable you to make proper decisions along the campaign trail by assisting you in determining your goals, identifying your assets, monitoring your opposition, defining your targets, and honing your message. In other words, a good research program will help you allocate your four major campaign resources: time, people, money and talent. With this fundamental tool, your campaign will be able to minimize the stumbles along the trail to Election Day. In terms of maintaining the sanity of any campaign manager, research helps provide the guideposts against which decision-making can be measured.

Researching The Electorate

Just like a candidate who has a profile, the people who compose the frequent voters in your district also have one. From city, county and state government offices, you can get computer readouts, called reports, on how your district's voters have responded to past candidates. Review how past candidates in your party have fared in previous elections. In addition, compare the specifics of your election year with past years to see how many voters you can expect at the polls. For example, if you are on the same ballot as the presidential election, you can expect a substantially higher number of voters compared to non-presidential year elections. If, however,

you are in a special election or a primary with little else on the ballot, you can expect less than half the number of potential voters to go to the polls for your election.

Find out what else is likely to be on the ballot --from other races, bond issues, school levies, to possible initiatives. Refer to earlier elections where similar activity was on the ballot. From there, you can begin to construct a picture of the potential voter turnout in your own election.

Once you see what the voter history has been, take a closer look at the voters. Previous candidates, government planning agencies, local political parties and public research or non-profit groups may have precinct-by-precinct breakdowns of the following voter information:

- Ethnicity
- Age range
- Income brackets
- Whether the residents are homeowners or renters
- Education levels
- Occupation information

Local vendors who sell voter lists and labels to groups and campaigns will have public information that they can give to campaigns in order to entice them into purchasing lists at a later date. Determine what free information you can obtain in printed form.

Look at the most recent census reports. Your district may show that senior citizens are leaving the area, or that two parent families are on the decline in favor of single heads of households. All these clues about who is actually living in the precincts become critical as you design your strategy for connecting with those voters. The new trends in campaigning require knowing as much about your voters as they will know about you. If you take the time to research their voting trends, demographics and even their lifestyles, you have a better chance of communicating on issues they care about.

Targeting the most frequent voters is getting more sophisticated. Because of the volume of “junk mail” out there selling cell phones to pizzas, campaigns are now “micro-targeting” smaller subsets of the overall population, based on more specific information we can develop about our voters. For example, instead of mailing a brochure providing a general overview of your experience and generic goals to fifty thousand voters in the district, you may send a five thousand piece mailing regarding crime to senior women; another five thousand piece about day care to single parents; a fifteen thousand piece about transportation to homeowners in an area impacted by new road construction; a ten thousand piece mailing about reproductive choice, equal pay and economic opportunity to women under 40; and a fifteen thousand piece mailing about fiscal controls needed in government to men. As you learn more about the voters, you are better able to find those lifestyle similarities and those messages you have in common.

Get the vital statistics that will be important to you. Obtain information regarding the unemployment rate; the number of children in public and private schools; the total city, county and state budgets; the religious composition; the landmarks; the history, and other valuable pieces of information that can give the voters a good feeling that you really know and care about the district. Keep these facts close at hand and constantly add little known facts about the district to your notes. Voters enjoy a candidate who tells them new information about their community.

Research on Your Opposition

You need to be well aware of your opponent’s strengths and weaknesses. Start by collecting all the press clips that have ever been written about your opponent. Find past brochures and any material he or she has authored. Check to see what public service councils or boards they have served on and what recommendations they submitted. Have someone slightly removed from the inner circle of the campaign handle this research to increase the chances of gathering objective information.

Do the same kind of in-depth pro and con assessment of your opponent that you did for yourself. Get a copy of their recent résumé. It is very important to set up the contrasts between you and your opponent, but do not create differences that are not there. If that person has held public office in the past, find out from others about their performance. If that board, commission or council tackled problems in ways that opposed the community's perception of a solution, document the situation and ask others how the problem might have been handled more effectively.

Again, your job is to contrast the contenders for this post ... to make it easy for people to see the differences that separate candidates. Typically, this includes years of public service or kinds of work experience. It can include years living in the district, and the number of times you voted versus the frequent voting lapses of your opponent. More often, candidates compare many areas of difference:

My Candidacy Offers You

Eighteen years in public service
A perfect voting record
Major labor union endorsements
Never been sued
Never been arrested

My Opponent's Record

No public service
Only voted three times in four years
No major labor endorsements
Been sued five times
Arrested for misdemeanor offence

If there are candidates who have run against your opponent in previous campaigns, talk to them or their campaign managers. Also, the legislative caucuses may provide information on how the incumbent voted in the past, along with perhaps some polling data. There are always old files of opposition research that can save you precious time in starting your own.

Find out about the campaign your opponent ran in the past and what kind of endorsements and contributors they had. The public offices commission or other state/federal/local election regulatory commissions will have these lists. Get copies of them and learn how some of those prior supporters now feel about your opponent.

Most important, find out what you can about them on the Internet. There are a hundred different ways to find public information online, from stories in the media that mention your opponent to facts about their résumé (See Chapter 9).

Focus Groups

One technique growing in popularity in many campaigns is that of focus group research. Focus groups really do not serve as a substitute for survey research, but can help amplify survey findings or provide qualitative data. This is extremely helpful in assessing the rhetoric voter's use in describing various candidates and the issues and how they respond to various messages that each campaign may employ.

A focus group is eight to twelve voters gathered together informally in a discussion type atmosphere. Typically, a moderator will serve as discussion leader and follow a pre-determined agenda designed to assess a variety of attitudes and opinions the electorate holds. These can be aimed at one sole topic - abortion, auto insurance reform, the environment, day care, taxes, etc. or probing perceptions of two candidates in a campaign and the issues the electorate would be concerned about during the course of the campaign.

Focus groups can also be utilized to better understand how one demographic group is behaving. For example: a focus group session with men and women over 50 years of age discussing health care costs; a session with men under 40 years of age on their acceptance or resistance to a female candidacy; or a session with parents who have children living at home discussing the quality of public education in their area.

Like any professionally conducted focus group, it is important that for campaign related focus groups you recruit individuals who are not intimately involved with the nuances of the

campaign. As much as possible, you are attempting to recruit a representative sampling of individuals the campaign will ultimately target in determining your campaign strategy.

Focus groups are now used to determine what radio and TV ads are effective for the candidate, and to gauge if the audience gets the same message the consultants are aiming to get with its showing. The sessions are recorded so others not there (often the campaign staff and candidate) can review them later on. Some candidates also have taken audio versions of the focus groups to play in the car en route to events to remind them of what the people really want to hear addressed.

Polling

Research for a winning campaign cannot be done in a "shot gun" manner. It must begin at the very outset of your campaign. Introductory research should be conducted in order to determine the goals and objectives for your campaign in terms of long-range planning. This preliminary research also serves as a basis for other elements of your campaign, such as scheduling, communications, and fundraising. Continual updating of the research will provide you with the necessary current information as situations change or new ones occur.

Survey research is an expensive undertaking in any campaign. As a general rule of thumb roughly 8 to 10 percent of a campaign's resources should be allocated to the research process. Running a campaign in the new millennium is like guiding a business venture-you need access to all the tools to survive and be successful. Before you shortchange your campaign on the research end, ask yourself this -what is my opponent doing right now? Do they have access to the information I am thinking of acquiring? Increasingly, the answer is yes. If your opposition is taking advantage of modern campaign technology can you afford not to?

Research should be done to confirm assumptions, test basic campaign themes, develop strategy, serve as a timeline to measure the achievement of objectives, and at times to assist in fund-raising efforts to bolster credibility.

With competitive races on the statewide and congressional level, it is not at all unusual to discover that approximately 40 percent of the electorate is making its decision in the last three weeks of the campaign. Therefore, it is imperative that today's campaigns have access to data during this critical time period that allows them to assess the playback of the campaign's message, the solidification of their coalition and the perceptions that the electorate holds of both candidates.

It is imperative that you allow for the flexibility of conducting a poll within that last three-week time period to understand the stimuli driving decision-making.

Selecting a Pollster

The political environment within the polling community across both Republican and Democratic circles has become much more competitive in recent years. That is excellent news for campaigns and certainly requires that the various polling entities be attentive to their clients.

There is a basic checklist that should be administered prior to making your decision on whom to hire as a pollster. However, given the competitive arena we now function in the differences between polling firms are less apparent. In many cases what the decision ultimately comes down to is the chemistry between the pollster, the candidate, the manager, the media firm, and the strategy team. Campaigns are becoming more integrated in linking polling, media and strategy throughout the entire campaign.

Therefore, the selection of a pollster is also a function of the entire campaign team that you are putting in place. Assuming the only consultant the campaign is hiring is the pollster, here are a range of questions that should be considered:

Background and experience of the polling firm. Do they specialize in a certain region of the country? Do they poll only for liberal or conservative candidates? How many winning challenging campaigns have they been involved in? What is the range of races (local, state,

regional or national) that they have been involved in? It is also helpful to find out what candidates they have worked for in the past.

Type of polling work performed. There are political polling firms, public affairs polling firms, market research firms and telemarketing firms. All claim expertise in various phases of the polling process.

- The implementation of a political questionnaire, which could take anywhere from 5 minutes to 30 minutes to implement over the telephone is far different from a 45 second telemarketing call. While there are many local market research firms with survey research expertise, the question becomes whether they understand the nuances of political research, the campaign dynamic and the integration of polling interpretation to strategic development. That should be why you are hiring a pollster. Don't shortchange your campaign's efforts by hiring somebody who does not understand the difference between the two.
- In politics your marketplace is one predefined date where you need to capture 50 percent plus one of those who turnout and vote on that particular day. Increasing your market share from 30 to 45 percent would be a terrific gain for a new product but still represents a failing margin in politics. The difference between the two is extreme.

Campaign insights. What is their initial approach and strategy they see being applicable to this particular race? What hypothesis would they like to see confirmed in the poll? Have they dealt with any similar campaigns in the past?

Area of expertise of that firm. Are they perceived as a national polling firm, with a wide range of experience and access to all types of data? Are they located in a certain region of the country but are uncomfortable going beyond those parameters? Are they involved only in statewide campaigns? Do they have experience in local election contests such as mayor, county commissioner or state legislator? Are they familiar with the problems and opportunities confronting female candidates? Have they polled previously in races either for or against a female running for office? What lessons were learned by this experience?

What is in the data package? Is the client provided with an aggregate questionnaire, cross-tabs, analysis and presentation? What is the data format? Is the campaign manager comfortable reading the data?

What is the turnaround time? Once the manager has authorized the poll to be commissioned, how much time will elapse between questionnaire design and actual presentation of the results? What kind of reporting process is in place during this period to keep the client apprised of progress?

Does any potential exist for conflict of interest? Who are other candidates, clients or issues that the firm is working for during your election cycle in your region?

What is the in-house capacity of the polling firm? Do they have a consistent core of interviewers? Is the data run in-house for greater quality control? What kind of sampling and weighting decisions are made? Who is the account representative for the firm? Will they allow you to use volunteer phone callers? Will they help train them?

Who prepares the poll? Is it prepared by the lead consultant? What involvement does the campaign have in the process?

Going Beyond The Horse Race Numbers

Too often campaigns and the media become fixated on the numbers reflecting the latest positioning of each candidate. In other words, they tend to look at one question - "If the election were held today, would you be voting for candidate A or candidate B?"--just like a horse race

contest. While obviously this is one measurement of the success or failure of the campaign, it is just that -one measurement. Frankly, early on in a campaign is the least meaningful number to examine. The purpose of conducting survey research is to guide decision-making and resource allocation so the campaign is in a position to win on Election Day. You must assess a wide range of measurements to glimpse the political environment confronting your candidacy.

Let's suppose that you are a candidate running for state senate as a Republican, up against a senior male Democratic incumbent. The Democrats control the state assembly and the incumbent Republican Governor is up for re-election. Voters are concerned about drugs, taxes, quality of education and the environment. The Republican candidate is an administrator with a health care company running against the incumbent who is an attorney. The Democrat candidate's law firm represents an auto insurance company and currently the state legislature is wrapped up in a bitter controversy on auto insurance rates and insurance reform.

Under this scenario, it is likely that the "horse race" contest when tested may show the Democrat winning by a margin of 52 percent for and 12 percent against, with the remainder undecided. That measurement by itself confirms that your candidate is behind. The question becomes how do you change that dynamic and what else does the survey information provide that would alter that equation? How would you approach analyzing the initial survey results?

The Art of Interpreting Data

Under the scenario described previously, begin analyzing the data in this fashion:

Is there a partisan agenda that dominates the landscape? What do voters perceive the top priority of the state legislature to be? What is the popularity of the incumbent Republican Governor? This will help determine whether to seek an endorsement from the Governor. What is the popularity of the state legislature?

Is there any sentiment to change party control of the state assembly? Indeed, are voters even aware that Democrats currently control that body? What is the most important local issue?

What are the key issues? Do voters favor or oppose additional taxes if allocated to improving public education? Do they favor or oppose a lottery with those revenues earmarked to educational improvements? To what extent are voters willing to take specific action on fighting the drug problem? Will they allow random drug testing of high school students? How about suspending someone's driver's licenses if caught using drugs or drinking while driving? What is their opinion on the death penalty?

Determination of incumbent vulnerabilities. What is the job approval rating of the incumbent? Can voters provide specific mentions of any legislative accomplishments? What is the "time for a change sentiment"? What is the general awareness of the incumbent and his favorable/ unfavorable ratio? What hesitations do voters offer in terms of voting for the incumbent again? Is there any concern that the incumbent has a conflict of interest? If voters could make one specific suggestion to the incumbent as to how he could do his job better, what would they recommend?

Defining the challenger's campaign. What is the initial awareness of the Republican challenger and her favorable/unfavorable ratio? Given the fact that she is female and comes from the health care community, is she receiving any extra budge with traditional Democrat coalitions that a Republican candidate would not otherwise expect? Are there any negatives particular to a female candidacy? How well is she doing within the Republican base? If the Democrat is still winning with Republicans, is that simply due to a name identification advantage or is there another problem confronting the Republican challenger within GOP ranks? What is the intensity of her support?

Determining the coalitions. What coalition is unique to each candidate? Is there one voter bloc that each campaign will be targeting? Will that become the mutual battleground in the

campaign? Due to the background of the Republican challenger and the seniority of the Democrat incumbent, can a non-traditional GOP coalition be forged that will allow your campaign to succeed?

Goals to be achieved by next survey date. Assuming that the campaign has the resources to conduct more than one survey during the course of the campaign, it is a highly practical matter to define certain goals that the campaign will try to achieve to measure the progress of the campaign.

Timing Of Your Poll

There is no perfect time to poll. More than anything else you are constantly looking through the eyes of the electorate to detect what is on their mind and how they are viewing the dynamic behind your campaign.

In terms of timing considerations, you need to assess the impact of other events on the political calendar, such as candidate filing deadlines, primary dates, the closing of the legislative session, when your opponent might be conducting their own advertising blitz or when a key speaker may be coming in on your behalf. Ideally, you want to poll when outside events will have very little to do with impacting the results within your district - otherwise your information may be biased towards people reacting to that individual event rather than the dynamics of the individual candidacy.

At a minimum, you would ideally conduct the initial benchmark poll for a state legislative candidacy six months in advance of Election Day. Resources permitting, you would then schedule one other poll to be taken the last month of the campaign. This way you have a trend comparison against the first survey. You can measure the strength of your coalition and the intensity of your vote, and assess what messages the electorate is playing back in terms of what they are hearing about the two campaigns. All this will be of assistance in crafting your strategy.

The Bottom Line

The bottom line in political research is to understand how the electorate is visualizing your campaign. What stimuli are they reacting to? What perceptions have they obtained of the two candidates? What messages do they associate with each? What is their vote intention?

Polling, when done correctly, can help craft a winning campaign strategy. However, polling done improperly or without adequate resources to take advantage of your findings is a waste of your hard-earned money.

In-House Polling

Polling can be done in-house, which is to say it is possible to set up a polling operation within your campaign that will allow you to gather data as opposed to paying a survey research firm to conduct a poll on behalf of your campaign. But, before taking this plunge, you should carefully evaluate four criteria:

Can you acquire a sample list of voters to be contacted that are a part of your target population, and can you insure the sample is an accurate one?

Do you have access to interviewers who are capable of conducting unbiased interviews?

Do you have a supervisor who can carefully monitor the training and interviewing process?

Do you have the capability of tightly controlling the access to information about your poll? Do you have the resources to program the data and run cross-tabulations of some sort that will actually assist in evaluating the progress of the campaign?

If the answers to any of these questions are no, you should think twice before undertaking the challenge to set up your own in-house polling operation. But, if you can carefully monitor the quality control of your in-house poll, you might have an opportunity to learn very valuable

information you otherwise could never have afforded. This is particularly true in low-visibility campaigns.

The Sample

A number of potential sources exist where you might be able to purchase a sample list of registered voters for the particular target population that you want to poll.

- In many states, the Secretary of State's office or the state Republican, Democrat or other party can provide you with a sample of registered voters. Obviously, it is helpful if this sample contains phone numbers, otherwise a great number of volunteer hours will be needed to look up all the phone numbers of the people you randomly select.
- A handful of commercial vendors exist whose sole business is the provision of samples. Again, talk to your state party first or the consultant who is involved in your campaign and they can provide you with the names of these organizations.
- The sample is a critical first step. You need to make sure that the list of all the voters on the sample list are up-to-date and include the most recent registered voters. You also need to create random digit dialing (which means you dial numbers for which you have no idea who is on the receiving end). Through this process you can account for all the people who may not be listed in the public telephone directory.

Caution: Is Your Interviewer Pool Biased?

This is another critical component in obtaining unbiased usable data. Most survey questionnaires that are administered by volunteers are between five and ten minutes in duration. They are longer than a phone bank script and require an interviewer to read the questions quickly and understandably in an unbiased fashion. In many cases, your most enthusiastic volunteer types are the exact opposite of what you need in your interviewing team.

College students, women 35 to 50 years of age, or men and women who are accustomed to dealing with people over the phone are the ideal source for your polling team. It is essential that the phone bank area used for in-house polling be separated from other phoning done for the campaign. This will help guarantee some degree of confidentiality and not allow others within the campaign to have access to polling numbers that may be only partially completed.

Interviewing hours are normally between 4:30 and 8:30 p.m. on weeknights and weekends from 11 a.m. through 8:00 p.m. Friday night interviewing is to be avoided.

Confidentiality and Technology

As stated earlier, polling data is utilized to guide decision-making in how you allocate your resources. Polling data should be available on a direct need-to-know basis, and the campaign manager and the candidate should make that decision jointly. If you are conducting an in-house poll, make certain that you are not leaving a completed interview lying around where volunteers and other people walking by can read them.

If you are processing the data in-house, try to have the data processed in a small room that is not accessible to everybody. Virtually every campaign today has access to some computer person who is an expert who can be helpful in establishing a basic cross-tab program for you. Your computer person can also help you process the data. It is the campaign manager's responsibility to analyze the data and decide the distribution of who gets access to what data.

Survey research is extremely detail-oriented. Before you decide to conduct an in-house poll, make sure you have the resources to do it properly where all the safeguards are followed so that the campaign has reliable data to use when it's completed. If that assurance cannot be met, then in-house polling is probably is not a good idea. It is important that you do not rely on information that is biased.

Polling Supervisor

The role of the polling supervisor is twofold:

- To guarantee proper set-up within the phone bank facility where all the interviewers are to be trained in administering the questionnaire;
- To make certain that the gender and area regional quotas are being met.

When conducting in-house polling, always allow time for the interviewers to read through the questionnaire, then the supervisor should conduct role-playing sessions where the interviewers ask the supervisor the questions to be given to the public. This allows the interviewers to practice the script before they administer their first actual interview, and it allows the supervisor to assess if they are asking the questions in an unbiased manner. Furthermore, the supervisor can be difficult with the responses given, thus allowing the interviewers to face their toughest critic before they make their first call.

The supervisor should establish individual goals on how many interviews should be completed per hour per interviewer so that everyone has individual goals. The supervisor should collect completed interviews in 45 minute increments and read through the questionnaire to determine that everything has been properly recorded. This allows time to catch errors before a whole evening's worth of interviewing has been completed.

Chapter 7

Targeting

Targeting is the science of finding the right voters to whom you will aim your message. It is the culmination of researching voter history--what your voters have done in the past--and building voter files that allow you to organize the people and households you will focus your direct mail, phone calls, TV, radio and other forms of communication.

How do you begin this seemingly mathematical nightmare?

You will start by finding the right person to help you. In every community there are professionals you can pay to do your targeting. There are volunteers who have done the targeting of other candidate campaigns. There are professional pollsters who can help you define your target by conducting surveys on public opinion. And there are still other former elected officials who did their own targeting when they were in office. Find one or more of the above to help you through the process--at least for your first campaign.

To understand targeting, a few definitions are in order. The people you want to spend your time, money and focus upon are called your target. The process of finding them is called targeting. The way you find them is through researching their voter history--how many times they voted individually, how many voters per household, women/men, age, etc. As you start finding out more information about your voters, you put them in voter files--computerized lists that allow you to sort them back out in groups you might want to phone, mail or otherwise separate from other voters for getting a specific message to a portion of your target.

You target in many ways: by individual voter, by household, by precinct, and by certain demographic characteristics, such as age, gender, education, ethnicity or occupation.. Successful targeting combines knowledge of the issues and the district, sound political judgment and sophisticated number comprehension and analysis. It allows the campaign to speak directly to voters about the issues that concern them the most.

After understanding the basics of electoral targeting, you can enhance your targeting data by either getting updates from your field work (phone banks or canvassing) or by the manipulation of your targeted voter lists. Targeted precincts become the focus of where you concentrate your money and time.

- High priority voters can be:
- Swing voters who are open to persuasion and may vote for you
- Traditional party supporters who need to be motivated to support your candidate
- Individuals not registered to vote but should be because they are sympathetic to your positions or profile

The primary goal of targeting is to tailor-make a message for specific voters whom you believe will already be receptive to your point of view. If you can focus your message on fewer voters who are more receptive to you, the campaign not only saves precious campaign resources, but allows you to reach people who are the easiest to convince to vote for you.

Once you have a hands-on orientation to targeting, you will be able to apply that knowledge to targeting for your Get-Out-The-Vote (GOTV) efforts around Election Day, absentee ballot strategy and some voter registration drives. You will also be able to make the transition from hand calculations to computer data processing. The process is the same, only computers do the number crunching.

How Many Votes Will You Need To Win

Starting from the top, you determine your universe of possible voters. Take the total number of registered voters then ask your election officials what they think the turnout will be by

percentage. If it is a primary, they might say 35 percent based upon the interest with who or what issues are on the ballot. If you have 100,000 registered voters, then you know there might be 35,000 voters. If there are two of you in the primary, then you will need 17,501 votes to win. You will want to target at least 1.5 times the number of voters you need to win. In most cases, you then combine voters into the number of households where those voters live.

If there are more than two candidates, you need fewer voters to win, and you may need fewer voters to target. If there are three candidates, then you can either rely on a poll to determine the general strength of all the candidates, or you can simply assign numbers of how you think each candidate will finish, and determine the number of votes you need to win.

Targeting By Precinct History

Electoral targeting uses precinct-by-precinct election results of specific races over several election cycles. Election results, when analyzed properly, can show precincts whose vote totals indicate certain types of individual voter behavior. Simply put, voters exercise similar voting preferences from year to year which are called voter behavior trends.

Electoral targeting starts with analyzing voter behavior. It is the cornerstone of your campaign for three reasons:

- It is based on information that is relatively inexpensive and available to the public
- The data generated can be graphically illustrated on a map
- The information is quantifiable and reliably objective once you get your formula straight

Remember: targeting is based on patterns of predictable behavior. You can't see what is inside each voter's mind so you need to examine the only tangible indication of what is going on in there --the way they have voted in the past. Electoral targeting provides a structure for examining the behavior manifested in election results.

As soon as you complete your electoral targeting analysis, you will have a good idea of where (geographically) you can win votes. Once you know that information, the rest of the campaign activities will focus on contacting voters in those areas and winning their votes. Targeting data is a good reference source for making decisions not only for voter contact, outreach and field but for budgeting and scheduling.

Where To Find The Information You Need

The first step in electoral targeting, whether you plan to enter it into a computer or onto a spreadsheet, is data collection. The data you seek will be computer election results from recent campaigns. Locally, they are usually maintained by the city clerk, county auditor or county board of elections. The results are organized on a precinct-by-precinct record for each race, from the bottom of the ticket to the top offices such as President or Governor. The election results are broken down by candidate. In some cases, party registration data is also available. Sometimes the registration numbers are broken out by precinct as well.

A precinct guide or precinct finder is another helpful document to use in targeting, and it is usually available at the county clerk's office. A precinct finder lists street addresses and their corresponding precinct numbers. If a street map of the district or maps with the precinct boundaries are available, you should buy at least one set.

A word of caution, re-districting or the use of special precincts for special elections will render your data useless unless it is possible to "translate" results from old precincts into new. With reapportionment of districts every ten years, you must check all district lines before you use the data from any election.

Types of Election Results to Collect

Before you actually collect election results, you must decide which races to analyze for electoral targeting. Certain races have significance for your particular campaign. Results of other races are much less meaningful.

Special elections, initiatives and referendums have unique characteristics. Special elections are usually held on a day other than the usual primary or general election day (hence the term, “special election”) Voter turnout is usually lower than normal. For example, if the special election is for school board, voters who are motivated by their interest in public school education will participate.

If the special election is for an office that is not directly linked with a specific issue, say county clerk, identifying voter motivation is more difficult. Knowing the events that lead to the special election might give some clues as to voter motivation. To summarize, some elections are easier to read than are others.

A referendum on airport noise regulation is a good example of how important it is to understand the dynamics of a race before you decide whether or not to include it for targeting analysis. Clearly those living near the airport would vote in the election, but why they vote the way they do would be less clear. Some voters may vote for tougher restrictions because of their ideas on the environment and noise pollution. Others living near the airport may vote against noise regulations because they work at the airport and stricter noise regulations might mean fewer flights which could mean fewer jobs.

The lesson here is to consider special elections and referendums for inclusion in your analysis. Be sure you fully understand the dynamics at work in these types of elections, before selecting them as one of your races for analysis.

Another set of election results that should be included in the analysis are the election results from the type of election in which your candidate is most immediately involved. If your candidate is running in a partisan primary, use primary election results. If there has not been a contested primary for the seat in many election cycles, look at other primary races that are on approximately the same level of government.

For example, you are running for state senate and there has not been a contested state senate primary over the past few years. Look at the results for state representative races for those precincts that are contained in your district. If there were no contested primaries in any legislative race, then consider a high profile county-wide race such as commissioner or supervisor.

Be sure to use results from a combination of races. Presidential, Congressional, School Board, County Clerk--each attract different levels of turnout and types of voters. Generally speaking, executive races such as President, Governor or Mayor are high visibility races and will attract the highest number of casual voters. County and other municipal elections traditionally turnout the party's baseline voters, and are good measurements of your perfect voter's behavior (perfect voters are those voters who turn out every year to cast their ballots).

When selecting targeting data, you need to clearly understand what you are looking for. If you are looking for precincts where your favorite issues will be most attractive, then you will want to look at issue-oriented elections. School, initiative and referendum elections can be very helpful. Precinct election results can tell you the strongest support to issues similar to yours.

If you are looking at partisan election results, partisan primary or general election results are best. You can find and chart categories such as precincts where Democrats are strongest or precincts where women have gotten the most votes in the past.

Once you know what your target is, you can develop this data to show where you should concentrate your efforts.

Once you have decided which races are going to be analyzed, you need to organize the information. This is called “arraying” the data. Whether the data is manipulated on a computer database or by hand with the use of a calculator, it should be arrayed with precision and care.

Now you have decided which races to analyze. Now, neatly record all these precinct by precinct election results on a spreadsheet, carefully showing the vote totals for the races you chose next to each precinct number. Now the fun begins.

Targeting For A Primary

In a primary election, you want to assess partisan turnout (Democratic, Republican or other party turnout). You will look at:

- Average partisan turnout
- Percent of effort index
- The efficiency index

Once you have determined the priority precincts, then determine which individuals within those priority precincts will most likely be receptive to your persuasion message.

Average Partisan Turnout

This figure shows the average number of partisans voting in each precinct. To get this number, add the number of votes cast in a precinct for the primaries you are analyzing, then divide the total by the number of races you have selected.

Sample Precinct:

Congressional District Legislative District
Ward 5 Precinct 315

1986 Primary - Republican State Senate

- R. Iida 119
- J. Kainber 98
- K. Smith 7
- Total 224

1984 Primary - Republican State Representative

- S. Garcia 126
- L. Bates 67
- Total 193

1986 Primary - Republican U. S. Congress

- J. Baker 314
 - S. Robins 27
 - Total 341
 - Total partisan turnout in these races: 758
 - Divided by number of races: 3
- Average partisan turnout: 253

Let's say the total number of precincts you analyze is forty-seven. After finding the average partisan turnout, rank the precincts, one through forty-seven. The number one goes to the precinct with the highest average partisan turnout, and forty-seven goes to the precinct with the smallest average partisan turnout.

Percent of Effort Index

This figure shows what percent of the district this precinct contributes to the overall jurisdiction total vote. Take the total number of votes cast in that precinct (in the state senate race in 1986, there were only 224 votes, but if we check to see how many total voters voted in

another race on the same ballot, say for example, the U.S. Congressional race, we find there were 758 votes) and divide it by the total number of votes cast in that primary race. If there were 6,487 votes cast in the primary, 314 of all the votes came from precinct 315.

Another way to look at these numbers is to look at your opponent's totals and see which precincts contributed the most to his previous primary victory. If the opponent is out-performing in certain precincts, you should find out why.

Efficiency Index

This index measures the relationship between average partisan precinct turnout and partisan precinct registration.

Take the average partisan precinct turnout and divide it by the partisan precinct registration. In our sample precinct, Ward 5, Precinct 315, let's say Republican registration in the precinct is 314 voters. The efficiency index for precinct 315 would be 81 percent. Once again, you will want to rank precincts with respect to their efficiency index.

In some states, this will not be possible because the voter registration law does not require stating party affiliation at the time of registration.

Fall-off is a term used to describe the difference between the number of votes cast in high and low visibility elections in the precinct. For example, the difference between the number of votes a candidate for President receives and how many votes a candidate for Dog Catcher receives.

In our sample precinct 315, you will notice that the total number of votes cast in the 1986 state senate primary was 224, while the total number of votes cast in the 1986 congressional primary the same year was 341.

The fall-off for precinct 315 would be 34 percent; the difference between 341 and 224 is 117, divide that number by 341 and the fall-off is 34 percent. In some races, the fall-off is greater; in others, the fall-off is less. Again, ranking precincts will make these figures more meaningful.

What Does This Mean?

If you are a challenger running for the state representative nomination, you will need to know the priority precincts for the primary. Gather the data for primary elections, make the calculations that have been described in this chapter, then put on your thinking cap.

You will want to direct your efforts where they do the most good. You need to assess your strengths. If you are running against an incumbent, the fall-off figures might be very revealing. If there is a traditional lack of interest in those races which appear further down on the ballot in primary races, as evidenced in sample precinct 315, perhaps a strong candidate's message from you to partisans about the importance of a strong ticket in that precinct would bring more partisan voters your way.

But if the fall-off numbers are highest in the smallest precincts, winning a majority of the fall-off voters might not win the day. If you think you can win 51 percent of the fall-off vote, add up the totals and see what they indicate.

The efficiency index reveals areas where voters of your party just don't turn out for primaries. Perhaps there is room for a challenger to pick up votes there, but a low efficiency ranking could indicate that the voters in that precinct are happy with the incumbent and have never perceived any previous primary challenger a threat to the incumbent they support.

Crunching numbers is only part of the battle. You need to understand what went on in the races before and what will be the same or different. You must be curious about why certain numbers are higher or lower than average. Successful targeting is the product of an inquisitive mind patiently examining accurate data.

Targeting For A General Election

When you are targeting for a general election, you want to find precincts where there are potential swing voters a voter who has no allegiance to any political party and whose unpredictable decision can change the outcome of an election. To make that determination, you will want to examine precinct results in much the same way you do for a primary.

Look at the loyalty or efficiency index. If the precinct is under performing, target it for Get-Out-The-Vote (GOTV) activities. If there is a small difference between the Republican Presidential totals and the Democratic Governor's race in the same year that would indicate a precinct is filled with swing voters. If the precinct strongly supports Democratic Congressional candidates but always elects a Republican to the State Senate, you should find out why. At the very least, this would indicate a precinct where voters, if persuaded by the right message, would be swing voters.

In the general election you must be sure the high partisan turnout areas are going to turnout for your candidate. If your candidate is a challenger it is especially important to nail down the base vote, the voters you know will comprise your main target.

As mentioned earlier, put the results of precinct analysis on a map of the district. By using colored pushpins or dots, you can geographically locate target areas. Then ask your self, "Does this make sense?" With good election return analyses and knowledge of the district, you will be able to refine your targets more effectively.

Targeting Individuals

A campaign targets individual voters for two reasons.

- First, it allows the campaign to direct specific messages to individual voters. Voters who are interested in childcare receive information about the candidate's stand on that issue; seniors are interested in Social Security or local health issues. Targeting individuals on the basis of age allows the campaign to direct information to seniors.
- Second, a campaign targets individuals because it saves precious campaign resources. The hours spent on targeting individuals will pay off in terms of lower costs for voter contact activities such as direct mail and phoning. If you know the people who will probably not respond to your message, why send them brochures?

Once priority precincts are defined, you can further target voter subsets from additional information you get from polls or lifestyle analyses. These will help you determine which individuals to target in those priority precincts. You need to be able to distinguish which voters are most likely to be open to a persuasive message or to the candidate's profile, and which voters need only to be reminded to vote on Election Day. If your campaign has access to data processing, you will be able to target the same types of voters who live outside the priority precincts.

There are many approaches to individual targeting that are not based on electoral targeting. For example, if you knew all the voters in your district who were identified as pro-choice voters who are for a woman's right to choose whether to have an abortion, you could target the precincts where the choice support was strongest and send a persuasive message to those voters which included information about your candidate and her strong choice position.

How to Build Your Individual Voter Files

There are several sources of information about individual voters. All will help you gain access to lists of voters you will want to send direct mail pieces, phone bank or canvass door-to-door.

Lists are available from interest groups or from commercial companies that specialize in targeting for marketing purposes. You can also create your own list of targeted individuals by going into the field and surveying voter attitudes. Check in the Yellow Pages of your telephone book to get the names of list vendors.

Lists purchased from the elections office, city clerk or county auditor are the least costly and most easily available. Each office has a certain way of fulfilling orders. Be sure to be specific about what names you are ordering. Find out if voters can be selected by age, party affiliation, primary voting history, etc. Once you have determined your priority precincts, you can order lists of the individual voters in those precincts.

In most states the State Party maintains voter files and makes lists and labels available to candidates on its party slate. You can find out their procedures for getting targeted lists by calling the State Party headquarters, local party chair or an incumbent in your area. When you have lists either from the clerk or the party, you need to create your own voter file (your particular list of voters with the specific characteristics that help you target a message they are likely to like).

In most cases the job of voter file creation is done with computers or by professional data processors. If you are running in a small district campaign such as city council or state representative, you should be able to log these names on a personal computer.

If your candidate has the endorsement of groups with membership lists, make arrangements to contact the key individuals on those lists. Many groups will not give you their membership list, but they will allow you to produce direct mail pieces which they will mail to their supporters.

You can further increase the kinds of information you have in the individual voter files, by doing your own fieldwork. By going door to door or using a phone bank, you can enhance targeting data with the voters' responses to your questionnaire.

Voters You Don't Want

Within priority precincts there will be individuals to whom you should not direct any resources. In the general election they are loyal supporters of the opposition party who would never consider supporting your candidate. Remember, each party has a baseline of core supporters. The people who constitute that baseline live throughout the district, and there are some in every precinct with some precincts having a higher baseline than others.

A Case Study

Let's go back to precinct 144. There was a landslide election for Governor in 1988 (which is not on the chart but consider it a fact for purposes of our case study). Of the 762 votes cast in precinct 144, the Republican received 189 votes so you can count on those 189 Republicans being strong Republicans in future races. If you are targeting in precinct 144 and trying to identify potential voters for a Democrat, you can identify 189 solid Republicans: the Republican baseline. Forget about them for the rest of the race and concentrate on the 573 potential supporters for your Democratic candidate.

Of those 573 Democratic voters, a certain percentage of them will constitute the Democratic baseline. Once again, look back at your electoral targeting data. Find a measurement of the Democratic baseline (say, for example, a race where only the true Democrats voted, such as a low-visibility race such as Insurance Commissioner). You can automatically take that number of voters and plan for them to be part of your GOTV activities. It's the rest you will attempt to court and convert.

Let's assume that of the 573 potential supporters, 45 percent of them constitute the Democratic baseline, so 258 voters should be voting for your candidate in the general election just because she is the party's nominee. That means you will target 315 voters in precinct 144 for persuasion voter contact.

How do you figure out who they might be? If you were using a computerized coded voter file with voter age and history, finding those potential supporters would be easy. Without those pieces of information, the task requires direct contact with the voters in the field.

You will have to order lists from the county election's office, the state or county party, or commercial sources such as list brokers. Commercial lists are good from the standpoint you can narrowly define the lists of names according to demographic characteristics or lifestyle. But they

are not set up to identify registered voters nor are they organized by precinct, which is what you need.

On the other hand, the individuals whose names appear on commercial lists are usually voters and if you take the time to match the address with the precinct using the precinct guide, you can put each individual in her correct precinct.

The point is this: you need to get the most up-to-date, accurate list of potential supporters available. Only by knowing specifically what is available from each source can you decide which set of lists is best for your campaign.

For example, order the labels from the county elections office as follows:

- A set of labels for voters who have voted in all of the past three partisan primaries and live in your targeted priority precincts (the so-called perfect voters).
- A set of labels for voters who are registered with their party affiliation, but whose primary voting history is zero or less than three primaries (swing voters).

In this way, you can target your GOTV efforts towards the perfect voters of your party. And, you can target your persuasion phone banks and direct mailings to the swing voters. If you want to talk about senior issues, order the same sets with subset of voters age 60 and over. If you wanted to target for education or childcare issues, order a subset of labels for voters who live in households with two voters between the ages of 25 and 45.

The more work you can have done by the county clerk or State Party to narrow and define the individual voter's profile, the less you will have to do yourself. It may well be that the information at the source of these labels is sufficient to define your target universe of individual voters with very little or no fieldwork or door-to-door, voter outreach efforts on your part.

If you have access to polling data about the issues and the voters in your race, it will be a helpful guide in deciding which individuals to target. But if you are building your voter file on your own computer, you probably don't have polling data. So how do you make these decisions?

Look at the issues of the campaign. If your candidate is going to fight development in an area that is currently a wetland habitat, then you need to find all the voters who will support that issue. If you are endorsed by environmental groups, don't forget to make arrangements to contact all the voters in their group who reside in your district.

The groups that endorse you might have polling data on their issue that shows what types of individuals are likely to support wetland preservation. Again, you can use that when you are deciding whom to target. The same resources are usually available from local interest groups who have an affiliation with national groups.

Is education or childcare a major issue of the campaign? If so you will want to designate a code on your lists of those who have children in school or day care. The point is, figure out what are the hot issues for potential voters then develop a system of codes or symbols that can be easily marked on the voter files you are creating. By marking the individual's card with codes, you can select all the individuals in all priority precincts whose codes match. You can then group and target them to receive a piece of direct mail or phone call about the issue that concerns them the most.

Only the very smallest of challenger races will not be using a computer to assist in targeting. The following section will give you some tips about how to deal with data processing vendors and consultants who can provide targeting services to your campaign.

Targeting With Computers

Professional data processing for political purposes is readily available from software companies and data processing vendors. Devoting campaign resources to targeting can be the smartest move your campaign makes. Once you know how many you have targeted and where they are located, all other decisions should be made based on maximizing the voter contact to

persuade likely voters to support your candidacy and your campaign's efforts to Get-Out-The-Vote.

In-House Database Targeting

There are many companies that provide software and "online services" for targeting, producing direct mail pieces and producing other campaign reports such as donor information and scheduling. These companies advertise in the many national and local political publications. You can also ask incumbents or party personnel for recommendations. In this day of the professionalization of campaigns, there are more and more trends towards one-stop-shop campaigns--those campaigns which can produce their own labels, walking lists, phone bank cards and desk-top published brochures.

This trend allows for campaigns to purchase their own list of targeted voters which becomes their voter file. The campaign determines it will send a persuasive message to these voters. The communications director creates a simple brochure on a simple graphics program on the campaign computer. The database manager runs a copy of the targeted voters on labels and the office manager makes a few thousand copies of the brochure for this one targeted mailing.

Most of the software database management programs you can purchase to handle the manipulation of the targeted lists are user-friendly, but they do require a working knowledge of computers, as well as targeting fundamentals, to use efficiently.

Voter File Partnerships With A Local Vendor

Another source of data processing services are the vendors who maintain voter files. These companies have large mainframe facilities and their sales representatives will be happy to explain the types of computer generated materials available from their firm. These products usually include labels, walking-lists (targeted voters organized by addresses), personalized computer letters and statistical reports from the voter file.

Once again, you must have the knowledge and confidence in your targeting abilities to work with these firms. If you place an order that is not clearly defined or does not accurately define what you really want, you will receive exactly what you ordered. You will pay for it, and you may never be able to use it.

Professional Direct Mail Consultants

Yet another source of targeting data is that generated by people who do it for a living, year in and year out, election after election. Those people are the voter contact/direct mail consultants. They can give you exactly what you need from an analysis of who should be your targeted voters to the labels, lists and creative mail design you should use. These professionals cost more than building your voter files or contracting out with local vendors, but they offer comprehensive services for your campaign. But, you should include them in your review of possible options, particularly if your campaign will not be using radio or television ads.

Voter contact/direct mail consultants use the data processing available directly from the vendors, but your voter contact/direct mail consultant works for you, not the data-processing company. The amount of time the consultant devotes to developing targeting specifically for your campaign, along with her or his experience in targeting all types of races means the targeting data will be accurate and comprehensible.

A Review Of The Fundamentals Of Targeting

In a time when voters complain about the impersonal, negative nature of campaigning, effective targeting will allow your campaign to speak more directly to voters about the issues that interest them the most. The responsibility of any campaign manager is to win the election using the optimal amount of campaign resources at the lowest cost to accomplish that victory. If you target with precision, you can maximize positive, personal contact with voters. The campaign must contact very specific voters:

- Those who are most likely to vote in the election
- Those who are most open to a persuasion message

These are individuals who go to the polls on a predictable basis and whose votes are cast for the individual, not the party. Those who vote for the party must be contacted to raise turnout, but the bulk of campaign activities must be directed to the swing or undecided voters.

Establishing the common denominator of voters most likely to be attracted to the candidate is a matter of understanding data from election results and voter history as well as other demographic data pertaining to individual voters. Collecting the data, analyzing and interpreting it, is the essence of targeting. The effort requires common sense, accuracy in manipulating numbers and a sense of humor; the work is exacting and tedious at times.

Experience in targeting is the best teacher. If you understand the underlying principles of targeting, you will have a frame of reference for each campaign from which you can tailor the targeting to meet the needs of each new situation.

Tips On Targeting

Don't be afraid to ask questions --regardless of how simple you think a question may be, never operate on assumptions or unclear understanding of numbers, statistics or methods. Any statement may be based on an incorrect assumption or on a different set of data. Get the facts before drawing a conclusion.

Know the district--acquire a good general knowledge of who lives there, where they work, what they do for recreation and how they vote before diving into number crunching. If you don't, you won't have a frame of reference for the "Does this make sense?" test.

You don't have to target everybody--you just have to target enough to win. On the other hand, you have to target enough as not everyone you focus upon will be voting for you.

The Almanac of American Politics, can be found in most libraries. It will help you understand American politics by exploring, explaining and charting the politics of every state and congressional district every year. It is a good place to start, even if your candidate is not running for Congress or Governor. Chambers of Commerce have all sorts of free or inexpensive demographic information, as do city or county planning agencies. Commercial sources for this type of information can be found in marketing and campaign trade publications and online.

Know who your opponent is targeting--after you finish your targeting, think for a moment about the same process your opponent is going through. Chances are he could be targeting the same or similar groups. You might want to adjust your target to either go after his target with a vengeance, or not go after them at all in favor of a better target that isn't his focus.

Triple check all numbers--a small mathematical error in the beginning can become a giant headache or even worse, go undetected and misrepresent critical data.

Clarify the goals of each targeting analysis before you start crunching numbers.

Back up intuitive thoughts with numbers before dedicating resources to implement a program.

Be creative--if the data you need is not available in the form you want, think of ways to construct the data by combining sets of data. At the same time, be sure to look at comparable data and keep things straight or your numbers aren't worth the paper on which they are printed.

Develop your own pattern for analyzing data and follow it religiously. You must be able to adapt your methods to each situation, but by following a basic routine, you are less likely to omit an important step. Be patient and circumspect.

Final thought: A campaign that has a well-conceived and well-organized plan and a carefully chosen team has a much better chance to succeed. To run an effective campaign, chart a clear, solid, consistent course ...then follow it.

Chapter 8

Fundraising

Fundraising has been called the mother's milk of politics. You may not win with it, but you certainly won't win without it. More than all the other factors put together, fundraising determines today's winners and losers in the campaign world.

Fundraising is the cornerstone of getting your message out to the right voters. Direct mail, radio, TV, yard signs, and all the other avenues for getting attention cost money. And, in most cases, the money you raise in the early days of the campaign signals to the press who is a viable candidate and who isn't.

The rough-and-tumble world of today's campaigns is growing more professional. From telemarketing phone banks to voter list services, the vendors who now service the political market comprise a list that's as long as your arm. And services that were once the exclusive realm of volunteers are now being paid for in many campaigns.

All of this costs money...lots of it.

Asking for money is commonly the least favorite job--and the most important one--that candidate's assume when they declare for office. Unless you are independently wealthy and can buy everything yourself (often voters look askance at people who buy the office), your life on the campaign trail will involve much more dialing for dollars than asking for votes.

But, no need for despair. For every \$1,000 you raise, there are hundreds of people who will get your message. And for everyone who contributes to your campaign, there are several more who will be influenced by that person's commitment. Someone who writes a check is definitely going to vote, and is likely to tell his housemates, office colleagues, family and friends about his choice.

If someone invests in your campaign, he or she is likely to be an honorary member of your fan club. In fact, reporters looking for an interesting approach to the money of today's campaigns usually look at two numbers: the amount of money raised, and the total number of contributors.

In many state legislative races, it's frequently the case that the candidate who has the most contributors is likely to win, even if the other candidate has raised more money.

How much money do you need? It's hard to say, but there are lots of clues to determining what you will need to win:

- How much was spent by candidate's who ran in this race last cycle?
- What has changed since the last race (new regulations, redistricting, incumbent in trouble, voters wanting change, etc.)?
- Are you a challenger? (The race will cost more.)
- Are you the incumbent? (It should cost less, but you will be able to raise more.)
- Is this an open seat with many candidates? (The campaign will likely cost less than a challenger race.)
- Were you appointed to this office to fill a vacancy, and now must run for election? (This could cost less.)
- How many people are in the race?
- What else is on the ballot? Is this a presidential election year, a gubernatorial election year or an off-year election?
- Who or what else is on the ballot with similar values or party allegiances that might compete for the money you will solicit?

- What base of support are you starting with, and how many votes do you think it will take to win?
- Will your preferred method of voter contact be direct mail, radio or TV?
- What else will influence the cost?

The answers to these questions will help you determine how much your campaign will cost. If you start with how much the last person spent in your race and review the number of voters to whom you must get your message, you will have a good base upon which to begin the budgeting process.

After you budget, then you tackle the fundraising needs.

Raising money requires discipline. It requires organization. It means being persistent. Asking for money and getting it also requires good timing, a sense of humor and enough self-esteem that you can handle delays, indecision from friends, and rejection over the course of a campaign day.

It is not an easy job, but if you put time and energy into understanding the nature of fundraising, you can raise as much money as you need and more money than you think.

Raising Money The Right Way

Candidates are always overwhelmed by the amount of money they must raise. Most hate the job long before they ever learn how to do it properly--and all too often candidates pick up poor habits in phoning for donations and make the process longer, more arduous and painful as they go.

The unfortunate truth is that most candidates spend more time learning about superficial issues than learning how to ask for money.

Campaign managers and steering committees routinely criticize their candidates for not getting on the phone and raising money, when the only assistance they provide is a phone book, a telephone, and an ultimatum to raise \$100,000.

Some campaigns begin by determining how much money they think they can raise and then putting a budget together to meet those expectations. Such logic is fatally flawed. After all, if you only raise the money you think you can, and that's not enough to win, then all your efforts will be in vain from the start. A good campaign plan begins with a reasonable budget that assesses what it will take to win and then develops a fundraising plan to raise the needed funds.

Successful fundraising depends on many factors:

- A multifaceted, written fundraising plan
- A seasoned, paid fundraiser
- Good research on previous high donors from previous candidates
- Updated lists of prospective donors on disk
- The right fundraising message
- Enough time set aside for raising money
- Dedicated money to pay for mailings and events
- The right attitude of the candidate.
- A commitment from everyone to raise the money.

Who Will Help You Raise Money?

In today's campaign world, although the candidate is always the best fundraiser, everyone needs to raise money. There should be no separation of functions between volunteers and

fundraisers. Everyone should help with fundraising. What can a relative novice do to help? How can people help raise money when they have little time to do so? And how can fundraising be a less tedious chore?

A campaign can use the talents of anyone who has a basic interest in helping to raise money to get the message out. Too often a candidate and a paid fundraiser are the only people dedicated to raising money.

If a dozen people pitched in to help, more money would be raised more quickly—and more people would be attracted to helping. Every candidate should have:

A researcher/organizer to gather names, addresses and telephone numbers of frequent campaign contributors in the area and other prospective donors referred to the campaign.

A computer person to maintain the list of prospective donors and ensure that the candidate always has an updated list of names, with no duplicates, of good prospects to call.

A scheduler to make sure that the candidate has plenty of time to phone for contributions.

A coach to help the candidate develop her fundraising message, (different from the campaign message), then sit with her while she phones, to be sure that she has the process and the message down pat.

A finance committee to help raise money by introducing the candidate to prospective donors.

An events committee whose members will help organize, orchestrate and ensure attendance at fundraising events.

Small-donor coffee hour coordinator where hosts and hostesses are drafted to invite friends and colleagues to their homes to hear the candidate speak, then make a pitch for contributions.

People who formerly or presently serve on association or political action committees that endorse and disburse contributions to candidates.

Other candidates and elected officials to offer moral support, interesting stories and clues on how to ask for money and stay on course in following the fundraising plan.

A great fundraiser to coordinate the details of the fundraising process and make sure that all pledges are followed up.

The fundraising process requires that you scope out many different people, lists, organizations, and insiders before you begin. A good fundraising drive begins months in advance of a campaign. However, once the campaign has begun, it's important that you make calls every day or at least three times a week. Failure to have completed all the research should not deter you from getting on the phone once the campaign begins in earnest.

The Fundraiser

The last person hired is often a professional fundraiser, usually after half the campaign is over and all the key people realize how far behind the campaign is falling in raising money.

Hire a fundraiser as soon as you know you are running for office.

Today's fundraisers are not easy to find, and they are traditionally more expensive than a campaign is expecting to pay. However, if they are good, they are worth your candidate's weight in gold. No decent fundraiser works for just a commission, though many will take a commission in addition to a monthly retainer.

A fundraiser should be part task-master, part people-recruiter, part confidant of the candidate, and full-time schmoozer--able to leap into powerful elite circles of high donors as well as able to stuff envelopes with volunteers on a Saturday afternoon.

A good fundraiser can walk into a law office or political action committee office with only her charm, and walk out with a list of prospective donors for the candidate to call, a commitment to hold a conference-room fundraiser, and a bag full of office supplies to augment the campaign's day-to-day needs.

Campaign fundraisers are not easily found, which is why you should begin early and in earnest to find the right person for your campaign. Track down last year's (and the previous year's) candidates who made their budgets. You do not need to hire a campaign fundraiser from a winning campaign--in many cases a losing campaign will have a great fundraiser, who has learned more by losing than by winning. Other places to look for fundraising talent include state political parties, local women's groups, non-profit associations, former candidates and campaign managers, college students eager to learn about fundraising, and people who have organized major community fundraising events.

The Fundraising Plan

A comprehensive fundraising plan is developed by the fundraiser (and perhaps a fundraising consultant) along with the candidate, prospective finance committee members and others who have helped put together written fundraising plans for previous campaigns.

The fundraising plan should be a diverse, interesting and layered plan that involves many people and many more prospects. Campaigns rely on reaching prospective donors in a variety of ways. High donors require personal meetings or phone calls. Mid-level donors require personal phone calls, letters and events. Low donors require letters and events. Insiders almost always give money at events or personal meetings.

However you court your prospects, call them according to their potential giving power: high, mid-level, or low donors. Then set your game plan to reach them through one of the following ways:

- Personal phone calls with the candidate.
- Finance committee efforts: personal meetings, conference calls or bundling of checks.
- Small donor mailings to interest groups and individuals.
- Online fundraising.
- Credit card pledge plans.
- Phone banks
- Events: the campaign kickoff, celebrity evenings, populist events, coffee hours, etc.
- PAC Fundraising

All of these methods will need a budget and time allocated on the candidate's schedule to effectively implement. Equally important to the monetary budget is the volunteer and professional staff budget it will take to complete the fundraising plan. Campaigns are filled with great intentions, but seldom filled with really great fundraising. Start with a realistic plan that seeks to raise at least 10 to 20 percent more than your anticipated expenses, as campaigns traditionally need more money than they initially think. In addition, some elements of your fundraising plan will simply not reap the amounts you think.

The Candidate's Contribution

Most candidates put from 10 to 15 percent of the total budget into the campaign themselves. If you don't invest in yourself, how can you expect others to contribute or raise money? The days of expecting everyone else to shoulder the campaign expenses without putting in your fair share are dwindling, if not gone. No philosophical or good-government argument nor personal poverty will cut through the ice of high donors and political action committees who are looking for reasons not to support candidates. Personal commitment is judged in great part by your own cash contribution to the campaign.

The candidate usually pays for some campaign start-up costs--stationery, envelopes, the "campaign look" (logo), and perhaps a consultant to figure out what to do first. Computers, lists, photos, and a new phone line (and its exorbitant deposit) are also typical expenses that are incurred before the money starts flowing in from friends and early supporters.

Remember that it takes money to raise money.

Asking For Money

The best step to ensure your campaign fundraising is off on the right foot, is to learn how to make effective calls to high-donors, first to people you know who are likely to support you and have demonstrated their ability to contribute large amounts to political campaigns. In most campaigns, high-donor fundraising results in over half the money raised in the entire campaign. Consequently, if you are anticipating spending \$60,000, then it is not unreasonable to plan on raising \$30,000 through high-donor (more than \$100 donated) phone calls.

To begin this process, you need to do it right:

- Have the right approach and message.
- Be in the right mood with the right attitude.
- Acquire and build the right lists to call from.
- Engage in the right advance notice to prospects.
- Follow up on all pledges right away.

Candidates always wonder where they will get names of people to call in order to raise all the money in their budget. Money is raised in direct proportion to the amount of time you spend asking for it. If you only spend an hour a day raising money, you will raise a third of what you could raise if you spend three hours a day fundraising.

Doing the research to get ready to fundraise takes months; setting up the process takes weeks; setting up the contacts takes days; making the contacts usually takes hours; but making the pitch should only take a few minutes, and follow up takes only seconds.

The goal in all good high-donor fundraising is to know more about the people you call than they will ever know about you (and you will be the one on TV and radio, as well as, in direct-mail pieces and the newspaper). Through research, you'll learn that the same 10 percent of contributors fund 90 percent of all campaigns. The rest comes from those circles of people you know personally.

These high donors should give you a list of at least one hundred, and hopefully more than two hundred, people from whom you can expect to receive early money and support. Though they are unlikely to contribute large individual amounts, they give the campaign a boost by giving you added numbers of supporters, which helps encourage the traditional high donors to give you early money.

Your job is not so much to convince a prospective donor that she should support and contribute to your campaign. Your job is to negotiate an amount. If you get bogged down in the "why should I give to you," you'll never get off the phone with a contribution.

The goal in convincing someone to give you money is to first convince yourself. You are in this world of politics to make your community a better place. You must understand that you are not begging for money. Rather, you are asking people to invest in you and the pursuit of a better world. Believe the experts and current elected officials when they say, "Public service is no peaches and cream." It is a tough job where you will work day and night, with and for people who never think you do enough for them. The pay is never commensurate with the time and energy you have to give--particularly since you must sacrifice valuable time with your family, which you'll never get back.

You deserve every cent you raise. Believe it.

Asking for money gives candidates cause to rethink their decision to run. In many cases, you will ask people you may not even like. You will have to ask them four or five times to give you

money that you would rather earn by waiting tables. And even the best fundraisers have days when 70 percent or more of their calls for cash result in rejection.

Understand the importance of putting together the right lists, in the right order, with the right backup information and the right timing. Your list should be arranged so there are some people you may know interspersed with those you do not. The data sheet detailing the names, phone numbers, and basic background information on the person you are calling should also list that person's general or specific history of contributions.

Remember, you need to know more information about your prospective donors than they will ever know about you--and you're the candidate.

The best information to compile comes from public files located in the city, county or state office that records campaign contributions. Most people don't know themselves how much they give to political campaigns. But if you research, record, and then compile, you'll find that a single person listed as giving \$50 to one candidate has also given \$50 or more to others. You need to know the giving power of the people you call. If your research reveals that a person gave \$250 total to four campaigns, you know that he or she can afford to give you at least \$100--if you can make a compelling case.

Nothing is more of a lost opportunity than to ask a person for \$100 only to have them agree in less than a second. Ouch. You should have asked for \$250, or the maximum contribution allowed. Once a donor gives--ask again at a later date.

Exactly How Do You Ask People For Money?

1. Establish a quick, comfortable rapport. Start with a friendly "hello," two or three sentences of introduction or, if you know the person, catch up from the last time you talked. Explain your purpose in calling and how you got her name, revealing that you know the prospect is a frequent donor with a line like, "I was reviewing the campaign contribution records and was happily surprised to see that you and I have shared the same interest in issues and candidates. I supported Jack Jones, Sandy Wienert, the school bond, and those same three candidates you did for City Council."

2. Explain why you are running, what you have in common, and why the prospective donor would find you an exciting choice. Explain how you intend to win and what makes your campaign unique. This should be as interactive a conversation as possible. Don't drone on forever. If you've been talking for more than a minute, ask a question, or at least check to make sure that your prospect is still alive on the other end of the line.

3. Give her an "insider's" look at what's going on in the campaign. Prospective donors are investors in a small business--your campaign. A candidate should have insider information about the campaign (recent polls, strategy plans, key people who have endorsed your candidacy, fundraising goals reached, etc.). If a person has not contributed to you before, then a few comments about your key issues and background can be added. Keep a sheet of these "campaign news tips" with your calling list.

4. Ask for a specific amount of money. Be very direct about your reasons for calling: a contribution of more than \$100. Ask for more than you think the person can give. The information sheet from which you call should detail each person's contribution history. Remember that your time is valuable; don't demean yourself by asking for less than you are worth.

5. Explain why you need the money. Have a list of expenses that need to be paid in the upcoming weeks. Donors prefer to contribute to media buys for radio and television, direct mail expenses, yard signs, and things they can directly see or touch. Asking for money to pay staff salaries, rent, or the phone bill is never as enticing to a would-be donor. Know the specific amounts that each of these things will cost and ask the prospective donor if she will contribute \$100 towards the \$4,642 needed for the forty-seven radio spots. Or ask for \$132 to pay for the printing of your new fundraising letter.

6. After you have asked for \$100, stop talking. Even if the pause is seemingly forever, and you find the silence unbearable, resist the temptation to talk. Let your prospect break the silence. If they show any signs of reluctance, go back to step four, but don't start negotiating down the amount in question.

7. Instill a sense of immediacy and get that check. Remember that only 80 percent of pledges ever come in. However, 100 percent of the checks you go get today actually make it to your checking account. Offer to send someone out to pick up the check right away. Some campaigns have found it more than worth their time and trouble to delegate a person to run around and pick up checks on days when the candidate is calling. If picking up the check is not possible, then follow up the call with a short thank-you letter within 24 hours. The letter should restate the amount pledged and the urgency for it and include a return remittance envelope.

What If A Prospect Says She Can't Afford A Donation?

If you have given it your best try and still the prospect is not moving, don't hang up yet. If you can't obtain a large donation now, then try for a smaller one today and call again later in the campaign as you prove how well you are doing. You can tell the prospect that the press is judging this race not only on the amount raised but on the number of individual donors.

If a prospect can't give you cash right now, ask if she will join your pledge program--or better yet, part of the credit-card plan. She can contribute \$25 today and another \$25 each month until the election.

If that still isn't working, try asking the prospect to help you raise money. Perhaps she can ask a few people in her firm to meet with you, or have her spouse contribute. Ask if she can check her Rolodex right now and give you the names of three or four people that she will call and tell to expect a call from you. If you're still getting a cool response and no help, then ask if she can volunteer some in-kind service, equipment, or supplies. This could be anything from staplers and scissors to computers or printing services.

If she's still playing hard-to-get, ask her for advice and tell her you will call her back in the future. Don't hang up until you have a win/win situation. You need to feel good (or at least not bad) about the experience, not so much for her, but for you, as you need to go on to the next call with an upbeat attitude.

Every time you succeed in getting a contribution, it makes the next one easier. Only experience contributes to good high-donor fundraising.

Questions People Ask When You Ask Them For Money

How is it that you expect to win? You need to be able to explain (in less than one minute) that you are a viable candidate who not only understands what it takes to win--but has what it takes to beat your opponent.

How much money have you raised to date? The universal question posed by every high donor, this question stops most candidates in their tracks if they cannot say they've raised a serious amount within weeks of their initial announcement.

How much will this campaign cost, and how do you expect to raise it? In addition to your own personal contribution, this is where you trot out all of your early pledges and explain how many people promised you, before you announced, that they'd be there for you. Anticipate what lists you'll be able to get, and what political action committees are likely to be there for you.

Who's helping you? Bring out those lists of endorsements and endorsers who encouraged you to run. Have the names of as many VIPs as possible, along with their promises of money.

Can you delegate? Who is your manager? Who is your consultant? Every campaign requires at least eight key players to allow you to focus on your job as a candidate. List your manager, your fundraiser, your finance committee chair, your volunteer coordinator, your media or general consultant, your pollster, and anyone who's helping organize seniors, women, the business

community, labor, etc. Contributors want to know you're not going to try to manage your own campaign.

How much time are you spending on the phone? If there is ever a question you must answer with conviction, this is it. People who give money to candidates know that there is only one way to succeed: you must be persistent, unapologetic, and dedicated to getting on the phone to ask for money.

What are you going to do that's different from others who have run and failed? This is where you talk about the weaknesses of your opponent, the change in the mood of the voters (as proven by recent polls or newspaper analyses), or your commanding lead in fundraising. Whatever natural advantage you have--use it and play it, convincingly.

How many votes will it take you to win, and where will they come from? Most candidates have no clue as to how many votes they are looking for, but a crafty high donor knows that if someone on your team doesn't know the answer to this question, you probably haven't targeted your voters, and your campaign dollars will not be well spent.

Are you going to campaign full-time? Candidates that have a full-time job they are trying to hold onto as long as possible need to be able to show they have a campaign operation that can accommodate the candidate's hours away from the campaign trail. A candidate should plan on spending at least the last three months prior to the election campaigning full-time.

What's your message? Another trick question. This answer should not be limited to the slogan, but it should include it. Three practiced sentences will be fine. And no more than three issues should be mentioned.

All these questions are important in establishing a positive, insightful rapport with the prospect, but remember that the point is to get back to the subject at hand: raising money.

Remember that raising money is a process, it's not a courtship for marriage. Get to the point as soon as you can. Candidates often have a hard time getting to the point and as a result end up wasting their time--and more importantly, the time of the prospect. After all, you're calling people who give money to campaigns. They know the drill.

Some candidates start the asking process by sending a packet of information to a prospect. Then they phone the prospect and talk for a half hour. Instead of asking the question, they make arrangements for lunch. After the lunch (which the candidate wrongly pays for), still no direct pitch for money. They say they'll follow up with more information they will mail. Then they follow the mailed package with another phone call. Time spent: three hours. Money spent: \$20. Contributions received: \$0.

Get to the point. After you send a prospect a package, call. Follow the steps for asking for money. Ask. Ask again.

What's the Worst That Can Happen?

Anticipate in advance all the creative, stalling, and negative responses you might get in asking for money over the phone. Then have your own comeback ready for the debate. Some common negative responses from prospective donors include:

Prospect: "No, I'm supporting someone else."

Candidate: "I understand. In that case I would like to be your second choice."

Prospect: "No, I haven't got any money."

Candidate: "I know times are tough, which is why I'm not as interested in the amount as much as I'm interested in getting a check with your name at the bottom."

Prospect: "No, I haven't made up my mind yet."

Candidate: "I know how you feel, I've often felt that way myself. But I found that if I didn't invest early in good campaigns, then the best people wouldn't be the ones I'd be choosing among. I'm not asking for an exclusive endorsement here; I'm asking for enough money to build a viable campaign to get my message out. Will you help me?"

Prospect: “I can’t take a stand until my PAC (or company, boss, organization, spouse, or other entity) does.”

Candidate: “I know how you feel, I’ve felt that way too, but to compete now, I need to have 100 contributors. No matter what your PAC does, I’m sure they understand my dilemma. I’ve talked with your people and feel confident that they’re headed my way. However, if I don’t get help now, their endorsement may come too late.”

Prospect: “I don’t feel I know enough about you.”

Candidate: “I understand, and I’m willing to do what it takes to change that. Your contribution means a lot to me, to the point that I’m willing to head over to your office now to sit down and chat more. What I’m asking for is a contribution now to get this campaign off on the right track. You’re a seasoned political watchdog. You know some of my key endorsers (name them), you know some of my key staffers and consultants (name them), and you know what we share in common. Unfortunately, campaigns don’t allow for a lot of time to discuss the critical issues before candidates are ruled viable or not, based upon the money they have raised. All I’m asking for is a chance to compete.”

Prospect: “I need to talk to the others in the race first.”

Candidate: “I appreciate your democratic approach, but I’m hopeful that my initiative means something. I believe you to be an important bellwether. I realize the importance of early phoning, which is why I’m asking now, before my competitors. I’m not asking for your exclusive support, though I’m hoping to have it. What I know is that I need to have 150 contributors in the next 10 days to show the press and my competitors that I have the campaign that’s setting the agenda. I’d like your name and a check now to be able to compete.”

Prospect: “Send me some information and let me take a look.”

Candidate: “I’ll do better than that. If you’d be willing to write me a check today, I’ll bring some material over myself.” Or “I’ve sent you some material already, but if you’d like more, I’ll bring it to you. I’m so serious about having a check from you this week that I’ll stop by your house myself to pick it up.”

Prospect: “I’m contributing heavily to other campaigns on the ballot and don’t know if I’ll have money left for this race.”

Candidate: “I know how you feel. I’ve often felt that way myself when I looked at my checkbook and the causes I’ve supported. But I’ve found that these local races are just as important. If we don’t have people like me pounding the pavement and building those messages important to the whole slate, then the top of the ticket’s job will be harder. And I’m not asking for the maximum contribution, just \$100.”

Prospect: “I’m going to wait until filing deadline, or until the race heats up.”

Candidate: “By that time, this race could well be decided. Right now the campaigns that are able to get their messages out early are the ones whom the press, the endorsing organizations, and the public will consider viable. I’m running this race the right way: getting my money now, when we must begin talking to the voters. You know as well as I that the public is in a challenging mood. We need to talk to them now, not wait until filing deadline.”

The universal rule to take with you as the best comeback to any rejection, real or anticipated, is the “feel, felt, found” rule. If someone is about to reject you, say, “I know how you feel, I’ve felt that way myself, but I have found that ...”. Originally developed by Madalyn Schenk from New Orleans, it is the best tool to take with you to every solicitation occasion.

Dedicating The Time For High-Donor Fundraising

If you spend a little time raising money, you raise a little money. If you spend a lot of time raising it, you reap the benefits. Most campaigns incorrectly assume they don't raise enough money because of a candidate flaw, or because money has just run out in town.

In fact, money is not raised and campaigns are lost because the candidate, the campaign manager, the fundraiser, and the other staff members dedicate too little time to this most-important function of any campaign.

At least 25 percent of the candidate's time should be spent on the phone asking for money. Another 15 to 20 percent of her time should be spent asking for money in person, attending fundraisers, meeting with her finance committee, or urging others to raise money on her behalf.

Time should be scheduled for fundraising activities, particularly high-donor phone calls, before the rest of the schedule is set. The candidate, campaign manager, and scheduler should agree on the fundraising time goals for each month, and subsequently, each week. If the candidate is campaigning full-time, then up to 40 hours a week should be dedicated to fundraising activities. If a candidate is working a full-time job and also campaigning, then 25 percent of the available hours dedicated to campaigning should go to fundraising (about 15 hours a week).

It's important to break down your fundraising into bite-size pieces, rather than face the entire job at once, which can seem overwhelming, unreachable, and too daunting to begin on any particular day.

Hints For High-Donor Phoning

Send a packet to each prospective donor a week before you call. Explain that you will call on a particular day the next week, and include, with your personal letter of introduction, a brief bio or brochure and any positive press clippings. And, of course, don't forget a remittance envelope.

Work from high-donor forms that list the prospective donor's name, address, business address, both phone numbers, recent campaigns she has given to, and "additional notes," which record interesting information about the prospect. Be sure to record the prospect's response.

When leaving a message on the answering machine of a prospective donor, make it an intriguing one, not one asking for money. And always include the times you will be available. Try: "Hello, there, Sam Hunt. My name is Jill Smith, and I need some political advice. A mutual friend of ours, Jim Kirk, suggested I call you this weekend. Could you give me a call either tonight between 6 and 8 p.m. or tomorrow afternoon between 3 and 5 p.m.? Thanks, and I'll return the favor."

Or a more humorous approach: "Hi there. My name's Jill Smith and even though you might already know that I'm a candidate for City Council, please don't hold that against me. I need your advice, and no, I'm not just hustling for money, I need an answer to a few quick questions before I hustle you for money. Thanks."

Give yourself daily goals of how many people you will call, as opposed to calling until you reach a certain dollar total. To do an effective, high-donor campaign, you should have a list of at least five hundred names per month, or one hundred and fifty people a week to call. Have someone keep a tally of the money you've received through high-donor phoning to give you the positive feedback you need to keep on calling.

If a prospect does not call back after the first message, then call again the next day. If she does not call back after the second message, call the third day. Keep calling. Usually a prospective donor will respond to your persistence. If you have a mutual friend or contact that knows that person, have her call to see if she can encourage a return call to you.

Designate one person on the campaign to do nothing else but ready your phone list of prospects. A prospective donor who can see you have done your research on her will be far more interested in investing in you than a person who knows she is just a name on a list of previous donors.

Don't be discouraged. Always have a list of tough prospects interspersed with easy ones. Arrange your call list accordingly, so you take on the tougher calls at the start of your phone session and the easier ones at the close. This way, you feel successful at the end of the day.

The Finance Committee

Few people volunteer to be on campaign finance committees. Finance committee members are responsible for raising money, but seldom do they have input in how it is spent. They are given goals, but seldom any resources. Finance committees are told about strategy, but are rarely consulted about strategic decisions.

Finance committees are usually not well thought-out, nor do their members produce commensurate with the goals they are given. And for good reason--the roles of finance committees are seldom well explained to prospective members.

People who serve on finance committees are not substitutes for the candidate. They cannot call high donors and get the same response the candidate gets. However, members can help raise lots of money through many different mechanisms.

The campaign staff and the candidate should be available to work with finance committee members, either through dedicated time on the calendar or through staff support for the projects and backup required to follow up on work done by committee members.

No two finance committees are the same. Some meet at 7 a.m. every Monday morning to be briefed on campaign updates or to plan new approaches. Some work very independently, sharing lists and sponsoring events themselves. Still others never meet, with individual members bringing checks to the campaign office.

The best finance committees are the ones where members agree to bring in money the best way they know how. This includes:

- Giving the maximum contribution
- Getting another maximum contribution from their spouses or other family members
- Getting many checks from friends and colleagues and bringing them to a fundraiser or to the campaign office
- Hosting a fundraiser at their office, a restaurant or a private club
- Attending all important fundraisers and buying a table at some
- Introducing the candidate to other proven high donors
- Organizing conference calls among the candidate, prospective high donors and themselves
- Hosting a breakfast with several prospective donors
- Giving you access to a community group that may otherwise have been unreachable
- Organizing several people to give through the credit-card program
- Courting members of influential PAC boards to endorse the candidate
- Signing a letter to friends and political insiders urging them to send a check
- Sitting with the candidate as she makes calls to people known by the member
- Securing in-kind contributions (phone systems, fax machines, computers, etc.)

Finance committees need to be given their charge: to raise a specific amount of money, both as a whole unit and as individuals. At the first meeting, the treasurer and fundraiser should explain and hand out all pertinent legal information regarding campaign rules and regulations. A short card should be prepared to remind members of the dos and don'ts of legal fundraising.

Most campaigns start off on the right foot giving the finance committee pertinent information and ambitious goals. Then the campaign--pressed by other business--leaves the committee alone

to go its merry way. What happens then can be anyone's guess. If there is a good, self-starting organizer, or a committee member who has experience on the phone and leading similar operations with groups in the past, then there's a chance that some money will get raised.

However, a better plan is for the fundraising coordinator to serve as the staff member who speaks with each member of the finance committee at least once a week, offering information, supplies, and follow up where necessary.

The committee should meet to share and split up lists of prospective donors who should be amenable to a call for money. The fundraiser should also facilitate the scheduling of the candidate with finance committee members.

Generally speaking, both the candidate and the fundraiser work to add new members to the finance committee: it is the only committee on the campaign where there can never be too many people.

Political Action Committees (PACs)

Political Action Committees are the mainstay of big city hall and federal campaigns. PAC power, an outgrowth of campaign finance reform from the '60s, is a major part of today's political landscape. Groups, particularly labor unions or business associations, form "committees" to become entities that can give money, time, and energy to campaigns. Originally devised as a way to circumvent individual campaign contribution limits, PACs get their money from individual memberships or donations.

Labor unions frequently request deductions from their members' paychecks, whereas business PACs request sizeable donations each year depending upon the businesses' gross revenues from within the organization or even from outside organizations or individuals. PACs then have political directors, endorsement review boards, trainings, and recruitment projects. Their biggest job is to influence their voters on who would be a good choice for all the interests represented by the membership or its management.

PAC teams, loosely termed "member education" or "education committees," spend time and money influencing their membership and general voters--with campaign tools as sophisticated (or more sophisticated) than the candidate's own campaign.

PACs pay outright in the form of contributions to the candidate. They might pay for a poll or other big-ticket item, such as the production of a TV or radio spot. They could contribute volunteers or staff (a frequent contribution of environmentalists and social service groups), construction and placement of yard signs (firefighters and public safety PACs), phone banks (business and teacher PACs), sponsor several events around the district (trial lawyers, doctors and insurance companies), and magazine or newsletter mailings to the members (the National Rifle Association, gay organizations, women's groups, and many others). Still others will develop their own brochures, TV, or radio ads (such as the National Abortion Rights Action League and the AFL-CIO).

To avail yourself of the possible gold mine in help that these PACs offer, you need to know as much about them as possible.

- Know to whom they have contributed in the past, and what their average contribution to candidates like you has been
- Know who controls the money (the PAC director, coalition president, dominant business leaders, etc.)
- Know if there is a committee of members who interview the candidates before selecting a choice, then know the members on that committee
- Know who else that committee or PAC director bases their endorsement upon (Democrats are generally supported by labor, Republicans by business)
- Know when they make their choice and the extent of what they contribute besides money so that you can ask for maximum support

- Know people who know the important people so that you can be introduced to the important PAC people by the right folks

To quote an old friend, follow the money and you can follow the road that leads to PAC power anywhere in this country.

Small-Donor Fundraising: Direct Mail

Direct-mail fundraising is a strong core to any good fundraising plan. Candidates have lists of friends and relatives who should respond to a single letter with a check. However, for the rest of the people you target through direct-mail letters, it may take as many as five before you get your contribution.

Many campaigns don't understand the psyche of direct-mail donors. The truth is that the first mailing, if sent to a group of people who should be supportive of your candidacy, will only yield about a 4 percent return. That is, if you mail one thousand letters announcing your candidacy, you can expect about forty responses, with the average contribution about \$25. If you make enough money on that first mailing to cover your expenses, you are doing well.

However, if you follow up that mailing up with a phone call, and ask the prospects if they received the letter, your response rate will double to 8 percent.

After that first mailing, you're likely to be discouraged; don't be. Mail that same list again--making sure that you have made all address corrections, which you should request with any initial mailing. The second mailing should bring in more than your first, a 5 to 6 percent return. The third mailing will return about 7 percent, with the fourth and fifth securing even more, depending on how the race heats up.

Some candidates use a cost-effective means of thanking their donors and re-soliciting at the same time. Every time a donor contributes, she gets a thank-you and a new request for another donation.

Tips For A Small-Donor Solicitation

Make the outside envelope unique, not a dead giveaway that it's a political solicitation. Remember that insiders will receive forty to sixty requests a year. Put yours in a different-sized envelope. Put a teaser, in a color other than black, on the front, like, "the best news you'll get this year ..."

If you can afford it, have the letters hand-addressed. Some firms now specialize in hand-addressing envelopes for less than a penny apiece.

Long letters are better than short, one-page ones. Remember, these are going to insiders who actually look to see what you're saying and how you think you're going to win.

Include recent newspaper clippings, a brochure, a list of endorsers, an invitation to an upcoming event, or something else besides the letter and the obligatory remittance envelope.

Ask for money on every page. You should make at least a quarter of the copy of this letter asking for money. Repeat the need for money, the people who are already investing in you, and what the money will be spent on. And use a "PS" to again ask for money, in your most provocative pitch.

The signature should not look like it was printed at the same time as the rest of the letter. It should look as if you really signed it. Also, don't send out a letter that begins with "Dear Friend." You're asking for money. People take their money very personally. If you don't ask personally, you won't get it.

It's perfectly okay to write in the margins of your letter. You may underline or circle items. Anything that makes this letter look like you put some time and passion into it, as opposed to it looking like everyone else's letter, will improve your chances of getting a contribution.

The solicitation must sound real. Many requests for money are dry and hollow, or they spend way too much time discussing the true issues of the campaign. Of course substance is important, but these letters are going to people you know or who you know to be political insiders. Time is

better spent talking about the chances of you winning, or talking about the worst that could happen if your opponent wins, than discussing your eight-point transportation plan.

Don't forget to place the required disclaimer on your stationery and envelopes, and include in your letter information about maximum amounts the donor is allowed to contribute.

Direct mail is an important element to your fundraising, but it really becomes significant once you have a plan that delivers five and six pieces of mail to a prospect during the course of the campaign. The clue: get started early and mail often.

Credit-Cards, Web Sites And Online Giving

With all the ongoing changes in today's campaign laws limiting the power and financial influence of political action committees, there is a definite need to increase the number of smaller donors to your campaign. Small donors need not be defined as those who give between \$5 and \$50. They should be defined as those who give that amount at least once.

The goal of the campaign should be to move those donors from only one-time contributors to once-a-month donors. One of the most successful tools used in 1992 by hundreds of candidates throughout the country was to offer a credit-card program. This entails working with your bank and setting up the ability to receive funds through Visa or MasterCard credit cards. To the bank, your campaign looks like any other small business. When you become a credit-card merchant through the bank, you pay for the privilege of receiving Visa and MasterCard payments. You will pay a monthly fee to the bank for this service.

Although the charges will vary, most banks charge a yearly fee of around \$30. In addition, a monthly charge based on the average donation amount and the annual volume of contributions will be billed. This monthly rate should be no higher than 6.95 percent. For example, if a person donated \$25 a month for five months, her contribution to your campaign would be \$125, and the bank would charge up to 6.95 percent of that \$125, a total of only \$8.69.

It's worth it!

Some campaigns have found it effective to hold events where you pay a small fee to get in, and then sign up for the credit-card plan as part of the program. Others have sent out letters with pledge forms that look like a credit card. And, still others have taken the credit-card machine with them every place they go in order to maximize participation in the program.

If you begin by asking twelve of your friends to subscribe to the credit-card plan at \$25 a month, each of them ends up being a \$150 donor by the end of the campaign. In many cases, campaigns have been blessed with more than one hundred such donors, making their monthly intake from their credit-card program large enough to pay for all the standard bills that are due the first of the month.

Online Fundraising: The New Approach To Making A Buck

Like every aspect of campaigns, fundraising has dramatically changed with the advent and popularity of technology. Even five to ten years ago only large federal campaigns had online fundraising capabilities on the candidate's Web site. Times have changed very fast. Nowadays, all campaigns from local mayoral and state legislative seats to the large federal campaigns previously mentioned allow online donation.

There are three main reasons for the prevalence of online donating:

The increasing trend of low donors

How easy it is to donate online

The fact that everyone is doing it

Low donors are an increasing trend in campaign fundraising. A candidate can depend on her base supporters to turn out with large checks. However, there is real money to be made in the hundreds or thousands of low donor donations received. The key is to make it as easy as possible

to receive this money. Of course, the easiest way to receive donations (especially low donor donations) is by credit-card.

Setting up the capability to accept donations is easy and fast (as explained in Chapter 9, Technology). Moreover, it will pay for the design and functioning of your Web site and much more. Studies have shown that low donors overwhelmingly donate out of impulse rather than a long-standing devotion to the candidate or campaign. It is highly unlikely that most donors will want to donate, look up the Web site, and then remember to write a check later that day or week. It is therefore necessary to capture this moment and allow these people to donate on the spot.

Online fundraising will also make it easier for your high (and low) donors to donate more. Let's face it; it is just easier to spend money on credit-cards! Most donors will end up giving you much more from a credit-card than a check or cash. This is true for both high and low donors. Low donors will also give more than once with online fundraising accounts.

Finally, using credit-cards is just plain popular and sophisticated. Most donors will go to the Web site to research how to donate and furthermore, these donors will expect to be able to donate online. If you do not have an online fundraising account you are at the risk of looking less than sophisticated. High donors will very much appreciate the availability of this feature.

If you want to increase your donations by 20 percent or more, remember to set up an online account!

Events

Beware the event that requires a thousand details for a \$300 profit. Today's campaigns are learning that fundraising events are usually good for bringing people together and building important visibility, but are not as productive as high-donor phoning when it comes to adding to the checking account.

There are several different kinds of events you might consider, each with its own time frame:

- **Auctions, celebrity speaker events**, and multiple events on the same night (fifty home parties for \$50 each) all take at least two months of planning if you're going to do them right.
- **Kickoff events** where you hope to attract hundreds of people to announce the start of your campaign. These should be planned six to eight weeks in advance.
- **A spaghetti or chili dinner**, potluck, or picnic takes a month to five weeks to organize, follow up, and rally lots of people to attend.
- **A high-donor dinner** in a private home or an exclusive club should take three to four weeks to organize and secure people who will attend.
- **A coffee klatch** or wine-and-cheese hour takes three weeks to organize from the moment the host or hostess is secured.
- **Selected breakfasts** with members of the finance committee can be organized in less than a week, as long as the finance committee member agrees to shoulder the responsibility for accomplishing the work.

Large Populist Events

From the kickoff breakfast to the chili feed, from the art auction to the fun run and picnic, from the spaghetti feed to the evening at a movie theater, these populist events have a way of getting out of hand very easily.

The good news: These events allow for people of any income level to attend. They provide an opportunity to use your volunteers. They raise needed visibility. They can bring in lots of new small donors. They give the candidate a feeling of leading a real team. They build momentum.

The bad news: They require lots of time, and usually the time that should be spent hustling people to attend is spent organizing the decorations, the food and alcohol, and other details of the

event itself. These events also have a way of slipping on the schedule, with the all-important get-out-the-folks-to-attend phone calls waiting until it's too late.

Large-scale events require lots of organized people--not just the ones who will come to a meeting once every week to "strategize" the event. They also require some up front money to secure locations, pay deposits on food and entertainment, and they require a lot of follow up effort (phone banks, mailing parties, program design, etc.).

For any event that will involve getting hundreds of people to attend, you will need to engage an events committee to get you through the detail work that these entail.

The Events Committee

A good events committee:

- Has a chair who is ruthless about deadlines, agendas and holding people to commitments to do work
- Meets occasionally, but meetings are not the focus of the committee: the work gets done and people check in with accomplishments and a request for additional assignments
- Outlines each person's duties in writing so that specific duties are the responsibility of someone other than "the committee."
- Has a checklist of all the important tasks that must be done
- Has a budget that has been approved by the campaign manager and/or the fundraiser
- Checks the community calendar to make sure the planned events are not in conflict with other important events
- Keeps in touch with other members of the campaign team so that if an event is being planned at the same time that yard signs are being placed around town, the two interests can work together
- Is filled with fun, energetic people of all ages who can bring new perspectives to the event

Setting Event Limits And Goals

Events can get out of hand in days (usually the days immediately prior to the event). You need to establish a goal for each event. Large populist events should raise at least \$5,000, whereas your coffee klatches and small meetings should bring in at least \$500. For large events, you should ask for money to get in. For small meetings, you ask for money before you allow anyone to get out. The approach and amounts may be different, but the goal is the same: fundraising for your efforts.

Each fundraising event should have at least one goal: breaking even or making money. Unfortunately, campaigns are filled with fundraisers that were lots of fun, but they cost so much the campaign had to pay out more than it brought in.

Tips for Successful Event Fundraising

Get sponsors for every major event. These sponsors should be secured in time to have their names on the invitations.

Send out a remittance envelope with every invitation.

Follow up every mailing with phone banks before the event.

Have at least a dozen table captains or sponsors for an event. Each of them will bring another five to ten people to the event.

Have someone not on the events committee oversee the checklist for each event.

Be sure you have obtained the proper licenses or permits for the event, including police or parking permits, insurance permits, liquor licenses, etc. If you are offering daycare services, make sure the people working are certified daycare workers.

Make sure someone is singularly responsible for ensuring that no one under the legal age drinks, and that no one leaves who is legally drunk.

Have the event at a location that is accessible, so that everyone can attend and no one can complain or accuse you of being insensitive to the issues of the physically challenged.

If you have an outdoor event, then have a back-up plan in case of bad weather.

If the event is to be held in a private home, send a campaign worker, preferably someone from that neighborhood, around to all the houses in the area the night before to let them know what's going on and to invite them to attend.

Budget for each event early and set the fundraising goal for the event to cover all event expenses plus a profit high enough to make all the effort worthwhile.

Make sure you take all the necessary campaign supplies to the event.

Always include directions and a phone number on the invitation, even if the event is located at the most popular hotel in town. Make sure you note where people can park.

Have as many members of the finance committee there as possible, so that they can work the crowd, talk to and mingle with possible high donors.

Make sure the campaign treasurer or someone who knows the fine details of campaign finance regulations is there to answer any questions about contributions.

The Importance Of Thank You's

Much ado is made by candidates about the thank you letters which follow a contribution to the campaign. In fact, failure to respond to contributors with a timely thank-you note is among the top beefs that candidates have with their staffs. Some believe that a timely thank you gets you a better chance at an additional donation. Some staffers believe that a thank-you doesn't matter and should be left on the list of last things to do.

Thanking a high donor should be a obvious. Acknowledgment of a maximum donation should be timely and personal, with the candidate's signature or even a phone call, if the donation came unsolicited.

Thank you's to low donors should also be timely. Any good campaign computer program today includes a mail-merge feature for easily tracking donations and sending thank-you letters. With each thank-you letter, include another remittance envelope and ask if the donor could find another person to match her contribution.

General Rules For Raising Money:

You need to spend money in order to raise it. Budget for events, mailings and phone banks so that you can do them right. Volunteers are much more attracted to campaigns that look good and can afford to look better than the competition. This does not mean that a lot of money need be spent, but it does mean making your materials look sharp.

Money comes in commensurate with the amount of time you spend raising it. There is no limit to what you can raise. There is only a limit to your patience. Conquer it and you can raise the money that will help you win.

Do your homework and know how much a prospective donor can afford to give you based on their past giving experience. Always ask for a specific amount of money, and then be quiet. Let the prospective donor break the silence.

Always send out an invitation to an event or a fundraising letter with a return, self-addressed remittance envelope.

No one wants to give you money. You must ask for it. Ask again and again, and never exclude anyone. Train everyone on your staff, your volunteers and even your family how to ask for money.

Keep a running total of what you have raised. Break out goals for each day, week and month so that the high-donor fundraising is manageable.

Don't let a pledge become a deadbeat donor. If a person hasn't sent in the money he pledged after a week, call him back and say you're going to be in the neighborhood that day and will stop by.

Learn how to fundraise effectively, don't just accept it as a hated chore. Have experienced people with you as you begin regular high-donor phoning so that you might learn how to do it well from the start

Don't make fundraising the last thing on your list of things to do each day; make it the first or you'll never get to it.

Ask for money everywhere you go. Have a cellular phone for high-donor phoning in your car. Have an extra phone line installed in your home. Secure a phone just for you in the campaign office. And, phone every chance you get. Remember to carry an extra battery or two for your cell phone.

Phone from pay phones during breaks when you're on a radio program. If people see you phoning for bucks, they'll be more willing to give you money, or at least talk about how determined you are at doing the most important job of any candidate.

Have fun. There's a reason they call it FUNdraising. If you're not having fun doing it, others won't have fun giving it, nor will they help you raise it.

Chapter 9

Technology

The impact of technology on our daily lives is everywhere, so it is little wonder that technology has revolutionized the campaign world in less than a decade. Not only are campaigns easier to organize and strategize, but the promise of online campaigning to voters (especially young voters) may drop the cost of campaigning dramatically, making it easier for people with less means to run.

The major reason we are revising this campaign manual--now 15 years old--is because of the profound effect technology has on the efficiency and day to day operations of campaigns. Technology is not a fad; it's not going anywhere anytime soon. Indeed, it has completely revolutionized how people communicate, obtain and use information. In order to run an effective campaign and be looked upon as a credible candidate, you must utilize technology to the highest extent your campaign staff can handle.

Getting into the groove of technology takes dedication, patience and professionalism. We need to go into this world of technology cautiously and realistically. We cannot say, look at this neat stuff, now let's do it. We have to make computers, technology and new processes work. But to do this we need to start with changing perceptions of technology. You can't buy a new program and expect to start using it within the next month. It takes time, knowing how to talk with vendors, and starting slow. More computer programs and technological innovations are purchased and sit there waiting for a computer guru to come in and use it.

Just a look at the innovative uses of technology in this past presidential election cycle gives you an overview of what practical and sophisticated technology applications helped women win in 2004:

- Cell phones and Blackberry hand-held computers mean the candidate is reachable all the time; she can make those high donor calls while her campaign manager drives the car to the scheduled debate. Special car computer programs get the right directions to the event, reducing the chances of the candidate being late;
- New phone bank locations were unnecessary. Everyone just shows up to the campaign office for phoning with their cell phones. In fact, some campaigns strapped for volunteers give their trusty team members a free cell phone for local use if they dedicate a few days to walking door-to-door;
- A state of the art laptop computer that goes wireless can show all attendees at a home fundraiser what those new TV spots will look like;
- Canvassers walking door to door in search of supporters can record the info on personal computers (PDA's) making evening reports available to the strategic team within minutes of the last survey's completion;
- Web sites allow campaigns to attract new endorsers and donors by simply posting their information on the worldwide web; indeed, campaigns often report pulling a photo off their opponent's web site for attack pieces.

Campaign technology just 15 years ago was limited to copy machines, pagers, and perhaps a few computers borrowed from local businesses to organize data bases and handle a merged mailing to all the names on the list. Now there isn't an aspect of the campaign that doesn't rely on at least some technology.

Your job as the candidate or campaign manager is to know how technology--and how much--will work in your day to day strategy. It is estimated that up to 10 percent of your campaign costs will be tied to technological improvements. However, be cautious of what you buy. The main problem of today's growing list of technology improvements is handling what you have just

bought. The software, hardware and staff commitments to accomplish all you want may not be practical. The goal is to aim high, but insure that you can do the basics.

Harnessing Technology For Your Campaign

The opportunities for using the computer world to help you win a campaign grow daily. There are now more than fifty different programs that you can buy to help you work more efficiently in all aspects of your campaign. They range from \$100 for general data base management programs to \$5,500 for a comprehensive central program through which you can do many campaign tasks.

What you can do and what you will do usually depends on four important factors:

- Who will be the person(s) to operate or be in charge of campaign chores the use specific technology
- What kind of hardware and software will you need to accomplish the basic tasks you want handled by the technology
- What will it cost in time and money to commit to these computer applications
- Who will we call if our computer person or system is in trouble and how long will it take to respond

No campaign should be looking at buying a comprehensive program if they have few people who are comfortable working with computer systems. A campaign is not the time for on the job training for complicated programs.

Technology 101

In the initial phases of the campaign, you should make your list of the first things you need to do and the pieces of technology that every campaign will require. And when it comes to the basics of a computer and Internet access, there are simple tasks to accomplish.

- Cell phones: the candidate may even have two (one for the press and one for the campaign. Cell phones now allow you to become a virtual office no matter where you are. Low budget campaigns simply get their campaign manager a cell phone and no matter where the manager goes, she can always answer the phone as if she were in a campaign office.
- Handheld computers (PDA's, Trio's or Blackberry's): these handheld computers allow you to get e-mails on location which means immediate access to information, strategy, news, polls or key people you must reach.
- Computers and software that can handle three critical chores every campaign should rely upon technology to accomplish.
- Treasury: First and foremost, the person in charge of collecting the checks, copying them, recording them, depositing them and declaring them for public disclosure purposes must have a computer and program that accomplishes this. The Treasurer should also establish the budget process for paying bills, writing the checks and recording the expenditures.
- Database Management: Managing the names, addresses, e-mails, phone numbers and other information of the people who are likely financial donors, volunteers, endorsers, the media and others – this is a huge job which requires a penchant for detail. You will want to merge new lists of people into your base lists, editing duplications and cleaning up

errors. Sloppy database management means prospects get three invitations to your event which makes the entire campaign look amateur.

- **Scheduling:** The days of filling out forms for candidate events and home parties are over: today we schedule online with simple software you can purchase with basic word processing programs. The new programs allow us to enter information once – or better yet, have the requesting party enter the directions and information once – and have it recorded for the level of campaign access appropriate. The directions to events are only a click away from online map companies, eliminating hours of frustration for candidates trying to find where they are supposed to be;
- **Internet Access:** The information now available to campaigns online has dramatically improved the level and amount of accurate research available to campaigns within minutes. News accounts of the campaign can be accessed as soon as newspapers update their web sites nightly – long before the newspaper ever hits the streets. Opposition research on the voting records of your opponent can be accessed through public files, and every letter he has ever written can be “Googled” (the program search engine that locates people and subjects by name). The Internet allows us to organize our volunteers and makes it easier for a call to action with one simple touch of the “send” button on our e-mail messages.
- **Computers** for every paid staff member and at least one or two for the volunteers to use are a must, though many campaigns hire managers, fundraisers, and media coordinators with the proviso that they supply their own cell phone and computers.

Impact Of The Internet On Campaigns

It is estimated that over 159 million Americans use the Internet for a variety of tasks including E-mail, receive news, buy items, inquire and almost every other imaginable application--it has enhanced social relations. This is a 37 percent increase in Internet usage from 2000. The percent change of Americans that turned to the Internet to receive news increased 16 percent from 2000.

There is no denying that people turn to the Internet for information and as the accessibility and its capabilities to exchange funds becomes faster and more secure, it is very possible that the Internet will emerge as the major political battlefield. Not to mention the small costs associated with hosting a Web site and fundraising. Traditional television and print ad shadow the minimal costs of the Internet. The profit margin that successful online fundraising can produce can be incredibly worthwhile. The Internet is a new tool that also allows reluctant candidates to make a first introduction online before calling a prospect on the phone.

Web sites have emerged as a standard for most institutions and businesses with politics being no exception. Web sites are now as prevalent as yard signs. The individual advantages of Web sites, Internet fundraising, databases and technological innovations associated with maintaining lists are the first things you must conquer and assign in your campaign, and then the lure of voter contact online becomes a possibility.

As politics evolves and voters become more skeptical about mass media--messaging, outreach and overall strategy will adapt to the Internet.

The Importance Of A Web Site

A Web site establishes credibility and, for a minimal cost, gets your message out to the public. As the public becomes more dependent on the Internet, politics is shifting to accommodate the web community.

Web sites are easily developed and immediately establish a campaign as a convincing selection. An effective Web site will inform voters on issues, give background, encompass the campaign message and if needed, give supporters the opportunity to donate. For all types of elections no matter the size, a Web site is recommended even if the primary reason is to appear like an official candidate.

Web sites are crucial because they are so versatile and serve so many various purposes, including:

- Messaging
- Communication
- Credibility
- Fundraising
- Press
- Endorsement interviews
- Bragging: press clips/endorsement list
- Event promotion

Having a Web site is nonnegotiable because the benefits are so comprehensive. More importantly, it is a noticeable omission from a campaign. Without a Web site you as a candidate and your campaign will look unsophisticated, far from credible, and a long shot to win the election. In today's technological world, you must always invest in a Web site!

What Should A Web Site Contain?

Depending on the size of a campaign, and the competency of your computer-friendly team members, a Web site should be developed according to the skills you have – not those you have to learn. The larger the campaign and more sophisticated its team, the more elaborate and functional the Web site should be. For example, if a candidate is running for state legislature or is a mayor in a small town, Web sites should convey the facts – the who, what, where and when of the campaign.

On the other hand, if a candidate is running for the U.S. Senate, or any statewide position, a Web site should accommodate the grand scope and all functional capabilities. For a highly contested up-ballot election, Web sites should be used for fundraising, voter outreach, and merging many voter databases. It should be easy to download campaign material and should be updated daily – on top of the who, what, where and when of day to day campaign strategies.

However large or small your campaign and prospective target audience, your Web site should contain some basic components. As is the case with all campaign material, components must be clearly written and aesthetically appealing. As with other voter contact rules, white space is important – do not fill every space with words.

When designing and organizing a Web site it's important to weigh the scale of the campaign. Ask yourself, "What role will the site play on the election?" For smaller races, the Web site will merely create campaign credibility and visibility. In this situation, keep the Web site simple and convey the campaign's issues, a profile of the candidate or initiative, endorsements, upcoming events, Bio's if appropriate and contact information. This covers all the aspects of a simple site. For major campaigns – by all means – the site should have the works. For major elections, a full-time webmaster is advisable. This person should be in charge of the daily maintenance of the site, updating it regularly, monitoring the funds raised, and making sure every page is in working order. For a Web site, there is nothing worse than a broken link or page – throw credibility out the door. The site should be a living object that tunes to supporters and detractors that visit the site each day.

No matter the size of the campaign and the site, a few basic guidelines for Web site design and content do apply. Keep in mind that larger campaigns need more elaborate design and content. Simple Web sites cost from \$1,500 to \$2,500.

A Web site should include a minimum of seven basic pages:

- **Home page:** A home page should include a great photo of the candidate, preferably not just a headshot. It would include a brief explanation of why you as a candidate are running for office. This could be in the form of a letter and should include at least three bullet points highlighting your priorities.
- **Biography:** The biography page should include personal and professional experience about you as a candidate. Who are you? What is your family like? What makes you qualified to win this election and serve in this position?
- **Core Issues & Values:** The core issues and values page should contain your issues. What are you running on? What is your message? The information should be bulleted and easy to read and understand. Know that many reporters/organizations will go to this page prior to interviewing you.
- **Press:** The press page is important and needs to be updated regularly. This page contains links and brief descriptions of all of your recent press clips. Be strategic about what to include here.
- **Endorsements:** The endorsement page contains all of your endorsements from individuals, organizations, unions, newspapers etc. This page should be updated regularly. You can also put a notice on the front page announcing new endorsements.
- **Get Involved:** The get involved page is crucial. This is where you list all of your campaign events and ask people to volunteer. You can include an online form for people to fill in to RSVP for events and/or volunteer for activities.
- **Donate:** The donate page is important. It should contain a 'pitch' explaining why your campaign needs money. It should also contain a link to PayPal or Verisign or whatever financial company you use. (PayPal or Verisign are companies that pre-screen your credit cards so the bank can feel safe immediately transferring the donation to your campaign coffers). Regardless of whether you have one of these services, always make sure you accept Visa and Mastercard.

A Little On Design

It's important to work closely with your web developer and graphic designer. There are some important guidelines to creating an effective Web site. A traditional Web site will either have a navigation bar flush left or run across the top with a system of staggered tabs. It's better to go with what people know. The point here is to get the information across – so keep it simple. When it comes to cost, a good rule of thumb is \$70 per hour. Now, most web developers can build a page an hour. But, before you begin the actual scripting, the concept – the look – must be developed. Your designer will work closely with you to soften a site's color scheme, touch-up photographs and create a credible look. Then, the Web scripter can put the nuts and bolts together.

Always remember:

Internet users have a short attention span.

If something appears too complicated or loads too slow, they will leave. So for all intensive purposes, restrain from using Flash applications. As nice as it can be, you want to be kind to your dial-up users and maintain a quick load. With that in mind, use white space to soften content, especially on the homepage. A homepage is the first thing a user sees, its needs to be inviting. Never clutter it with excessive information, rather make it an appealing entry way into the site. As someone links deeper into your site, they will read what's important to them, not what you think is – So organize your ideas and clearly navigate the site for them.

Basic rules of designing a Web site:

- Web sites should be clean and uncluttered. When in doubt, cut it out.

- People look at photos. Include as many flattering photos as possible.
- Always remember that people do NOT scroll down, therefore keep your information at a minimum and your important points on the top of the page.
- Each page should contain the campaign's logo and the basic information about the campaign (address, phone number, email address).
- Don't forget the 'Paid for by' at the bottom of the page.
- Web site designers average \$70 per hour.
- Don't forget that all Internet users have a short attention span.

Donating Online

These days, donating online is a must for *every* campaign (see Chapter 8, Fundraising). Even in smaller campaigns, online donation will most definitely pay for the design and functioning of your Web site and much more. It will harness those low donors by giving them the option to pay a small amount by credit card only once or at a regular date each month.

Online donation should be easy. The greatest thing about online donation is that it captures a donor's impulse. If you make the donation process too difficult you will lose that donor's money at that moment and the opportunity for future donations.

Don't forget to make it fast and easy!

There are many different companies you can use to receive online donations. PayPal is great for smaller campaigns with a budget under \$200,000. For larger budgets, you will need a more elaborate system. Verisign is another popular alternative for larger campaigns. The next section will discuss logistics.

Online Fundraising Logistics

When a campaign is taking its first steps in understanding online fundraising logistics it is important to appreciate the cost and benefits associated. There is no cap on how much can be raised, but there are hard costs and overhead associated. At the low-end, setting up online fundraising capabilities can cost between \$500 to \$1000. This cost can be built into the total cost for building an entire Web site or be incorporated later. These costs would cover the hours involved integrating an interface and complementing the site's overall design. At the high-end, a seamless Web site with full 'shopping cart' capabilities can cost in excess of \$2000. A good example of a high-end check out system would be Amazon.com.

There are different ways to complete and set-up online transactions on a Web site. The simplest, cheapest way is to use a middleman service like PayPal. From the Web site a user clicks either a button or completes an informational field that would redirect them to PayPal for the final transaction. PayPal deducts a small percentage of all funds raised. Some other similar services charge monthly fees to use the service.

Banks can also perform this same transactional service. A campaign can use a business account to set up a link that can be used to complete an online donation. From your site, just like PayPal a user would be redirected to the bank's Web site to complete the transaction. Some might like this to add a sense of security for the user. Most of these services have safeguards and insurance to protect from potential hackers.

Any online transaction is encrypted to protect users and the host site from scams. On the same note, most credit cards are protected from Internet fraud and all credit card information is usually kept on an offline server that cannot be accessed.

As discussed earlier, for elaborate, seamless Web sites, a fully functional checkout system can be created. This is the most sophisticated and also the most costly way to take donations. Here, your site will perform the tasks middlemen services provide. The initial set-up costs are considerably more, but the advantage is creating a completely unique site with added appeal and credibility.

Updating And Advertising Your Site

As issues arise, the Web site will become the first opportunity to communicate with supporters, organizations, and the media. Since these groups will often turn to the Web site for news about the campaign, the Web site needs to be updated. Remember this is your way to communicate to hundreds or thousands of voters. Essentially, this is your chance to advertise your way, cheaply.

Never miss an opportunity to promote your candidacy!

For smaller campaigns, you should update your Web site each time you have a new event, endorsement, or story in the paper. For all elections, fundraising and voter mobilization elements of the site are so important and **MUST** be updated. It is crucial that campaigns incorporate new software and Internet tools that facilitate all campaign endeavors.

Once the Web site is up and running, it is crucial to get the word out. That means advertising online and spreading the URL name – that's the Web site's address. Advertising online will maximize your return on investment and reach the desired publics. There are many ways to go about advertising online, but it is best to contact a company that specializes in this. Using efficiently placed banner ads, unobtrusive e-mails and even comical applications – like a cartoon, Web advertising has become specific and productive. If advertising is within the budget, it is worth the investment because it will translate into voter contact.

Voter Contact Online

No doubt the greatest threshold for the Internet and campaigns is the ability to campaign to individual targeted voters online. Campaigns & Elections Magazine lists over twenty political campaign programs dedicated to reaching voters. Most are programs that allow your friends and supporters to email their friends and address books with a message designed by the campaign.

You receive an email from the campaign which asks you to email it to the people for whom you have emails, but you first add a personal note. You blast the email to your friends, and for anyone who opens the email the campaign is notified of that person's email, allowing you to add a prospective friend to your e-mail data base. At least you then have the ability to send messages directly to that friend of the campaign friend. And if that friend has an address book, the same feature applies and our lists grow geometrically.

One of the greatest examples last year was the blasting of humorous videos which showed you a ballot from Florida and how hard it was for people there to vote for the Democratic presidential candidate. Every time someone tried to mark the ballot for John Kerry, the ballot would register George Bush. This video game/message was blasted to over eight million voters in the last four weeks of the campaign.

Other opportunities to use the Internet for voter contact comes in the form of blasting video spots for the growing audiences that can open emails with video or audio messages attached. Often political action committees and special interests who have amassed email addresses for years are now waging major negative campaigns online. If you are supported by teachers and your opponent has a lousy record for voting on education matters, you should expect colorful endorsement pieces touting your positives and equally colorful pieces detailing the negatives of your opponent. All the teachers, and teacher-friendly families, are likely to be sent these sophisticated missives online.

Still other opportunities to reach voters online come from acquiring email lists. Email list vendors are registered all over the country, and although their lists are not as reliable as phone lists maintained by the large telephone companies, they are growing more accurate with each passing election. Most campaigns are likely to build their own "friends" list through supportive groups, volunteers, donors, going door to door and phoning voters for get out the vote efforts. Though the email addresses change faster than telephone addresses, making them obsolete before Election Day comes, they are the fastest growing resource a campaign has. Every time

you convert a prospective targeted voter to your email list, you can increase the number of times you reach that targeted voter and reduce the per voter cost.

Desk Top Publishing Programs

Among the most useful technological improvements has been the practical advancement of desk top publishing for the common folk. Desk top publishing is the code phrase that allows you to make very professional-looking materials right in the confines of your own campaign headquarters. Personalized materials for the union crowd in front of whom you are speaking tonight are much more effective than the more generalized brochure that was developed for all voters.

If you have a professional template designed (a boilerplate design that already has a photo, logo graphics, a scanned newspaper story, the list of donors), the local office staff can change a headline or some of the copy to tailor the material to the labor audience. You can add and subtract endorsers as new people add their support to your campaign.

Some Other Exciting Technology Advances

In targeting: now you can put your entire data base of your electoral district through programs that allow you to sort according to seventy or more different categories. This means you can mail to young, new Latino women voters who live in proximity to a University, have an income under \$30,000 and are pro-choice. This is critical when paired with good polling, and especially important if the money runs out. Your polling tells you that a pro-choice message might not work with older Latino voters but it does with higher-educated, younger women.

In fundraising: imagine sitting in front of a computer that is already programmed with one hundred people likely to give you money. The program has already taken the high donors of several campaigns of women candidates or local progressive men, and turned them into forms which appear on a screen in front of a woman candidate about to do her high donor phoning. The program allows for a letter to be sent out a week before the candidate was to phone, alerting the prospect that she would call between four and five on a specific day. In many cases, the prospects call with adjusted dates and times to respond. Also, for less than \$30 a month, you can employ services which allow you to conference call for a mini-fundraiser. This means a candidate, a Caucus member, two or three prospects of a like background can be on the same phone call to raise money.

In volunteer management: for less than \$400 you can purchase a “phone tree” machine which allows you to record the candidate or the campaign manager’s voice giving an update to volunteers and campaign supporters each week. The machine dials the numbers of up to five hundred people and plays the pre-recorded message. In most cases, the pre-recorded message is re-recorded on volunteers telephone answering machine, giving the impression that the candidate actually called. With some machines, they pick up and re-route a call from someone who actually is there.

In TV technology: a new editing machine allows for quick responses to attacks from your opponent, allowing you to do quality responses within hours.

In scheduling: new programs allow you to track incoming invitations, mount them on one relational database so that a schedule can be printed for just the press, the candidate’s family, the office staff, or other specific needs. This programming allows you to superimpose where your targeted voters live so that you might prioritize your scheduling.

Technology Campaign Fairs: at partisan party conventions as well as national conferences of the American Association of Political Consultants and Campaign & Elections Magazine, there are dozens of computer technology programs and services that are breaking new ground and reducing the costs of campaigning. You would visit their web sites, attend a conference or access their materials for the state of the art of political campaign technology improvements that suit the talent level of your campaign team.

Confidentiality

There are many facets of technology, but the primary use is for communication. With the rise and widespread use of technology, it is important to consider confidentiality of communication. Remember that any email you receive could have more recipients copied on the same email without your knowledge. Also remember that any file you send can be easily forwarded to anyone in seconds.

With the rise of technology and the ease of communication, it is difficult to prevent all confidentiality breaches. Like it or not, it will happen. However, if you keep in mind a few tips listed below you could prevent a large information leak from happening.

There are a few tips to keep in mind with technology:

- With anything in politics, know whom to trust.
- Remember writing is a *completely* different medium than speaking. Always be careful what you write: it can be saved and transmitted. And used against you.
- Always label confidential documents 'Confidential' with a header or footer.
- Do not email any document you consider confidential. Give out hard copies.
- When giving out hard copies you can track the copy by putting small and distinctive typos to different people. This way, if something is leaked to the press, you can ask for the copy and determine who leaked it.

Chapter 10

Scheduling

The Basics Of Campaign Time Management

More valuable time is lost in a campaign because the candidate is doing what she is asked to do on the spur of the moment. Frequently, the candidate responds to every request to attend an event and allows anyone and everyone else in the campaign chain of command to dictate what she should be doing.

Careful, deliberate scheduling is the secret to using the best and most finite resource of the campaign: the candidate's time. You will need to set the formula for strong schedule management early in the campaign: when the actual routines and standard practice begins.

The goal of every campaign is to maximize the highest and the best use of each person's time. For example, the campaign manager handles the day-to-day operations of the campaign. She talks with media producers, pollsters, printers, the volunteer coordinator and her other coordinators. The candidate, on the other hand, should not do the jobs that are best delegated to other workers. She works on fundraising, voter contact, public appearances, issue development and campaign briefings with her consultant and manager.

The Scheduler

In the initial team-building stage of the campaign (usually the first three months), there are seldom enough bodies to handle all the responsibilities; everyone works on tasks that will hopefully be assigned to someone else. Also, in the beginning, candidates have a hard time entrusting simple projects to those down the chain of command. To the extent that the scheduler is among the first aboard, she can help focus the candidate on key priorities and using her time wisely. Bad habits are set into standard operating procedure within days, so the sooner the scheduler takes charge of the candidate's pace, the better.

One important note about the scheduler/candidate relationship: since there are hundreds of details which are required to make a schedule run smoothly, the candidate and the scheduler need to trust that both are doing the best job they can (given the impossibility of the job). Tolerance, patience, the ability to forgive omissions and small mistakes (as long as the same mistakes aren't made often), as well as supportive feedback are necessary for both the candidate and scheduler to give each other.

More day-to-day stress in a campaign surrounds the schedule than anything else. If someone trustworthy gives the scheduler a bad set of instructions, the wrong time or an overstated view of an event, the poor scheduler takes the rap.

Characteristics of an effective scheduler include being extremely good with details, very well-organized, able to distinguish priorities in a long list of things to do, tactful and affable, but not easily talked into other people's priorities. A good scheduler is always asking questions, and she writes down every detail (none of this "I'll remember this note").

Corresponding kinds of jobs which translate as good experience for a scheduler include former office managers, accountants, bookkeepers, travel agents, mothers of little children and people trying to manage a full-time job while going to school. Jobs that require endless details and quick, good judgments are traditionally good prospects for a scheduler.

The scheduler needs to be able to talk the candidate onto the podium of an event, as well as compassionate enough to cancel an appearance politely but firmly when the candidate has to attend a higher priority event. She also needs to anticipate everything that might go wrong with the schedule (traffic jams, last minute changes, candidates' exhaustion, energy level, etc.) and plan accordingly.

There are other characteristics that can be bonuses to find in a scheduler: an ability to see press potential in events and a never-say-die attitude about getting her candidate into meetings where candidates are usually excluded.

The job of a scheduler is a many-faceted one with most of the most important tasks being a matter of persistence and organization. Her job is to:

- Receive, inventory, evaluate and answer all invitations
- Keep the candidate on track with an agreed upon formula for how her time should be spent
- Seek out invitations to meet with people, organizations and special interest groups
- Get all the details concerning each event (and get them right)
- Arrange briefings for the candidate prior to each event
- Advise the candidate on the attire that she should wear
- Arrange for transportation to and from each scheduled meeting
- Keep the master schedule and update it
- Make sure the candidate's family knows her schedule
- Brief the candidate on daily changes with the schedule
- Watch for press opportunities
- Arrange for the advance work so that the candidate will arrive at an event with all the appropriate flyers, posters, brochures already set up
- Ask appropriate people to accompany the candidate

Equipment To Get The Job Done

In all campaigns, cell phones make scheduling frustrating. The addition of Blackberry equipment (a combination of phone, computer and Internet access in one small hand-held device), as well as other advanced cell phone/text messaging equipment, means that a candidate has an immediate connection back to the scheduler. The scheduler still should have a daily briefing with the candidate to go over the day's schedule either early in the morning or late at night traditionally works best.

All schedules in a campaign should be on a central computer. Even the simplest word processing program (Microsoft's Outlook) will allow you to record all the important data you will be receiving about upcoming events, and then place it directly into the central computerized schedule. Each time you have to recopy the details, the chances of making a mistake with the information you are given increases. Computers minimize the number of times you must recopy specific information. Keep the originals of all the information you receive in paper files just for back-up. The scheduler should always leave the most recent hard copy of the calendar on her desk. All schedules should have a date and time posted on them so all using it know which calendar is most current. Some schedules near the end of the campaign could be updated several times a day.

There are scores of different programs to be used for your official schedule. Some allow for secured access to changes, additions or subtractions of information. Still others allow for daily, weekly and monthly access to information. Most often scheduling software for campaigns is included in major campaign programs that also coordinate fundraising, voter contact and campaign reporting tasks.

Different Types Of Schedules Include:

- Schedules for the candidate which have the critical information regarding time, date, places and people with whom she's meeting and other briefing notes.

- Schedules for the driver which will include precise directions and other advance information such as who's meeting the candidate at the door, who's setting out the brochures, etc
- Schedule for the press which outlines the important public events and other campaign items which you want the press to know about (personal fundraising meetings or private appointments are not on this schedule).
- Schedule for campaign activities. This will be directed towards the campaign staff members and volunteers. It includes all meetings in the campaign headquarters, important timelines for major projects, direct mailing parties and other campaign events.
- Schedule for the advance team who traditionally handles putting up the yard signs, setting out the brochures and generally preparing a location for the candidate.
- Finally, a schedule for the family of the candidate that explains the time the candidate will be home, either for down time or for evening meals.

Candidate Time Management

After the job descriptions for the candidate and campaign manager are understood by each other, the scheduler's role is to help set the formula for how the candidate will divide her time. The candidate, campaign manager and scheduler then should set the tone for time management and apportion what percentage of time should be used for key campaign tasks.

It is critical that the time apportioned for the candidate be dedicated to the most important campaign work. Candidates constantly worry about not having enough time to accomplish all they think they should be doing, and most importantly, they seldom have a specific plan of how they should spend their time. Consequently, candidates can be overwhelmed with the amount of campaign tasks facing them. A formula for time management reduces candidate stress and gives the campaign a structure for considering invitations, proposed events, travel throughout the district and "down time". If everyone knows the formula for the candidate's time management, then each supporter can help the candidate focus on the best use of her time.

A good formula for campaign work starts with those total number of waking hours, minus other professional commitments. A day contains 24 hours, but for planning purposes, it contains eight hours for sleeping and an hour for getting ready to face the day and an hour of unwinding before bed. With 14 hours a day to start with, you need to determine what other non-campaign activities will subtract from the total. If you have a full-time job, there are eight less hours a day you will have to campaign. If there are other standard obligations that can't be cut from your schedule, be realistic about the time that will be dedicated to politics. After determining how much time is open for campaigning, determine your time goals.

- **Fundraising.** Time should be set aside every day for personal phone solicitations, individual appointments with large donors, interviews with Political Action Committees and other meetings with business leaders and groups who could contribute to your campaign.
- **Voter contact.** When, how and where you meet voters needs to be programmed into every day. Whether you attend meetings, visit job sites, solicit for individual endorsements or go door-to-door for votes, this voter contact time is a major part of your daily plan.
- **Campaign strategy.** Every day will include time spent with your manager, key coordinators in the campaign and supporters. As campaign activities are planned and your public image is developed, you will find it necessary to keep in daily contact with the frontline staff of the campaign.
- **Campaign chores.** There are many small tasks associated with the efficient office operations of a campaign: signing letters to supporters or donors, reviewing questionnaires, returning phone calls and talking with people demanding to see the candidate.

- **Press time.** Every day, the candidate must have a press strategy. First, she should either read, watch and listen to the local news or be briefed by someone who does. She should call, stop by or make an appointment to see a reporter, editorial board member, or someone else in the media. Speech and debate preparation is included in this allocation of time.
- **Personal/family time.** In many campaigns, the candidate has to fend for herself and her own quiet time. There are some candidates who thrive on campaigning every day and night and never feel the need for a timeout. However, a candidate who never has time to think or be a normal human being, is a candidate on the road to exhaustion and mistakes. Keeping up your physical appearance also requires more personal time during an election cycle, as the haircuts and makeup require attention more often. In addition, a specific block of time each week should be set aside for family time, and it should be honored. If a candidate's family is unhappy about never seeing the candidate, the candidate's stress level will increase proportionately.
- **Transportation.** A candidate's schedule is a complicated affair, and getting the candidate to all the activities is always tricky. Plan for travel time to and from events and allow for increased time for rush-hour traffic. On the busiest days, a driver for the candidate is a must: that person will help manage the candidate's stress, keep the candidate on schedule and allow the candidate time to make fundraising calls.
- As a candidate, you need to clear your professional, personal and organizational schedule to allow for maximum hours of campaigning. With your total allocation in mind, set your formula for time management so it fits you. Your time schedule will vary depending on the office you're running for and the time commitment it requires. Part-time candidates might include running for school board, water board, utilities and hospital boards. Some examples of time management schedules include:

Part-time Candidate	Full-time Candidate
Professional work 6 hrs.	Miscellaneous 1 hr.
Fundraising 2 hrs.	Fundraising 4 hrs.
Voter Contact 2 hrs.	Voter Contact 4 hrs.
Campaign Strategy 1 hr.	Campaign Strategy 2 hrs.
Campaign Chores 1 hr.	Campaign Chores 2 hrs.
Press 1 hr.	Press 1 hr.
Transportation 1 hr.	Transportation 1 hr.
Personal/Family 1 hr.	Personal /Family 1 hr.

No matter what the total number of hours you spend on a campaign, the largest proportion of your waking hours should be dedicated to fundraising and voter contact.

A good estimate of how your time should be spent might look like this:

40 percent	Fundraising
20 percent	Voter Contact
15 percent	Campaign Strategy
10 percent	Press and Speeches
10 percent	Personal/Family
5 percent	Transportation

The candidate's daily schedule will not fall into neat little patterns and percentages every day, but the weekly and certainly the monthly schedule should reflect your time management goals. It is the scheduler's job to help the candidate keep those goals. If, after a trial period, the

schedule goals look unrealistic, adjust them, but always arrange the time management formula so that it reflects the most important time commitments. One important note: if the candidate is spending less time on raising money than allocated in the formula, strive for more fundraising time.

One rule of politics: a candidate can never spend enough time on fundraising.

Each day should reflect variety, efficiency and purpose. A good scheduler can stand back and see the many invitations, personal appointment requests, proposed community meetings and campaign staff member's requests and then give the candidate her recommendations for a balanced schedule that keeps to the time management formula. The scheduler insures there is adequate time for the candidate's meals, sleep and rest, family time, thinking time and briefings prior to important public events.

Tips For The Scheduler

Keep one, and only one, master schedule. Also, have one, and only one, scheduler. There will be many people who will want to commit the candidate to an event. If you don't take charge early and require one book and one scheduler, you will have the candidate promised to be in two places at once. Not good

Reach a firm agreement with the candidate that any person who approaches her personally to request an appearance or meeting will be referred to the scheduler. Most candidates, after an initial bout of independence and reluctance, will actually prefer to delegate this to the scheduler.

Determine where the candidate needs most to be and what the candidate needs most to do. Have a map of the precincts and neighborhoods where most of your targeted swing voters live. Take a look at the most important time goals every time you consider an invitation. Make sure you make decisions based upon the candidate's opportunities and not just the fact that someone wants you to be at an event.

In considering a time commitment for the candidate, ask: how much money is it likely to raise, how many voters is she likely to convince or meet, how much press is she likely to get, how many supporters will she anger if she doesn't attend and which time goal does this appointment fulfill?

At the beginning of the campaign, discuss with the candidate what her personal obligations are (to her family, work, personal thinking time). If there is a time during each week that is considered sacred, do not challenge it unless it is a top TV debate or other substantial conflict.

Constantly evaluate a possible appearance for its potential media coverage and let your press secretary know about such opportunities.

Prepare a daily schedule for the candidate and her driver/aide. It should reflect all of the candidate's time by specific hours and specific locations, even door-to-door canvassing, meals and rest periods. These schedules should be given to the candidate at least a day in advance. The candidate's family should be given weekly updates and a monthly schedule.

Schedule smart. But, be sure to schedule enough time for introductory speeches, handshaking on arrival and departure, telephone calls, collecting thoughts before a speech, lunches and time to freshen up.

Keep a hard copy of the schedule with you, no matter where you go. Leave telephone numbers where you can be reached as well as an extra copy of the schedule in a secure place where campaign staffers can find important detail information in your absence.

Generally speaking, voter contact time in the primary should be directed to getting your party voters. Voter contact time in the general election should be directed to the general and independent voters.

Handling Invitations

There are scores of people and organizations who are interested in having a candidate speak to them. How you handle those invitations is often a good indicator as to how organized the campaign is and how successful it will be. In many cases, an invitation is the first and only interaction an organization will have with a campaign. This rapport must be a positive one.

All e-mails, phone calls, mailed invitations or direct requests should go in one file box for the scheduler to review. The scheduler should tell everyone who phones in a request to follow up the call with an e-mail with all the pertinent information. Many schedulers ask for a caller's e-mail and then forward the candidate's form which standardizes all requests. Still others will direct the caller to their web site where the form is already posted. Those requesting the candidate's time will often want a photo and short bio of the candidate which should also be posted on the candidate's web site for easy downloading.

A schedule form should be filled out for every personal appointment, lunch, meeting, speaking engagement, campaign event, personal appearance and community event. Happily the Internet and computer scheduling has made this process easier and more foolproof. The request form (either online or on paper) should request:

- The person making the request, the address, the home, work and cell phone, plus that person's home and work email.
- The organization represented, the organization's address and webpage (if there is one, for research purposes).
- The date, time and location of the event.
- The type of event and who will meet the candidate.
- The nature of the event and what is required of the candidate.
- The number of people attending and who will introduce the candidate.
- What attire is appropriate and whether the candidate's spouse should attend.
- What form of transportation will be used and the specific directions to get to the event.
- Other comments, background or briefings the candidate might need; why it is important or the degree of importance it has to the campaign.
- Who else should attend the event and what literature can be handed out at the event.
- If the request was accepted or who else might represent the candidate.

Fill out the schedule request form for every event, and you will get into the habit of asking the right questions each time you get a new request. Also, it is important to respond to each event request as promptly as possible. How do you decide what invitations to accept; which ones can you gracefully get out of attending and to which ones can you send someone else? The following checklist will give you an idea of how to answer an invitation:

- Will the candidate raise any money at the event or meet people whom she can call at a later date and ask for money?
- Will there be any media coverage?
- Are the people at the event part of our targeted audience?
- Will the candidate lose support or will an opponent gain support if she doesn't attend this event?
- What are the other possible uses of the candidate's time during this event? Are there more important priorities?
- Will the candidate be able to make comments or persuade swing voters to support her? What are the chances she will find some new volunteers?

- Has she talked with these people before and are most of them supporting the candidate already?
- Will she make any key supporters angry by not showing up?

These questions, starting from the more important ones at the top, give you a good gauge to determine which events you might want to accept. Once you decide an event is one of the top priorities for your candidate, let the hostess, contact or organization know. A simple email acknowledging and accepting the invitation will solidify your plans as well as the inviting organization's plans.

A good scheduler knows that in a typical election district, there is a good chance that two events will be scheduled on the same evening. However, it is possible for the candidate to attend both in some instances. A speaking engagement at night can be made at the beginning of the meeting (7:30 p.m.) or at the end of it (9:00 p.m.). In the same situation, if you want to plan to attend concurrent events, insure that the hostess, the person inviting you or the key contact, knows your conflicts. Most people appreciate the fact that you made an attempt to attend a meeting or event and will not mind if you have to cut the appearance short.

WARNING: It is important not to fall victim to the overpowering program chair of your local civic organization who will try to convince you that every other candidate has already said they will be at a specific event. In an attempt to get you to confirm an invitation, overzealous hosts will lead you to believe anything. Check out the facts for yourself.

In some cases, it is appropriate to establish contact with your opposing candidate's campaign and confirm those events which others have said the competition will attend. Candidate coercion happens in every campaign cycle: be careful to set your own schedule instead of being lead by self-serving groups who are coloring the truth about who will attend.

Also, there are events where you will be asked to speak along with your opponent when you are certain that your host is in the back pocket of your opponent. Prepare in advance for these events and expect the worst. Ask your supporters to attend and you should be very well briefed on the subjects that might come up. Have your scheduler go through the format in advance and follow up that discussion with a written note back to the organizers reiterating what you understand the program to be. At the "loaded" event, keep your comments to the point, be gracious and leave as soon as the event officially ends.

If there are scheduled conflicts where you absolutely cannot attend, explain the absence based upon the other campaign conflicts, letting your contact know you would prefer to be at their event. You need to decline the invitation as soon as possible and offer to make alternative dates for another meeting. In some cases, you can use a surrogate speaker. If you can't make an event but have an elected official who is a supporter and has promised to help you, then ask her to fill in. If you can get a celebrity or very popular person to take your place on the podium, most groups will let you off the hook easily.

Canceling An Invitation

There are events you dutifully accept and place on the schedule. Then, particularly in the last weeks of the campaign, a large media event will be scheduled, and you will be forced to cancel a well-attended appearance. The scheduler needs to be direct and apologize for the inconvenience as soon as possible. In many cases simply explaining the conflict will suffice; do not be overly apologetic or you heighten the cancellation woes for the inviting hostess or organization. Most people should realize that campaigns are driven by opportunity and timing. If an important supporter is told of a last minute cancellation, he might feel personally slighted; tell him the cancellation was unavoidable, what goals you chose instead of his event, and limit the conversation.

Whenever possible, the scheduler should decline or cancel invitations; the candidate should not put herself in a position where she is making enemies. It is possible for the candidate to send a surrogate speaker in her place. Surrogate speakers should be elected officials or other

prominent persons who are recognizable in the District. People usually appreciate someone coming to deliver the message, even if it's not the candidate herself.

There are some cases where refusing to attend an event will be a strategic decision done for the good of the campaign. For example, if an incumbent has been scheduled to speak along with a challenger, she might determine that there is no advantage to be seen with a newcomer. Other events may include meetings where a no-win problem will be discussed; if you have nothing to add and the people present will be enraged at your position, it is time to look for a conflict on the schedule. A good scheduler will then have a critical event or appointment that she will be able to arrange quickly as a back up conflict that will better explain why she can't make the event.

Initiating Invitations

Most of the scheduled items on the campaign calendar should be events, projects and personal meetings that the scheduler has placed there after reviewing the time management priorities of the candidate. The most important components will be blocks of time (usually three hours, at least three times a week) when the candidate will call prospective donors to ask for contributions. Other fundraising events are also a very high priority.

The candidate, campaign manager and fundraiser will have names of movers and shakers who need to be asked in person for an endorsement. These names and phone numbers will be given to the scheduler for making appointments for important breakfasts and lunches (dinners are usually too costly or reserved for invitations to couples and families).

As for the rest of the people and places that the candidate should have on the schedule, it's important to find those voters who are in your key targeted areas and focus on those events, meetings and reasons to be in the targeted neighborhoods. The candidate should be seen at community meetings, school fairs, local parades, shopping areas and even at the restaurants and movie theaters where her voters are enjoying their "down time."

The scheduler should have a map of the targeted areas important to the campaign and refer to it every day to see where more events might be scheduled. The scheduler can then scout out prospective invitations from a number of groups with whom the candidate should meet.

There are many organizations that would love to have a candidate speak at their event or luncheon. Find those groups anxious for the opportunity to learn about local government and campaign issues. In some cases, there are groups who never hear from any candidates; these may be better prospects than those groups who hear from political speakers every other week.

Promptness

With the press of business, politics, social occasions and even those few moments of personal time, not every day will run like proverbial clockwork. A candidate who gets a reputation for constantly being late will lose respect, if not votes. Make sure that you plan for adequate time to get to and from events. Anticipate time that voters will need to question candidates at the close of an event. Get into the habit of going to your car earlier than you think it will take to get to an event.

If you are late, apologize, don't take people's time for granted. And, resolve to be more prompt next time.

To minimize the number of problems and to update last minute changes to the program, the scheduler must reconfirm the major events on the schedule. All critical public appearances should be rechecked the day prior to happening.

Special Appearances And Visibility

Greeting workers as they come to the office, plant sites or shift changes is a common campaign activity. The campaign should confirm with the proper authorities in advance that the candidate will be there. There are often union members, key employee organizers, important workers or respected leaders the candidate can ask to greet workers with her. Early morning appearances should include leafleting with brochures, putting up yard signs where the candidate

will be standing and having campaign workers accompany the candidate to answer questions from workers.

Wherever the candidate goes, there should be a look of high visibility. Many candidates forget that these community appearances may be the only occasion where voters will actually see the candidate in person. The people accompanying her should be energetic, well groomed and upbeat. They should always reflect positively upon the campaign. Banners, yard signs, balloons, T-shirts, brochures and other paraphernalia all catch the public's attention and add to the hoopla of the event.

Before you take the sign-wavers, the candidate and literature to a plant, shopping centers, department stores or other popular places where people congregate, make sure you get permission from the managers or owners. Usually there is a business office for all major public centers, and it is listed in the phone book. If you can't find the name, call one of the stores in the mall and ask for the manager's number.

No matter where the candidate and her entourage go, it is imperative that they leave the location cleaner than it was prior to their arrival. No brochure or litter should clutter any path the candidate has taken.

Background And Briefings

The candidate needs to know as much as possible about the people, the place, the organization, the subject matters to be covered, the people she might meet (on or off of the podium), the press in attendance and anything else that may give her added security, self-confidence and a better performance in front of her voters.

A good scheduler will inform the campaign manager, press secretary and the issues research team about the subjects that might be on the upcoming public agenda. Extra research might be required. If more information is needed for the candidate to review before a specific event, it is imperative that the candidate has enough time to absorb the information. Days and weeks of added research are wasted in many campaigns either because the candidate did not want the information or because there was no time for her to adequately read and understand it before a public appearance.

For most events, the candidate should know who will introduce her as the scheduler will have taken the initiative to forward a good introduction or candidate biography to the host organization. In this way, the candidate may be introduced in a very positive light by someone the audience trusts and believes.

The candidate should be told about key leaders and other important people who will be in the audience so that she can refer to them in the speech or make a point of acknowledging them before she starts speaking.

It is critical to know exactly how long a candidate will be allowed to speak and in what order. If you are told you can speak for three minutes and you have a five-minute presentation, it is difficult to cut your comments as you are giving them. And, nothing is more defeating to a person's self-confidence than just getting to the key reasons why you're running only to have a bell go off signaling your time is up. Also, if you are the last to speak, you may want to be prepared for additional comments on key issues so that you do not sound like an instant replay of your opponent's comments.

The Family Schedule

One of the most common forms of a candidate's family's participation is to attend events where she is speaking or where her campaign supporters are assembled. Family members should have a reliable weekly schedule of activities. One easy way to alienate a potentially supportive family is to give them outdated schedules or no schedules at all.

The scheduler should not rely upon the candidate to bring a copy of her schedule home for the rest of the family to see. The campaign should either bring one to the candidate's home or email it to the candidate's spouse as well as the candidate's personal account once a week. If

there are major changes in the time the candidate will be home, the scheduler should call the family and let them know.

Advance

In campaigns blessed with many volunteers and complicated candidate schedules, you will want to allocate a person or several dependable people to set-up each major campaign event. These people will work closely together with the scheduler and community coordinators to insure that everything is set up for the convenience, visibility and voter contact of the candidate.

Good advance people will take a day full of candidate activity (particularly close to the end of the campaign) and walk through all the events, speeches and public appearances planned. The advance people will inspect the sound system and podium, determine whether or not flyers and posters can be placed throughout the room, and suggest where the candidate needs to make her entrance for best media coverage.

Advance teams usually arrive long before the candidate does. They make sure the room is ready and the yard signs dot the driveway en route to the event. They leave as soon as the candidate arrives and go onto the next event, setting it up.

The advance staff is also responsible for driving the candidate to events. The driver makes sure she has the correct directions and drops the candidate off at the door of the event. She also jots down the names and addresses (or collects business cards) of those with whom the candidate speaks. The advance person also can double as a photographer and take candid shots of the candidate for future publications. She can help move the candidate around a crowded room, making sure that one person does not dominate her time when hundreds of voters are waiting in the wings. Advance work takes patience and punctuality, but most of all it requires close coordination amongst the scheduler, the candidate and the advance person. Advance staff should also help the candidate with her purse or jacket, making sure her hands are available for shaking hands. Take gifts, and head off people who are going on and on and on about an issue. The candidate needs to maximize her time and exposure with as many people as possible.

The schedule is the best quality control measurement you have in the campaign. A candidate who focuses her time appropriately can increase her efficiency in raising money and gathering voters. She can determine the best use of her time and work according to her goals. As each campaign is filled with hundreds of would-be chores and tasks, it is critical to know which are the important ones you will choose to do and those you will choose not to do. This decision-making process is the only way you can control your campaign.

Chapter 11

Image

You never will get a second chance to make a first impression. Your appearance will speak thousands of words before you utter your first. Like it or not, the way you look is a part of your message.

People are busy, and just as your message must be ready for prime time, so must the image you project.

If there is one pervasive criticism of public officials, it is that they come across as artificial—as not being real. The public is craving genuineness. Voters want someone whom they can relate to, not someone who is trying to con them with a demeanor and promises that are transparent and forced. Successful candidates need to be intimate in front of total strangers.

This means you can express emotion, you can show concern, and you can be perfectly genuine even when you are in front of an audience. It all goes back to knowing yourself. What are your values? What guides your decisions? How do you feel about controversial issues, such as reproductive rights, the death penalty, gun control, gay and lesbian rights, and other "wedge issues" that determine many voters' choices for office? Why do you feel as you do? These are extremely emotional issues which you need to be prepared to deal with --from the gut. People can sense when a candidate reels off rehearsed statements. If you are going to effectively communicate with your audiences, you need to speak from the heart.

Being Real In Front Of An Audience

Being real in front of an audience is one of the most intimidating, yet most effective tools for presenters. If you are able to get up in front of a group of people and share yourself with them they will open themselves up to really listening to what you have to say. No one wants to listen to a phony. No one cares. But if you show respect for your audience by being genuine, you will be richly rewarded with not only their attention, but also their respect.

Communicating Who You Are

- **Discuss the issues** about which you are most passionate—people know what turns you on and what doesn't.
- **Illustrate your message** with personal stories; people listen to people, show them you are one of them.
- **Use humor.** We all have the ability to be funny, especially when we laugh at ourselves.
- **Use your knowledge** of the subject to demonstrate that you really care about the issue.
- **Deliver complex ideas** in simple terms—no one wants to hear a bunch of jargon.
- **Be animated.** The more energy you use to communicate your message, the more energy the audience will use to listen to it.
- **Smile.** Not only does it help you relax, it engages your audience.

The Makings Of A Good Speech

For millions of women (and men) the fear of public speaking ranks higher than the fear of death. Yet each day we talk with dozens of people without any problem. The key to successful public speaking lies not only in learning to be effective in front of the podium, but learning how to talk intimately with one person, while hundreds of others look on.

To be genuine in a large group is challenging. Meaningful interaction takes place one-on-one; in a large group you simply speak to one person at a time as you move your focus

throughout the room. The result of two people connecting --sharing a moment or a thought together--will be perceived by the others in the room and all will enjoy the authenticity of the speaker. Thus, the key to successful public speaking comes from a candidate's ability to sincerely reach out to one person after another; and through this process draw an audience into an exchange so that every person in the audience feels as if you are speaking directly to them.

Organizing Your Presentation

Staying on Message

There is probably no term used more in campaigning than, "staying on message." This important maxim holds true for every form of communication--an interview, a talk with supporters, or an important debate. Unlike other settings, the most important step in preparing your presentation has already been determined. The subject (your message) is the point of the speech, whether you're talking for one minute or one hour.

Your message is your guide through every communication. First you must focus on what you want to "give" the listener, next, you want to ask the listener to do something next as a result of having heard you speak. Always include a call-to-action in your talk; people want to be told what to do next, it is a help to give them that guidance.

- Do you want the group to give money?
- Do you want the person to endorse you?
- Do you want to share your message in contrast with your opponent on the same podium?

The Target Audience

Once you have determined your objective, begin thinking about the setting in which you will be speaking. Who are you speaking to? Where will you be speaking? Who else is speaking? What is the occasion? The tone, length, and tools you use to communicate are all dependent on the answers to these questions. It is as important to know your audience as it is to know your issues. The audience looks to you for inspiration, new information, competency and leadership. They judge your effectiveness as a speaker, a person and a leader.

What you don't say in words speaks volumes:

- Self confidence
- Level of enthusiasm
- Posture (head, shoulders, torso and feet)
- Non-verbal communication: gestures, facial expressions and pauses.
- Eye contact (95% on audience)
- Friendly manner
- Variations in Voice & Volume
- Variation in Rate (talking fast, then slow)
- Ability to speak impromptu
- Use of humor

Keep It Short

Once you figure out the target, then comes the length of your presentation. It seems that somewhere it's been written that once a candidate has been given a microphone, she can talk as long as she possibly can. For the rest of us who have had to sit through endless drawn-out, wandering speeches, we would like to suggest an alternative. **Less is more.** Your goal as a candidate is to be effective--not long winded. The more succinct and dynamic you make your presentations, the more favorably your audience will respond.

The Natural Phases Of A Speech

Introduction: The introduction needs to grab the audiences' attention. Just as your appearance gives people their first clues about you, your initial comments signal the rest of your presentation. After gaining attention, it is important for you to establish a rapport with the audience. Show the audience you are open to them and looking forward to an exchange of ideas.

Body: Support your message. If your message is "getting things done," then support your message with facts, your experience, your vision or ideas. This is an ideal opportunity to inject personal stories that reveal your ability to overcome the odds and make things happen in the community. The more dynamic and lively examples you use, the more your audience remembers. Think of it as drawing a picture for your audience: the clearer, more graphic and colorful, the better the understanding your audience will have of you and your presentation.

Climax: The climax is the point in your presentation when you grab your audience. It's the time to let the audience respond, making your case -- hopefully, a gift of knowledge from you to them. The information is now theirs to decide what to do with it. This is the point you want people to remember, perhaps with a call to action. Be sure to include your call to action—what do you want the audience to do as a result of having heard you speak?

Conclusion: Repeat what you have told them: your message. A good conclusion leaves the audience with a clear picture of what you have just told them. It summarizes your main points and gives the audience one last reminder of your purpose. For most candidates, the relief of getting to the end often leads to a speedy and haphazard departure from the stage. This is your time to wrap-up your comments with energy and enthusiasm. Take in that applause. Establish eye contact with those anchors in the audiences whom you relied upon during the speech. And remember to repeat your name and ask for their vote.

The Importance Of Practice

Practicing your presentations is something that we all agree makes sense, but few people actually do it. If you are to become a great presenter, you need to invest the time in practicing your presentations. Try practicing in front of people who match the target population you are courting on the campaign trail. Also, time your sessions to ensure compliance with time constraints.

Different Formats

Most candidates always want to say too much. They try to get their entire biography, their endorsements, their vision of the future, their key issues, their campaign plan and a few jokes -- all into the space of three minutes. Perhaps you should say more by talking less. Try following the age-old advice: tell them what we're going to tell them; tell them; and then tell them what we told them.

There are many different ways to approach a public speaking event. For a short substantive speech, do not try to cram your 20 minute speech into three minutes. Instead, try something that is more akin to a great introduction as opposed to a speeded up version of the main speech.

The Introduction: One Minute Speech

Even when you are not running for office, you introduce yourself to more than 100 new people a year. When you're on the campaign trail, you may well introduce yourself to more than a thousand individual people. You can make an impression, or you can do what thousands of other candidates do (and people in general) --make it an absolutely forgettable experience.

The best of all introductions are well-thought out, practiced and interesting while being on point. They can be written by the candidate, her press secretary or her campaign manager.

There are five parts to a good introduction:

- Your name and the position you seek
- Your position, job, title and "claim to fame"

- Your message and why you're running
- What you want from your audience (support, vote, contribution, understanding)
- Your name again

Basic Three Minute Speech

- Introduce yourself in relation to your background, experience and top posts you have held.
- Answer the question of why you are running for office, repeating your message as often as is physically possible in three minutes.
- Ask them for support, money, help, etc.--what you'd like from them.
- Repeat the message.
- Sit down. Most candidates run out of time before they finish their thoughts--and they leave the audience with little more than the impression they were hurried and didn't finish what they intended to say.

Remember that less is more.

A Rousing 20 Minute Speech:

When you are the main course for a speech, you need to give it your best. It needs to be practiced, filled with enthusiasm and right on message. One approach is as follows:

- Have an attention-getting introduction (what is your connection to the audience, a story, anecdotal material, humor).
- Present the facts the audience might not know preferably setting your message.
- Deliver your message.
- Present a problem with government or something challenging that's facing your community today.
- Present the solution.
- Give a clue as to what your opposition is likely to say about this problem.
- Explain why the opposition is wrong.
- Get us to the next step.
- Issue the challenge --not only for yourself, but for government and for everyone in the room.
- Build to the conclusion (restating the message).
- Deal with the applause (or walk into the audience to shake a few hands, give a few hugs and head back up onto the stage).

There are tips for making your presentation human, interesting and a hit with your audience. Tell stories. One characteristic of the best women speakers is they relate issues to a story in their life or someone they met. Whereas men are known for speeches that begin with a joke in the form of a story, women are more effective in using their own stories to the point of their speech.

Also, women have found that in recounting the story of a person they met on the campaign trail, they remind voters of how she will remember the people she met when in office.

Answering Questions After The Speech

In most political settings, be it during a campaign or official appearance, the environment is often highly charged with people who have various views on issues. Therefore it is inevitable that during formal or informal remarks, questions will be asked of the presenter. Mastering a few question and answer skills will make these exchanges ones of opportunity.

- Remember that as the presenter you control the tone of exchange
- Only answer the question that is being asked—do not digress to other topics
- Know your message and always use it to anchor your response
- Keep your response brief
- Do not get sidetracked by loaded questions
- Use humor
- Stay calm

Dealing With The Tough Issues

From taxes to term limits, there are issues which will more clearly define you from your opponent. Everyone running for office is against crime, wants their kids to have the best education, will work to create more jobs, and will have something to say about transportation. But, the "wedge" issues are much more touch and go.

The most frequently mentioned emotional issues concern the following:

Abortion: once the simple matter of whether or not a woman should be allowed to have one, the issue of abortion now includes parental consent, spousal consent, funding for abortions for women on public assistance, counseling on birth control in high schools, sex education, and forced sterilization.

Gay and Lesbian Rights: from codifying rights for all gay people to freedom from discrimination in jobs, housing, marriages, and adoption of children, gay issues abound.

Gun control: handguns, registration for all guns, waiting periods before purchase, restrictions on people convicted of felonies, and outlawing of rapid-fire weapons--this issue grows every year.

Death penalty: right or wrong, for what offenses, appeal process, as well as the cost implications.

Poverty: welfare reform, housing reform, illegal immigration, and affirmative action.

Jobs versus Environment: regardless of the region or the economy, there are differences that pit jobs against the environment. In suburbia, it's urban sprawl; in the cities, it's urban redevelopment or gentrification; in the country, it's farms versus development. Neighborhood values which run at cross purposes to development are at the core of this age old fight.

Battle of the Sexes: discrimination, sexual harassment, funding for domestic violence programs, equal employment opportunities, credit laws, and pay equity; despite the perception that women are equal to men, there are many lost battles that frame today's campaigns.

With all of these controversial issues, there are no right or wrong answers. However, there are considerations you might want to figure into whether you choose one battle over another.

- **First**, you should talk with respected people from the district to get a better idea as to how the movers and shakers feel about polarizing issues that might surface in your campaign. Also, get the history of their stance on the issue over the years.
- **Second**, consult the polls. Determine how people vote on the matter; after all, you will be representing them. Determine how this issue sorts out with your voters, your opponents' voters and the all-important swing voters.
- **Third**, determine what your true feelings are about the matter. There are some issues that you may have a "feeling" about, but not feel so strongly about that you would go to the mat. The truth is that many candidates may feel differently from the majority of their swing voters on one or two issues and choose not to make them the key ones that define their candidacy. They may choose to represent their constituents as opposed to their own issue priorities.

- **Fourth**, announce your convictions, even if you know they fly in the face of the majority of your constituents. In today's political climate, it's OK to admit that you don't always feel the same as your constituents as long as you can look them in the eye and tell them the truth about how you feel. Often times, the public may not agree but admire how you have been up front with them.
- **Fifth**, invite your constituents to tell you where they stand on these issues, and be clear that you are inclined to disagree with the majority, but that you will represent their feelings as this issue is not one that draws your strong convictions, unlike others which you also mention.
- **Sixth**, announce your determination not to be held hostage by any of the interest groups which control many of these issues. Attack the political process whereby these issues dominate the debate as opposed to the real issues that you will be voting upon.

Before you choose to take a stand or answer a question on these polarizing issues, do your homework, know yourself and choose your battles. Don't expend valuable political capital on a no-win situation. You cannot stand up for all your convictions, particularly if you live in a district where the majority of voters think differently than you.

Be smart without selling out your values.

If you keep in touch with the values that have brought you to this candidacy, you will have the power to communicate those ideals to your constituents despite the rocky road ahead.

How You Sound: Your Voice

For many women, her voice is the most undeveloped asset she has. Most people think you were born with a specific voice and that's all you get. But your voice is made up of muscles that can change with practice, and your resonance can change by you just understanding what you sound like every time you speak.

There is untapped potential in your voice; it is much easier to control or modify than most aspects of the rest of your image. And, it costs nothing to change. A strong voice is especially important for women. High squeaky voices can irritate any one of us. Reporters frequently mention women's voices as standing out from the rest of the candidates. The accusatory "mother-in-law" voice has been noted often in political reporting coverage.

What is it about a voice that makes it memorable – or safe, confident, strong or inspiring? Your voice conveys your innermost feelings – most times without you even thinking about how you feel. It defines you without words. You may recall times when you were listening to people speaking other languages when you could detect they were angry, confused or just plain happy. It tells more about you than you think. It is the easiest characteristic of your personality to remember, though it is taken for granted. It takes practice to master the voice you want but you can change it and reap the benefits within seconds

A Different Voice: Women and Men

There are hereditary advantages as well as disadvantages to having a woman's voice. First of all, it sets us apart, and it says that we are from that half of the population that is known for being caring and compassionate. Women's voices are higher-pitched and their speech patterns are usually more varied and less monotonous. It is perceived as more emotional.

How you present yourself is more than just the speech and all its trappings. How you sound has a very dramatic effect on what people hear and how they will evaluate you. What people value as you speak includes:

- Level of self-confidence
- Level of enthusiasm
- Posture (head, shoulders, torso, feet)
- Gestures and facial expressions

- Eye contact (95% on audience)
- Friendly manner
- Variations in voice volume
- Variations in rate; pauses
- Ability to speak impromptu
- Use of humor
- Voice tone
- Variations in vocal pitch

Your voice gives people many clues about you. Are you forceful? Can you keep up with all the other elected officials? Are you sincere? Are you honest?

To judge your own potential, practice your speech with a tape recorder in front of you. Play the speech back and see for yourself what you might improve. Remember to avoid irritating words like “um,” “whatever,” or “like.” Give the tape to friends and professionals who deal with speech, voice or image. What do they suggest?

Often, particularly with women, the voice is an underestimated characteristic. Like other tools in your "presence" arsenal, you can improve your image by improving your speech and voice patterns. Like your other characteristics, your voice can be trained to be more effective on the stump. Try it.

How You Look: Your Image

There are at least fifty clues as to who you are: characteristics that can be drawn from just looking at you. Before you ever open your mouth, within seconds people are making determinations of whether or not they like you. Think of it. You prepare for speeches and presentations, crafting your words carefully and honing your message as best you can. Yet those physical clues to your real soul are shouting out to the people you meet. These include:

- Physical (tall/short, thin/heavy, sex, age)
- Demographic (ethnicity, locale)
- Vitality (body language, energy, fitness)
- Personality (aggressive/shy, confident/nervous)
- Lifestyle (clothes, economic class, contemporary/traditional)
- Health (glasses, teeth, disabilities, breath.)
- Other

A study conducted at UCLA reveals much in terms of what we believe when hearing speakers. The results:

- The verbal message (words we use) accounts for 7 percent of what is believed.
- The vocal message (how we say it) accounts for 38 percent of what is believed.
- The visual message (what your audience sees) accounts for 55 percent of what your audience believes.

The way you dress is an important communication tool. It can help you achieve your objections. Use it to your advantage.

Color

Color, and its proper use, can make a tremendous difference in how you look. It is one of the first things people notice about your appearance. Once you discover what colors look best on you, you can begin to make impressive changes in your image impact.

Clothes

Your clothes make a tremendous statement about you. While quality, tidiness, and style are important for all of us, women's options are vast, making the selection you choose even more important. While a male candidate can make it through a campaign in suits and khakis, a women must choose her outfits appropriate for the occasion with great care.

During a campaign, your wardrobe must meet several demands.

- **First**, it must communicate a professional manner.
- **Second**, it must be flexible to get you from your 7:00 a.m. fundraising meeting to your last coffee klatch at 8:00 p.m.
- **Third**, it must be functional and comfortable. The last thing that helps you be your best are shoes. You can't belt out that speech, or reach those targeted voters on the hill if your feet are killing you.
- **Last**, and certainly not least, your wardrobe must include clothes that you enjoy wearing. Your clothes will contribute to your overall feeling of well being on the campaign trail.

You can begin building that winning campaign wardrobe by clearly identifying your goals. How will you be spending your time on the campaign trail? What types of events and activities will dominate your days? For most candidates, the answers will include a wide variety of undertakings. Once you have inventoried your potential schedule, develop a sense of the types of clothes you will need for each activity and how they blend together. Also keep in mind, your sense of the image you want to convey. When you have completed these exercises you should have a good idea of the types of clothes you will need.

It's spring cleaning time for that closet of yours. This may be a painful process for those accustomed to certain garments, but you must identify what looks good – and get rid of the rest. These include articles of clothing that no longer fit the way they used to fit, older out-of-style items, worn, spotted, or stained items, and clothes that do not fit into your color, figure, or campaign goals. If you haven't worn it in six months – get rid of it!

Organize your closet to meet your image goals. The key is you want to easily access the clothes you have available for a particular event. You also want to be able to quickly mix and match similar clothes to provide you with a variety of outfits. Whatever your organizational system, make sure that it supports your image goals.

As a candidate you need to be prepared to invest in clothes that will support your professional objective. This means a trip to the local department store with someone who will help you select garments in keeping with your goals. Do not go alone. You need to have someone who sees you as the voters will, and will provide you with honest feedback. If possible, take someone skilled in image consulting; too often friends or staff will not give you the guidance you need in building the most effective wardrobe.

One last wardrobe hint, try to build your wardrobe around three core neutral colors. Each season has neutral shades. The most effective way to integrate these colors into your wardrobe is to have a jacket, pant, and skirt in each of three neutral shades. With matching shoes, you are on your way to an extremely versatile wardrobe. From this point, each blouse you purchase should work with each color and provide you with endless mix-and-match options.

Accessories

As a candidate, the statements you make with your accessories will be closely watched. Does her broach have a hidden meaning? Is that scarf so glamorous looking that it cheapens her? Regardless of the outlandish speculation and interpretation that the public and media might engage in regarding your appearance, it is important that you keep in mind that people are more likely to remember what you wear, how you look, and what stuck out--than remember that message of yours. If you give your clothes or accessories a reason to stand out, they just might--to your disappointment.

Jewelry reveals a great deal about the woman wearing it. Keep jewelry to a minimum. No more than one ring per hand, one necklace, and small to medium-sized earrings that do not dangle.

Shoes are one the most important items in your wardrobe. Finding shoes that are both comfortable and complimentary will go a long way toward maintaining a well-respected appearance. Shoes should be purchased for quality and durability. This is especially true on the campaign trail. Purchase shoes in your core neutral shades and always keep them well maintained and polished.

Eyeglasses, if you must wear them, need to coordinate with your total look. The color and shape should compliment your natural features. Avoid colored lenses, they prevent people from being able to look you in the eye. If you wear glasses during a television appearance, make certain to ask the crew to adjust the lights so your eyes are not in the shadow of your glasses.

Handbags and briefcases are imperative on the campaign trail. From the cellular phone to your fundraising lists and make-up: they contain essentials. Whenever possible, do not carry a purse while campaigning. It is distracting for you and gets in the way of impromptu pictures.

Makeup. There is much free help you can receive from your local cosmetics counter in any major department store. These women and men are in the business of selling products and encouraging you to buy lots of products. It's good to make an appointment with a professional (ask your friends for who they have used in the past) whom you can inform of your candidacy needs.

You'll want a consistent look

You'll want a look you can recreate

You'll want a natural look that stresses professionalism

You won't want a heavy or over made up appearance

Image Tips For A Better Presentation

- **Do not get trendy.** Stick with a classic look.
- Buy the best clothes you can afford.
- **Do not dress fancier**, flashier or much more expensive than your constituents.
- **If you wear glasses, buy non-reflective.** You don't want to interfere with people seeing you.
- **Do not wear low necklines** or mini-skirts for public appearances.
- **Keep light make-up** around for touch-ups in front of audiences or cameras.
- **Anything that distracts** from who you are and what you are saying, take it off.
- **Remember that tight clothes**, short skirts, high heels, noisy, flashy jewelry, or jeweled nails don't work.
- **When in doubt**, it's always better to go conservative. You will be more believable.
- **For many reasons, avoid alcohol** at events; besides, you will look very unappealing to voters if the drink happens to hit you at a time when it dulls your speech or thinking. Your opponent can, and no doubt will, use this against you.

Preparing For The Camera

While most of the presentation skills for a live audience are appropriate for television there some specific rules that apply to on-camera work.

BEFORE GOING ON CAMERA

Select an outfit with no more than three colors and don't wear any white.

Wear clothing with a lapel or a collar

Know what the backdrop will be

Remove any highly reflective items you may be wearing

Remove any jewelry that is distracting

Check your face to ensure that you have a flat, non-reflective skin tone

WHILE YOU ARE ON CAMERA

Maintain appropriate eye contact: look at the interviewer, not the camera

Speak conversationally

Be energetic and animated

SMILE

Keep hand gestures to a minimum, use a closed hand

Lean into the camera

Preparing For Media Questions

The media's job is to get you to say what they want you to say. Your job is to respectfully answer their questions with what you want to say. Successful interviews hinge on the interviewees knowing what it is they want to accomplish with the interview.

BEFORE YOUR INTERVIEW

- Know your message
- Prepare for the questions that will be asked of you
- Be prepared to cite sources for your comments
- Check your appearance

DURING YOUR INTERVIEW

- Always tell the truth
- Don't say anything you don't want to
- Be brief
- Be precise
- Be conversational
- Engage your interviewer
- Thank your interviewer. After the interview take the time to critique yourself!

Preparing For Editorial Boards, Roundtables & Debates

The rules for these media setting are similar to those of preparing for the camera. The difference is that you will be dealing with multiple responders—which does create different opportunities and challenges for a presenter.

Pre-critique the situation—in the ideal when you do want to speak, what do you want to say, etc.

- Be warm and gracious to your counterparts
- Use others' responses to build contrasts
- Be positive when creating the contrasts
- Crisp, clear statements will be quoted
- Do not directly engage your counterparts
- Do not get angry
- Pay attention and maintain an interest in what is going on
- Always look at the responder during part of his/her response

Remembering People's Names

- **Ask for business cards** from everyone you meet.
- **Insist on name tags** at all of your own events, and then take name tags to other people's events and have them ready in case the hosting organization forgot them.
- **Keep a pen and paper with you** at all times, so you can have a person write down her name and address (you can look over her shoulder to refresh your escaping memory).
- **Set yourself up to remember a few critical names** before walking into a room. Don't be afraid to ask a person about her occupation or where she lives, particularly if you are being introduced to a long line of people. The pause does your mind good and may help you remember a few more names.
- **Take someone with you**, so he can be the fall person who says, "I'm sorry, but I don't believe I know your name." The candidate then can say, "Oh, I'm sorry, I thought you two knew each other."
- **Remember something special about the person**, perhaps something that rhymes with her name and is characteristic of her (Slim Jim, Chatty Cathy, Sweet Amy, etc.).
- Remember where you met the person or where she might work.
- **Know someone in the room** or remember the name of the first person you were introduced to in a long line of people. Then go up to that person and ask her the name of the person you can't remember.

When you meet someone new, try and repeat her first name in your conversation several times. Not only will this help you remember the name, but it also will help you associate the name with her face.

Keeping Up Your Own Self-confidence

Some of the best pieces of advice from women about public speaking and campaigning include tips from the local, state and Congressional women who have been trained by the National Women's Political Caucus. Their suggestions:

Stay grounded yourself. It is often said that all politics corrupts absolutely—that politicians forget their roots and become too good for the people who once urged them to run. Be humble. Be thankful. Be true to your own values. And be real.

Know your own limits, physically, mentally and emotionally. If you don't know a fact or answer, don't try to fake it. If you are exhausted and too tired to campaign robustly, then you are more likely to make a mistake or gaffe. And, if you are close to tears every time you talk about your family, the audience will wonder why you aren't home with them.

Watch out for detractors, especially women detractors. Women candidates report an increasing number of women who are harder on women candidates than men candidates. They do not want to be taken for granted, or they may have their own reasons for not supporting you. These are the rejections – women we thought were friends – that hurt the most when they don't support women.

Look for energy sources: a power nap in the car, a latte stop late afternoon, a call to your mother or dear friend, a walk or run outside, or a quick shower and change of clothes. What gives you a boost? Note: booze and fast food don't do it.

Don't take bad bait. When your opponent or a member of the media throw out a question or comment that pushes your button and makes you mad, don't come steaming back with an angry retort. Give them a "there you go again" response, a smile or other de-charging comment and get back on point.

Remember that emotional responses always trump the factual, informational response. If someone accuses you of killing babies because you support a woman's right to choose, you should not recite the number of young women who go on to have their babies out of wedlock along with the corresponding welfare impacts.

Look positive while you're killing 'em. Be professional in your tone and demeanor and clarify with words. Being a "pro" at "controversy" means you don't lose your cool even when you are outlining facts intent on damaging your opponent. Staying conversational and genuine, using passion to persuade sparingly.

Use props and visuals where you can. Video's of your life which precede your comments, that's good. Power point presentations of the state of the city budget, that's bad.

Don't wear out your welcome; people don't want too much information, they want enough. One message, three points or issues important to you, and an early conclusion. You don't have to use every moment given you; be the only one who doesn't go over the allotted time limits. Dare to be brief.

Chapter 12

Volunteers

You cannot pay for all the work that needs to be done in a successful campaign. Even if you could, the rapport you build with people who volunteer is an insurance policy that they will show up – and they will influence the choices of their circle of friends and family.

However, yesterday's key volunteers – women – are not nearly in as large a supply as they were even a decade ago. The reason? More and more women have gone to work. Our families today often require two incomes, leaving fewer people to be the volunteer campaign work horses.

This makes it even more important to know how to recruit volunteers – and how to make your campaign more convenient for people to help. The Internet now allows us to communicate more often, and more quickly than before.

Personal contact from the campaign to the voter wins votes and campaigns. How does a campaign achieve this personal contact via mail, doorbell ringing, phone calls etc? Through volunteers! Most voters can remember a time when a candidate or a volunteer for a campaign visited their doorstep or they saw an active campaign rally on TV or in person. Making this positive and personal contact is essential. If the volunteer is enthusiastic, informative and appears to be having fun, s/he will have won over that voter for years to come. It is truly difficult to overestimate the importance of volunteers in a campaign.

Political campaigns rely heavily upon the hard work of their volunteers. In fact, many have failed because they did not know how to organize, treat or include volunteers in their organization. With all the campaign technology on the market today to structure how those volunteers are used, it is imperative that you have a plan and a process for putting meaning and muscle into your people machine. The days of grassroots campaigns which are mostly smoke and mirrors are over. The press, the political insiders and most importantly, the public will know if you really have a strong volunteer army or if you're just talking in grassroots terms that have no substance in the facts of your campaign.

This chapter will answer three key questions that will help you to win your campaign through utilizing volunteers.

Why are so many people drawn to campaigns when volunteers receive no pay and few end up on the payroll of elected officials?

How does a campaign recruit and keep reliable volunteers?

How to manage a volunteer.

Campaigns give people a chance to make a difference; they give voters a way to be involved in their government and get to know their representative in a personal way. More importantly however, is that campaigns are just plain fun. Campaigns bring people together for a purpose as well as a dedication to a vision. While most volunteers may initially become a volunteer because of the principle, they will only stay (and be reliable) if the campaign is fun. This chapter will help you to understand how to accomplish a successful and organized volunteer plan.

The Volunteer: Work Horse Of The Campaign

Volunteers are those wonderful people who want to help you and your campaign get the work done. Most are selfless women and men who find fulfillment in the political world of campaigning for office. They may be attracted to the campaign for several reasons:

- **They are the political junkies of the world;** they love the excitement that comes with a campaign. Many have been working on causes and candidate elections for several years.

- **They are people about to reenter the job force**, women or men who have been helping to raise small children at home but now want to start building a life outside of the home.
- **They are people who have been going through some tough times** either in their professional or personal lives. Some volunteers are looking to the campaign to help fill some of the voids in their lives. Campaigns are great places for people to find needed self-esteem.
- **They are young people** looking for opportunity and senior citizens who know they still have much to give but few places to go that will welcome them as warmly as a campaign will.
- **They are people inspired by the candidate:** friends, family, neighbors and close supporters who believe strongly in the political future of this particular candidate. Almost all people attracted to their first campaign are traditionally driven by a desire to help one specific candidate or cause.

All volunteers have one thing in common, their enthusiasm. They are dedicated to a campaign and require tender loving care. But, for their time, energy, money and creativity, they also receive many benefits. First and foremost, they were desperately needed and were appreciated. A good volunteer coordinator (next subject) recruits new workers by acting as a marketer and knowing how to offer the many benefits a volunteer will get by working on your campaign. For instance, they:

- Receive training and education on key issues of the day; they learn what shapes public opinion and community decisions.
- Learn new techniques for their own time management, organizational development and leadership potential.
- Meet lots of new people who can help them network into new circles of business, personal and civic relationships.
- Work with people who can serve as future references for professional pursuits and other interests.
- Find fulfilling assignments that are fun, challenging and may become the highlights of their lives.
- Get an opportunity to manage projects from beginning to end using their own creativity, resources and talent.

Treat volunteers with the respect they deserve, but remember that most are responsible adults. Give them permission to make mistakes and be strong enough to admit they are right when the occasion presents itself.

The Volunteer Coordinator

The volunteer coordinator job is two-fold; it includes organization and marketing. This person has to have the winning personality to recruit reliable volunteers. She will then create a volunteer database and the entire inventory of jobs that need to be done. She figures out where to recruit enough volunteers to meet the needs of all the campaign's projects. She trains as well as supervises the volunteers to insure quality control of the many concurrent projects. This is an all-encompassing job for a special person.

An important reason to have a volunteer coordinator is that there will always be competing needs for volunteers. If total anarchy rules a campaign, then volunteers take the first project that comes along. A volunteer coordinator can prioritize the many campaign projects and then help find the best, more experienced, willing or dependable volunteers to handle each particular project.

A good volunteer coordinator will also have a good working knowledge of what her volunteers like to do. She will suggest volunteers who can effectively take on more responsibility as well as those whom the campaign should steer away from handing more work. A good

volunteer coordinator will know never to ask a volunteer to do work that s/he does not feel comfortable with because this will only make the volunteer upset and the task will probably not be done correctly.

The volunteer coordinator needs to be organized and efficient but she also needs to have a glowing, extroverted personality. It is her job to get people to work for free and enjoy doing it. She needs to be able to read people and gauge their strengths, weaknesses and interest in a project without the volunteer having to even speak. It is her job to make this campaign organized and fun for the volunteer. There is nothing that will turn off a volunteer faster than a disorganized mess of stress. Of course all campaigns have an element of disorganization but it should never be chaos and it should *always* be fun. Choose your volunteer coordinator carefully.

Where Do You Find Good Volunteers?

They don't grow on trees and they don't drop out of the sky. Good volunteers come from two major backgrounds: ones who have worked on other campaigns and those who have not. Each campaign will have many people who will fill the late-night hours with war stories of what happened in another campaign. Yet, there are just as many newcomers who are attracted to a campaign for the first time. A good campaign has both.

The job of a volunteer coordinator is to go to familiar places to find volunteers: former campaigns and party activists' lists. These volunteers will have various degrees of campaign experience and a willingness to do the mundane tasks, the campaign grunt work. Beware of the volunteer who says he doesn't do grunt work: these are people who seldom make good role models. In a campaign, everyone makes the coffee and everyone shares the glory. Places where you can find campaign experienced people include:

- **Local Republican, Democratic and Other Party District Meetings:** Most districts have organized, local party meeting organized by districts. You will find the real political junkies here. This should be one of your first stops for experienced volunteers.
- **Local Party Precinct Officers and Members:** these lists are available from the state and county parties as well as from local label or list vendors.
- **Previous Campaigns in Your Area:** talk with elected officials who have endorsed you (particularly those who are not up for re-election) and ask them for their list of volunteers. Look for names you know or have the volunteer coordinator call them all. In many cases, the elected official can be talked into hosting a meeting of her best volunteers to entice them into your campaign.
- **State Party Caucuses:** State parties have official campaign committees, clubs and special caucuses which are year-round commitments to strengthening the party. Speak with these groups, including women's clubs, youth clubs, and geographic district organizations.
- **Endorsing Professional Organizations:** In every area, there are professional groups that always endorse and most often send workers to help back up their endorsement. These include government employees, teachers, the local AFL-CIO unions, lawyers, and firefighters. Call the local political director or executive director of the important groups in your community to find out what the endorsement procedure is for your race. Then, instead of waiting for the endorsement, start getting some key supporters from these groups. With the endorsement may well come many volunteers.
- **Women's Organizations:** In this day of increasing awareness of how few women have been elected to public office, go to the women's organizations in your town and get them involved early. These include your local chapter of the National Women's Political Caucus, Business and Professional Women, the American Association University Women, the National Organization of Women, the YWCA, and the National Abortion Rights Action League, to name a few. Ask your early supporters if they are members of these groups, then ask if they can obtain a list of active members. To get volunteers from

these groups, have a member who is your supporter hold a small meeting of other members and recruit them with special volunteer tasks.

After seeking help from people traditionally more politically active, look for those who are not as experienced but perhaps more enthusiastic. A person's first campaign can be her most rewarding, as the newness of it coupled with the excitement can rally a new volunteer to give 150 per cent. New volunteers seldom know how to pace themselves and give lots of time.

- **Key Friends and Relatives:** The people who are closest to and most inspired by the candidate will all want to be an active part of the campaign, as a part of their pride will be on the line with the candidate.
- **People who do not have jobs away from the home:** Women and men who are raising young children or whose spouses are financially able to provide for the family, make great potential volunteers. These people can be found in local parent/teacher associations, local homeowner groups and in the neighborhood where the candidate lives.
- **University Students:** Young people involved in student government, the newspaper, sorority and fraternity boards as well as civic groups on campus are great potential volunteers. In fact, many political science, speech, communication, public administration and other classes urge their students to get involved in campaigns. Some will have official intern programs which will allow academic credit for specific work done on a campaign.
- **High School Government Classes:** Students who are the children of active political workers are frequently interested in campaigns long before they graduate from high school. Look for young people who come with their parents to the headquarters, campaign events and other activities. Devise a strategy for their involvement. Even if these children and young adults just wave signs in local parades and rallies, they serve as a great message of the wide range of people and interests your campaign attracts.
- **Good Government Groups** (Common Cause, or League of Women Voters): There are groups dedicated to cleaning up the political process. These groups seldom endorse a specific candidate, but if you are a candidate who is talking about clean government with more accountability, the key people in these groups are likely to work for you if asked. Attend one of their meetings. Have your volunteer coordinator call the important people who acted interested in your candidacy.

How Do You Recruit Volunteers?

Once you have contacts and supporters who can lead you into organized groups of potential volunteers, you need to have a strategy for recruiting and attracting them into your campaign. Before you meet with them, have your plan ready. Always have a kit of material designed to answer any questions potential volunteers might have about the candidate, campaign or other key players.

The Volunteer Recruiting Kit Should Include:

- Recent press clips of the candidate and her issues.
- Biographies of the candidate.
- Brochures that explain her campaign platform.
- Volunteer forms which will record all pertinent information about the volunteer (usually a campaign return envelope can be used).
- A list of the key campaign staffers and steering committee.
- A list of upcoming scheduled speaking engagements and campaign events where volunteers can hear the candidate or volunteer to work on upcoming projects.
- A list of the likely jobs that require responsible workers or organizers.

Now that you have a list of potential volunteers in front of you, and you have material that can answer all their questions, how do you get them to sign on the dotted line as active workers?

The most obvious enticement to potential volunteers is a well-organized campaign. If you can present the campaign as a well-planned timeline for action, with a variety of projects and an opportunity for everyone, and you can explain it with enthusiasm, commitment and confidence, you will be well on your way to getting volunteers.

- Give them ideological reasons to get involved: “each person really can make a difference; the changes we need to make require leaders such as this candidate; and it’s time for all of us to take the election process seriously and do something about it.”
- Give them practical ways to get involved: “there are three phone banks which will require people like you who can give us three hours on these three days.”
- Give them training and an explanation of how their work fits into the strategy for the entire campaign: “these phone banks will identify 4,200 voters whom we believe are the swing voters to determine the election outcome.”
- Let them know how you intend to win: tell them how much money you will raise and how; what the field strategy is; and how you intend to use paid commercials and the press to get your message out to would-be voters.

Putting Your Volunteers To Work

You have recruited the best and brightest to help you win this campaign, now what? You need to put your volunteers to work. First, you need to have the right person (usually a campaign manager or volunteer coordinator) determine where she fits in your campaign and what strengths and potential weaknesses s/he brings to the table. Second, you need to successfully manage your volunteers. Managing a volunteer can be tricky because you need to make sure s/he is productive for the campaign, but is also having enough fun so s/he comes back. With any volunteer activity, reliability will be an issue to consider. You need to anticipate undependability so it does not effect your campaign organization.

Determining Where Your Volunteers Fit

Once you have volunteers ready to go to work, you need to quickly determine where they best fit in. Good volunteer coordinators as well as campaign managers need to be able to quickly extract information from a person that will help the campaign know best where to place her or him.

Know which projects you need help organizing. Also know which jobs in your key management team could be filled with particularly competent new volunteers. Know what you’re looking for and then develop a drill that allows you to gauge for yourself how new volunteers might handle important tasks.

Here are some questions that might help you evaluate a volunteer when you ask them about themselves:

- What campaign/organizing experience have you had in the past? Which campaigns have you worked? Did these campaigns win or lose? Why? What did you do: Fundraising? Phone bank or canvassing? Advance or scheduling? Working in a campaign office? Working on issues? Working with the press? Working with local political leaders? Working with special interest groups? Which ones?
- What technical skills do you have to offer? Computer programming? Working with printers? Artistic, design or graphics ability? Camera or videotaping skills? Access to loudspeakers and public address systems? Desk top publishing e.g. fliers, campaign newsletters?
- How are you at working with people? Are you a member of a special interest group? Have you experience in working well with young adults, seniors, or other people attracted to a campaign? Do you have a good sense of humor? Are you flexible,

dependable and loyal? What is something you can tell us about yourself that won't show up on any resume?

- What is your campaign potential? Are you creative? What are three characteristics that come to your mind when describing yourself? What kind of time commitment might you be able to give to the campaign? What are the other time commitments and personal obligations that you have in your life? Are you being realistic about your commitment? Are there certain things you would not do for the campaign?
- What would you like to do for the campaign? What experience do you think is relevant for the job you would like? Whom would you ask to help you? Could you get other resources to help you accomplish the project or job? Do you usually choose a task, accept a task or create a task?
- What do you think the campaign will do for you? Are you expecting a job out of your volunteer efforts? Are you hoping to learn a new skill? What? Do you want to run for office someday yourself? Will you require a lot of autonomy in getting your work done, or are you willing to share leadership roles?

There are many factors to gauge as you recruit for the campaign. No matter what the size of the campaign, you will need leaders who can assume responsibility and be dependable for accomplishing lists of things to do. As you find these potential leaders from your increasing crop of bright volunteers, don't be afraid to trust your instincts. In most campaigns there are more than two dozen mid-level managers.

Whenever possible, attempt to extract as much information from a volunteer as possible before you even mention a potential responsibility. In most campaigns, a manager is most apt to place a new volunteer into the position that is most pressing at the moment. A better process might be to have a full list of positions in mind that are going to be necessary in the upcoming months before you quickly assign a person who seems like she has a lot of potential.

Managing A Volunteer

The goal of the management team is to find the highest and best use of each volunteer and resource. Once the volunteer coordinator has determined what the highest and best use of a particular volunteer is, she needs to work out a schedule for performing the responsibility. If the volunteer is to assume a project, then the two should agree on an outline of hours, what the job entails, expectations and deadlines. However, if you are asking a volunteer to handle a major area of responsibility or project, you need to both agree on the job to be done, the line of authority, the resources available from the campaign, the time frame, the budget, other personnel restrictions as well as the key points where review will be necessary.

A volunteer has the right to know you are delegating a job to her without fear that it will be given to someone else later. If a volunteer handles the job correctly, she should expect to have that responsibility until the end of the campaign.

On the other hand, if the volunteer does not respond well in the job she is assigned, you need to discuss problems, suggest changes and improvements as well as monitor her progress. In most campaigns, volunteer coordinators assume they must accept less than quality performances from their volunteers because they are not paying them. However, if you set high standards and expect more from volunteers than they expect of themselves, you are more likely to get quality performance than if you casually dismiss shortcomings.

Always keep in mind that these wonderful people are helping you for fun and fulfillment. Make sure you continuously pat them on the back and tell them how much you appreciate them.

Dealing With Unreliability

Always expect dependability and excellent work from your volunteers, but remember that volunteers are working for free and will sometimes (a lot of times) be unreliable. There are a few rules that will help you gauge reliability and keep your campaign organization on track.

- Never ask a volunteer to do something that she does not want to do like walking door-to-door or making lots of phone calls for example. Obviously campaigns are a catchall game and people should be prepared to get a taste of everything. However, if you try and force a volunteer to do something s/he is uncomfortable with s/he will become increasingly unreliable and disinterested with the campaign and the task will most likely not be completed properly.
- Even though you have the most reliable, wonderful volunteers, keep the 50% rule in mind for planning purposes. Always assume that 50% of your volunteers will not show up for whatever reason for any project. Like it or not, many times volunteers do not show up. If you plan ahead you will be on target and maybe slightly over the target for people needed for your event/project.
- When calling through your volunteer list remember to make notes. If someone who has pledged to be a volunteer has either not shown up or declined an event more than three times in a row, you should not expect this person to help with future events.

Volunteers are your secret weapon and most important tool in accomplishing all the grandiose plans that are routinely planned for every campaign. You need to respect their needs and let their creativity be an integral part of your game plan. If you do, your volunteers will be the field force that gets you past the paper plans to the reality of a real grassroots team.

What Your Volunteers Can Do Right Now

Short Term Projects/Events

- **Phone banks:** These run three hours a shift on weeknights and weekends, usually at a local law office, labor office or political party headquarters. Phone calls will be made from computer lists of telephone numbers to remind supporters to attend events and fundraisers, or to identify supporters for purposes of the Get-Out-The-Vote effort in the last week of the campaign.
- **Internet Research:** There are media reports, voting records, issue research and just simple responses to the e-mails you get that are great jobs for volunteers. In fact, with so many people having computers at home and at work, there is ample opportunity for people to be able to volunteer away from the campaign office. Given the tough time people have finding time to volunteer, the Internet and computers allow for people to work when they have the time – without taking time-consuming travel to an office.
- **Mailings:** These run two to four hours during the day and on weekends usually at the campaign headquarters or a volunteer's home. Mailings are to raise money or raise visibility for the candidate. Letters are placed in envelopes with a return envelope, then sealed (usually with wet sponges), labels are placed on the envelope, and each piece is sorted according to its zip code number.
- **Web site Help:** Most volunteers are highly skilled. Having a volunteer help to either build or maintain a Web site for a smaller-scale campaign will save the campaign thousands of dollars. However if you rely on a volunteer to build and maintain your Web site, check their references to be sure they have adequate technical training.
- **Door-to-Door Canvassing:** These run three to five hours a shift usually on weeknights or on weekend afternoons. The volunteer is given a list of specific names and addresses in one area, as well as a map of where these voters live. The volunteer goes door-to-door asking residents if they support our candidate. Most will not have decided, so the volunteer will leave an informational brochure.
- **Yard Sign Construction and Placement:** This area could include four different tasks: stapling the yard signs onto small wooden sticks; soliciting yard sign locations from residents in key locations; putting the yard signs up; and maintaining them after they are damaged or stolen.

- **Data Entry:** Almost immediately we will need to type the names and addresses of all the volunteers and contributors into one central computer which will be located at headquarters. Anyone (even the slowest of typist) is urged to help with data inputting.

Regular/Weekly Projects

- **Helping to put together the master schedule:** Although there are many invitations that the candidate will get, we need to aggressively solicit other invitations to organizations that need to hear from and support her. This requires calling each identified group important to the campaign (there are at least 30) and asking if she can speak, stop by to be introduced or answer questions from the membership.
- **Arranging the press clips:** There are several major publications in town and all have to be monitored. Those stories that quote or are about our candidate, or those important to her “issue agenda” will need to be clipped and arranged so that they copy clearly. The press needs to be mailed copies of the good news clips often, even if they come from publications less well circulated. See if the publications are online. If so, this can be easily cut and pasted into one file. And don’t forget about keyword searches.
- **Coordinating Neighborhood Coffees/Wine and Cheese Hours:** There are wonderful supporters all over town that can introduce our candidate to their colleagues and neighbors. Someone needs to insure that each one is organized. The candidate, volunteer coordinator or volunteer could sponsor one or help coordinate several others. We have checklists to help you plan and keep important deadlines.
- **Advancing Events:** People are needed to arrive at specific events prior to the candidate’s arrival to place yard signs along the entrance way, put up the banners and perhaps some balloons inside the meeting room. They can also set out literature and arrange for a sign-in sheet table. These people then need to arrange to pick up all the literature remaining after the event. These folks can also help by providing refreshments for headquarters’ mailing parties or the phone banks.
- **Handling the Thank You’s:** The contributors as well as the volunteers need to be thanked soon after their donation or hard work.

Ongoing Projects

It is helpful to not think of these groups in the formal sense, but as a group of friends or people whom you know will help with events, visibility, finances etc.

- **The Events Committee:** About 15 people are needed to create, plan and implement a full schedule of events designed to raise money and visibility for the campaign. These include spaghetti/chili/potluck dinners, fun runs, family picnics, celebrity dinners, auctions, rallies, street dances & parties, and anything else that the committee may create. The committee is responsible for making sure all the details of each event are accomplished on time and with the quality that is the trademark of the campaign.
- **Peer Group Networking:** There are special interest groups in the nearby area. You need to identify people in as many of them as we can find. Each peer group coordinator will be responsible for setting up meetings, letters or phone calls between the candidate and key members of the special interest group. These include specific labor unions, professional organizations, environmentalists, women, people of color, seniors, young voters, local partisan party groups, neighborhood associations, business associations, the gay community, education groups, and many others.
- **Finance Committee:** The Finance Committee is one of the most important projects a volunteer can undertake. We need people who will pledge to raise several hundred or even thousands of dollars during the course of the campaign. To make this job as easy as possible, we will meet often to continually update the Finance Committee on all the important aspects and news of the campaign. Finance Committee members will be trained as deputy treasurers and given tips for raising money.

- **Field Committee:** In the citywide organization, this committee will be responsible for organizing each neighborhood. In addition to the District party endorsement efforts, the field committee will help coordinate the door-to-door efforts, the phone banks and the yard sign location solicitation and placement.
- **The Visibility Squad:** When the candidate attends public events such as the folk festivals, football games, neighborhood street fairs, parades, ceremonies, and other places where hundreds of people congregate, it is important that a small group of people go with her to show support and create momentum. These people shake hands with passers-by, wave yard signs, carry balloons, wear campaign T-shirts, and hand out literature, if appropriate. These events can last from mid-Saturday morning to late Sunday evening, but they are among the most enjoyable activities of the campaign.
- **Opposition Research/Issues Committee:** Four or five people with expertise in specific issue areas are needed to help the campaign with research and innovative ideas on subjects from crime, growth management, education, children's programs, homelessness, low income housing, transportation and economic development. In addition, there will be numerous questionnaires that will come from different organizations. We will need a resource bank of people to whom the candidate can turn on a number of policy issues. Opposition research is critical to today's campaign. You will need to sift through volumes of past voting records, newspaper clips and papers as well as other resources. Some opposition research members will attend all the public-speaking events of your opponent and perhaps even visit the opponent's campaign headquarters. This group will meet as the need arises, or members will be assigned specific "research" missions.

When The Campaign Is Over

Candidates frequently forget the real people who put them in office: those wonderful full-time and part-time volunteers who give selflessly and determinedly through all the many frustrating times of the campaign. It is often said that if the candidate would spend one-one hundredths of the amount of time thanking the volunteers as the volunteers do working for the candidate, every volunteer would come back to work on the next campaign. Needless to say, this infrequently happens.

Candidates' Responsibilities To Their Volunteers

Candidates should listen to their volunteers. This can be easily arranged at a time and place periodically during the campaign. Volunteers can then talk openly with the candidate. The candidate doesn't have to take all the advice, she just has to listen and understand what the volunteers are saying.

Candidates should remember the names of the volunteers who staff the office (a policy requiring volunteers to always wear name tags can make this an easy responsibility).

Candidates should take personal time to take the key volunteers to lunch to thank them for all the wonderful work they are doing.

Candidates should learn a little about the interests, families and problems of their volunteers. Often the candidates assume too much from these volunteers. Personal consideration is all most ask.

Candidates should get and give feedback about volunteers to the volunteer coordinator and campaign manager. Even if the candidate doesn't have time to personally thank each volunteer for each event, the campaign staff can relay the candidate's appreciation.

Candidates should phone the volunteers even after the headquarters is shut down and the yard signs have been stashed away for the next election. Whether the candidate wins or loses, she owes it to her key volunteers to stay in touch.

Candidates can never say thank you enough times. Repeat it early and often each day and every day.

Chapter 13

Voter Contact

The best field operation in the world cannot make up for the name recognition you can receive from broadcast advertising. TV and radio ads now account for more than half of the dollars spent on political campaigns. Broadcast media is far more expensive than other items in your budget, but few other investments result in as many votes.

And, with more than 55 percent of the good voters in the country having access to cable TV, broadcast has become as affordable as radio buys.

Television, cable TV and radio allow a personal connection to be established between the candidate and the voters. Produced ads need to be well thought out, well produced, and well distributed. If any of these three characteristics run short of your goals, it is possible that more damage than good may come from your broadcast investment. The power of broadcast media is so dominant in campaigns that you may need to limit other campaign costs in order to finance the best possible broadcast strategy.

What Can Paid Media/Advertising Do For A Candidate?

- Make the voters aware of the candidate by raising her name recognition. Many women start with a disadvantage of not being well-known.
- Touch an emotional chord with voters, convincing those who are infrequent voters to vote in your race.
- Persuade undecided voters to make a decision. Since many voters remain undecided until the last days of the campaign, the last minute onslaught from many TV and radio ads is responsible for converting thousands of voters to one candidate.
- Reinforce your voters' support and make them more comfortable talking about you with their friends and colleagues.
- Convert voters from your opponent. Negatives, including negative advertising can do this.

Advertising Objectives

To determine what form of media, or combination of media, you need for your campaign, first determine your objectives for using any of them.

- If you are an incumbent, your objective will be to remind people you are their incumbent, and that you have always been there for them when constituency problems arose. You may want to remind voters to vote on Election Day instead of taking the election for granted. As the incumbent you have a solid base of support in the district. You may want to deliver a message designed to make your voters feel they are already part of a winning team.
- If you are running against an incumbent, your objectives will include pointing out the problems with that incumbent. You can state that the incumbent is unresponsive or less aggressive than you will be. You may also point out that the district needs a change.
- If you are running for an open seat with no incumbent, you will want to build name identification and establish your uniqueness for the position. If there are several people seeking the office, you need to stand out from the crowd and focus on specific target populations.
- If you are running significantly behind in the pack or way behind the incumbent, you will want to consider ads that point out the shortcomings in your opponent's public track

record. These so-called “negative ads” will be fair examinations of the record but seek to raise questions about the judgment and record of your opponent.

- Before you determine which media is best suited to you, have your targeted audience in mind, know what media they respond to and select the best media for the money available. The most common choices to consider are radio, television (including cable TV), billboards, and direct mail. All of these will have to compete with the money you will have to spend on other campaign promotional material such as bumper stickers, yard signs and buttons.

Television: The Emotional Media

Television advertising is the most dramatic of all mediums: you can see the candidate and listen to what she has to say. Not only can she communicate her message, but more importantly, she can look into the eyes of her voters and try to connect with them. Voters are more inclined to vote for a person they can recognize on the streets.

An effective ad catches the attention of your voters:

- It offers a relevant message developed in a creative way.
- It is produced in a clean, crisp professional format.
- It is repeated numerous times in front of your targeted audience.

As positive as television can be, it can also pick up insincerity, or a candidate “performing” as opposed to talking. Television not only reaches the voters’ emotions, it invites them into the campaign. TV specialists tell stories of candidates who won votes due to their smile, friendly off-hand remarks, body language or sense of trust and honesty the voters gleaned from the candidates’ eyes.

Others respond to a candidate’s looks: how she dresses and how she sounds. A candidate can set the tone and have a tremendous impact on the dominant issues of the campaign through her TV commercials. If she can establish the agenda and can force her opponent to react to her, she places herself on the offensive and keeps her opponent on the defensive.

When TV Works

Television is the perfect medium for reaching large numbers of widely dispersed voters. Its major drawback is the cost. A TV message needs to be targeted and repeated to be effective.

- If your objective is to persuade undecided voters, then TV is the best choice since it is the most pervasive and most persuasive medium. It provides a personal connection that can make the candidate believable and real.
- When reminding voters that you are the incumbent, TV sends an emotional message that makes you appear to be an old friend of the family. Some TV ads also build a sense of appreciation for the incumbent, making the audience feel grateful they have you for an elected official.
- When taking on an incumbent, TV can build momentum, capture energy, generate excitement and help create the image of a fighting challenger who is taking on the establishment.
- When you are falling behind in the polls, TV advertising is the quickest way to stop or reverse the slide. Sometimes done through negative ads, these advertisements can give the voters a reason to question their earlier choice of your opponent. However, negative TV ads can backfire against you if you do not give voters a reason to vote for you. If you convince them not to vote for your opponent, you may convince them simply to not vote. In fact, many political analysts have theorized that the reason election turnouts have dropped in recent years is due to the increasing number of negative ads.

The campaigns best suited for TV advertisements are ones with large budgets. If your opposition is making large television buys, then you will be forced to do the same, even if you

cannot dominate the media. If you are suffering from a large “unknown” factor where your name recognition is far less than your opponent’s, you will be forced to make TV time buys.

Popular TV Commercial Themes

The message, theme, style, and tone of TV commercials will not be the same for every candidate. The tone and content of the ads reflect the style and personality of the candidate. If she has a dynamic personality, an intense passion for issues, personal and warm feelings about people, a good sense of humor or a strong image of leadership, those characteristics need to shine through. However, be very careful. If you attempt to portray the candidate as something she is not, the public is likely to figure it out quickly.

TV can reveal all those less appealing physical and personality traits. Even the greatest TV producers in the world cannot hide an insincere phrase or smile. The decision to run an ad should depend upon whether or not it portrays something that is honestly you and appeals to your targeted voters. This does not mean you have to think of all the creative ideas, great phrases or interesting concepts. It does mean you have to be sure you look genuine, relaxed, honest and strong enough to be the leader your voters would elect.

There are a number of examples of effective political ads. Some frequently used ideas include:

- **The endorsement ad.** A number of well-known officials or people on the street are interviewed on videotape, talking about why the candidate is a great person, and why she should be elected to office. This is very helpful in building name recognition.
- **The biography ad.** By taking past newspaper clips, photos and slides of the candidate’s past, a brief and compelling visual collage of the candidate’s history and character can be created. This may be important to introducing the candidate to targeted voters, particularly if she is taking on an incumbent.
- **Straight talk ads.** In these ads there is a close-up picture of the candidate explaining her issues or talking about her reasons for running. This is a great format for persuading swing voters.
- **The constituency story.** Someone in the district reveals a personal story of how the candidate has helped her out. This is great for incumbents who are under attack from a challenger.
- **On the campaign trail.** The candidate runs from speech to meeting to campaigning door-to-door to picking up her kids at school. This momentum spot is great for candidates who are running against long-standing incumbents.
- **Excerpts from speeches.** The candidate has given a speech or has been on a recent talk show or TV debate. An excerpt from the speech is edited down to a 30-second spot. This is a low-cost ad that captures the candidate sounding like a leader, and it helps raise name recognition and persuades voters.
- **Cartoon or caricature ad.** This is not often used but very effective in countering negative ads leveled against the candidate. By poking fun at the negative side of campaigns, incumbents have been able to stave off attacks from strong challengers.
- **Negative Ads.** These ads seldom feature the picture or name of the attacking candidate in them. Rather they are metaphors that seek to exaggerate a point, emphasize a record or interpret a fact from the opponent’s background. Symbolic figures, objects or even animals are used to attack the candidate. These ads are most effective when a candidate is running behind in the polls.
- **The comparison ad.** If the candidate is running against another elected official who has a public record, the comparison ad can compare and contrast your record and your opponent’s record. If your targeted voters have majority opinions on major issues that are different from your opponent’s voting record, the comparison ad might work well.

TV Production

Most ads run 30 seconds, one minute or five minutes in length. There are new ads being produced with a 10-second format. These remind voters of key phrases or they take specific sound bites from lengthier ads. They are being used successfully by incumbents who already have significant name recognition with the voters.

Although professional TV production will not save a poor concept, insincere candidate or a boringly predictable script; good, professional production can give your strategy the sparkle it needs to make the voters take notice. Remember, the more money spent on the production of an ad, the less money you will have to spend on placing it. Repetition is the key to any ad's success.

Production costs can range from \$500 to \$2,500 for a film or videotape spot. The cost will depend on the location, number of cameras, lights, talent you might have to hire, graphics, music, animation and agency fee. You should not spend any more than 10 percent on production costs. If you have \$20,000 to spend on TV, then your production costs should be no more than \$2,000.

Not all campaigns should use television. Most candidates running for state office will likely be in media markets where the jurisdictional lines cross over into another district. One candidate's ads could be hitting thousands of voters in another jurisdiction. The cost and the confusion in advertising in a large market may not make TV advertising the best investment to reach your targeted voters.

As television must be repeated in order to be effective, campaigns need to have the money to purchase enough TV time for your viewers to see your ad a dozen or more times. If you cannot afford to run an ad frequently, save the money for radio or direct mail voter contact.

Cable TV

As many as 50 percent of the voters in some districts are served by cable television. These ads are very inexpensive; sometimes as little as \$10 will purchase one 30 second TV spot. However, the number of people who will watch these spots may be negligible. It is critical that you know the exact target audience watching these shows before you invest even \$10 for the spot. Cable TV does allow for specific targeting of potential voters. Cable TV sales departments have reports and ratings that will help you clarify what voter audiences are watching.

But keep in mind that you cannot purchase time on every station. In fact, in many areas you will only be able to purchase time on four or five stations. These stations may include a rock video channel, a cable news station, a sports station and local community channels. Determine the audience profiles that most closely match your targeted voter profile.

Good cable advertising dollars are spent on special local events where the local stations may cover the action such as local football games and other special sports events.

Timing

You can use TV ads to introduce your campaign to the public when you want to build early name recognition; early TV ads show early donors that you are a credible candidate.

Most campaigns save their TV ads for the conclusion of the campaign when a large percentage of voters may still be undecided. Campaign spots usually start two to three weeks before the election and increase in frequency and length, building intensity until the day before the election. If campaign ads critical of your opponent are used, you will want to soften the message as election day approaches and leave the voters with a positive impression of you as they head to the polls.

Even though you may not be airing the ads until the last week of the campaign, you need to secure the time needed to run your ad with a television station before the ad is actually completed. Key time buys, starting from Election Day and working back, should be purchased as soon as you have the money. Most campaigns make their time buys two or three weeks from

the date they anticipate the spots will begin airing. However, some campaigns want to keep their time buys secret for strategic reasons; they might not want the opposition to know when they are going to begin running TV ads, as it might trigger the opposition's time buys. So they will hold off making the time buys until the day before the ads are set to begin. In other cases, campaigns wait until they have raised as much money as they can for TV placements and then purchase the ads to start as soon as the TV stations can get them on the air.

Targeting Your TV Time Buys

You don't decide where to place your ads based upon the TV shows you like to watch.

You target the placement of the ads based upon a review of the TV programs your swing voters are likely to watch. Find out what your voters are watching and tailor a message for them to see as a lead in to their favorite shows.

The sales department of each TV station has large volumes of reports which show profiles of what kind of voters are watching particular shows. Ask the sales representatives of each major station to give you a summary of what shows are best for the people you want to target.

For example, senior citizens or parents who stay home with their young children may be TV viewers you can target with daytime soap operas. Younger voters might be reached through some of the more popular sitcoms, comedies or dramas of the season. Blue collar workers may be reached through shows such as *Roseanne* (reruns) or specific late night comedy talk shows. Well-educated voters may be interested in documentaries, *60 Minutes* and other more news-related shows. Again, certain cable channels also cater to target audiences. Watch for Lifetime's television for women and TBS and TNT's programming for male audiences.

Don't buy shows helter-skelter and across the board. Pick the stations, then the programs and finally pick the exact placement for the right spot. If your campaign's TV time buyer doesn't understand this, then your money may be wasted.

If you are going to train someone to be the campaign's time buyer, there are a few things they will need to know:

- Know all the station ratings as well as the program ratings.
- Know what prime time spots are open to local advertisers.
- Know each station's policy on the lengths of TV spots they will sell.
- Know the special programs that are being planned which may get a far greater viewing audience than the regular programming.
- Know how much air time your opponent is purchasing and find out the targeted audience he is going after with that time buy.
- Check out the locally produced shows (morning talk shows, daily feature shows, etc.) to see if they have a large voting audience.
- See if your local public TV station will accept a contribution in the name of your campaign. Some public TV stations have unusually large numbers of frequent viewers watching specific programs. Although public TV accepts no paid advertising, some stations will accept a contribution to help sponsor a specific show. Of course, you would not want to donate money unless the station agreed to mention, on-the-air, whom the sponsors include.

Radio

Radio advertising is a popular alternative to TV advertising when you cannot afford the penetration that a good TV buy affords. Radio is usually within the financial reach of most campaigns, and the cost of production is very reasonable. Recent studies have shown that women rely heavily upon radio advertising, and make larger radio buys than their male opponents. Radio commercials are used to:

- Introduce your candidacy to your targeted voters and build name recognition.
- Outline the message upon which you will build your campaign.
- Separate your candidacy from your opponents.
- Build campaign momentum.
- Create a sense of the candidate's "presence" for the voters.
- Let voters hear from some of your endorsers.
- Allow you to answer negative attacks with quick response time.

Radio is not a medium to use if you want to convince voters of your leadership through complex issues or explanations. One idea per radio spot is all you get. Neither is radio an emotional medium; it can only scratch the surface of voters' imaginations.

Radio Themes

Radio ads need to run several times before the voters actually register it as a message they hear. Listening to the radio is not an exclusive activity and is less exclusive than reading the newspaper. Listeners often turn on the radio and do other things such as drive their car, clean the house, work in the office or run around the park. Of course, newspapers are often read while on the bus, talking with family, or watching TV, so ads in each medium need repeating.

Keep in mind that all you can hope to do with a radio spot is leave an impression of your name and a short message which includes an identification of the office you are seeking. In most cases, voters hearing your ad may tune out as soon as they become aware that it is a political ad. After repetitive airings, a few people may subconsciously begin to hear it. After dozens of times, then voters may remember it. The more unique your concept, the greater the chance of getting noticed.

Music is important to an advertisement as it helps to convey a mood, and music is what voters are used to hearing on the radio. If you have music that makes the message easier to hear, then you have a better chance of voters tuning into your 30-second spot. Some campaigns will create a jingle, a special set of lyrics designed to get you humming a tune about the candidate. Be careful you don't get too cute with jingles that appear foolish and amateurish. If the music you use is from an already existing song, be sure you seek permission from the copyrighting source. Your local musicians' union can help you with the details.

Radio ad formats are generally based upon a strong voice, perhaps the candidate's, talking about one subject with music playing in the background. Some examples include:

The introduction ad. The candidate introduces herself and explains why she is running. This is a good ad to build name recognition.

The issue ad. A third party voice tells a story about the candidate and why she is running as the music increases in volume. This is a good approach to attract attention and get voters to listen.

The endorsement ad. Well-known voices, women and men, seniors and children, talk about the candidate. This format also helps build both name recognition and credibility.

The neighborhood agenda ad. The candidate announces which areas of town she will be walking door-to-door, giving the impression of a strong grassroots campaign. This ad works very well to help build momentum.

The fast-paced ad. This ad gives a day-in-the-life of a candidate and allows voters to see the candidate on the trail working for them. This is a good format to build momentum and give a youthful, energetic message about the candidate.

Radio Production

Compared to TV ads, radio production is reasonably simple. Almost every radio station will allow you to schedule time to produce a spot. The rates are usually determined by the amount of time you use in the studio. You should plan to spend an hour per spot for production, if you do your homework in advance and agree to a script that you know how to follow.

A radio spot requires a patient production person who will record your statements on reel-to-reel tape. The recording should be done in a soundproof studio. The music or other sound effects will be added later, as will the disclaimer tag (the name, address and whatever other information your state laws require to identify the campaign).

The trick in producing a good quality radio spot is to have the script decided upon before you walk into the studio. Whomever you have as “the voice” needs to be practiced, genuine and relaxed. Voice over consultants provide this service.

The cost for production is around \$30 to \$50 an hour, and with the increasing number of sound studios opening in every community, you can shop for a good deal which should also include inexpensive dubbing of other tapes you will need to bring to the other stations where you have purchased time. Dubs cost around \$5 to \$10 per reel. If you have professionals who can help you, two or three radio spots will cost less than \$200 to produce and dub for every targeted radio station in town.

With radio you can target different messages for different markets. Because production is nominally priced, you can create several radio spots to personalize your approach to certain audiences. You can focus one message to the country western listeners, a more mellow message to the classical radio station listeners, and another message to the news station listeners.

Targeting Your Radio Time Buy

Finding out what radio stations your targeted voters listen to is not difficult. You talk with the sales representatives of the radio stations and ask them what marketing studies each has to convince you to buy radio spots on that station. You should then refer to the Arbitron, Standard Rate or Data reports that are put out every few months. These give the stations’ advertisers a picture of who is listening to what station and provide objective information that you can compare with the biased information you get from the stations. Because there are often several radio stations per community, you can find the best stations that come closest to reaching your targeted voters.

Most voters who listen to the radio choose only one station and leave the dial set on that station. They may have another station set on their car radio, but often the drive time station, the home station and the one they listen to when they are at work are the same. As you do your homework and find your target voters, be on the lookout for those voters who set their dial to one particular station. You are not looking for the station which has the highest listenership or the one which offers the best prices. Nor do you want the station that will let your candidate on their newscasts most often. Instead, choose the station whose numbers best reflect your target voters.

Some generalized radio formats include:

- Stations whose format is news and information. These are usually more educated audiences who tend to be frequent voters.
- Stations with a classical or easy listening format. These are usually audiences of senior citizens and more conservative voters.
- Top 40 stations (those stations with the hit parade music format) have audiences of young voters aged 18 to 25, plus other voters who lead contemporary lifestyles.
- R&B stations which may play a variety of old and new rhythm and blues.
- The baby-boomers who listen to a combination of music from the 60’s and 70’s, and some of today’s Top 40 music. These include new FM stations.

- The Generation X'ers who listen to alternative rock and music of the '80s and '90s.
- Country-western music stations tend to attract blue-collar workers, particularly men.
- Radio listenership for every station is greatest in the morning during what is called the morning drive time, from 6:30 a.m. to 9:00 a.m. The next most popular listening times are the evening drive time from 4:30 p.m. to 6:30 p.m. Your purchase of radio time should be concentrated on those hours. You will have the option of buying so many ads per day, with a limited number in the drive time hours. Most of the marketing studies which the stations use will also have the age and economic characteristics of the listeners. Use this information to determine what specific shows you want to target other than the drive time slots.

Rates For Commercial Ads

When you purchase broadcast time either on radio or television, you are eligible for the lowest rates in town for that particular time of day or size of the audience reached. These rates apply 45 days from Election Day to the time the polls close. This is regulated by the Federal Communications Commission (FCC).

Most stations have two rate structures, one for their national advertisers and one for local advertisers. Local rates are always lower. Stations also offer discount packages of rates depending on the volume you buy. If you agree to buy several spots a day, everyday, then these advertisers can purchase each spot at a fraction of the single spot cost. However, as a political candidate you are entitled to the lowest cost the station offers, regardless of how many you actually buy.

These rates are not always published on the rate card. Although most agencies that purchase time on behalf of a candidate know to ask for the political rates, some of the station's sales people may not know all the facts regarding the FCC regulations. Make sure you ask to see the lowest rates the stations are charging their discount advertisers and the lowest rates they are offering for each time slot of the day (ask for the drive time rates).

Advertising agencies have contracts with the radio and TV stations that allow them to get a 15 percent commission for the commercials they place. If your campaign chooses to research, analyze, select and make your time buys, it is possible for you to recoup the 15 percent savings. But before you agree to do all the work, make sure you are certain you have the expertise and commitment to do the job right. A more reasonable decision might be to have your targeting advisors work with information supplied by the stations so that you can first compose a list of potential programs you wish to consider. If you know a person who has helped buy time professionally, she may advise you on a flat fee basis.

Direct Mail

In our country today, the most popular and cost-effective form of voter contact is direct mail. Direct-mail brochures allow candidates to specifically target the exact voters they wish to reach with a very specific message. It is also affordable, so you can get your message out several times during the course of the campaign.

Direct mail at its worst is just another form of junk mail that arrives with all those other ads and solicitations, only to last as long as it takes to get from the mailbox to the recycling bin.

Direct mail at its best is provocative, colorful, unique and thoughtful. It pulls you into its substance before you realize that it is political in nature. The goal in today's direct-mail market is to produce material that gets read. The average age voter gets between forty and fifty pieces of political or community non-profit mailings a year. A candidate's goal is to produce those four or five pieces that a voter actually reads. To accomplish this, a political mailer has to be the best piece a voter receives that day. This means it has to be more interesting than the department store mailings, the direct-mail catalogs and the grocery store flyer. A candidate's political mailing must stand above all the other so-called junk a voter receives.

Good direct mail is never junk mail.

Direct mail allows you to focus on the individual voter you wish to reach at any specific time in the campaign. With direct mail, a campaign can put a key message in the voter's hand within forty-eight hours. It is a very cost-effective means of turn-around response for anything your opponent may say about you.

A typical piece of direct mail has a turnaround time of about two and a half weeks. This includes concept, copywriting, production, printing and delivery from mail house to voter. Shorter times are possible and have been accomplished many times, but whenever possible, allow for the direct mail to be done in an efficient and not stressful time frame.

Direct Mail: The Advantages

Direct mail is cost-effective and allows you to explain your message many times in a variety of ways that can be unique and persuasive. It can be produced quickly, and it works well in delivering a negative message about your opponent to specific targets, so that not everyone gets the "hit" message.

Direct Mail: The Disadvantages

For direct mail to be effective, you need to ensure that it is a part of a package and done correctly. Direct mail has to compete with a lot of other noise out there: the true junk mail and all the bills, catalogs and coupons that come in the mail every day. Good direct mail must have professional graphics done by people who know how to do political direct mail. (This does not mean someone who has only had experience working for a public relations or marketing firm.) It also has to be coupled with good targeting and quality printing.

Caution: where a candidate wouldn't think of interfering in the production of a television spot, with direct mail candidates tend to get more involved than they ever should be. The purpose of a direct-mail piece is not to put everything you ever thought or knew into it. The purpose is to leave the voters with a simple message that will persuade them to vote for you. In direct mail, as is the case with all voter contact material, less, less, less is much, much more.

Types Of Direct Mail

There are more than a dozen forms of direct mail that are typically used in a campaign. A good voter contact plan allows a candidate to determine at what time which piece and which theme is going to dominate. Among the most frequently used types of direct mail pieces are the following:

Biography: The biography brochure tells a candidate's life story, her qualifications and experiences. The shorter the biography, the better.

Endorsement: An endorsement brochure explains how you are most like the voter. Endorsements are listed. Some list everyone who has ever signed an endorsement card, some list elected officials and key campaign players, along with names from the general population, and some list only celebrity endorsements.

Accomplishments: A candidate's accomplishments are used to show how the candidate has been helpful to people. This is not just a long list of what the candidate has done, but an exploration of what the candidate has meant to the people.

Issues: In today's political climate, experience dealing with issues is a very common theme. Among the issues commonly spotlighted are crime, transportation, education and the economy.

Values: who you are, what you do and what you stand for are all likely themes to be used in a values piece. Values are the back bone of the soul. They tell you what a candidate believes in, what she will work for and how she will accomplish her goals.

Style: Style points, such as working honestly, bringing consensus, listening, taking on the status quo, and bringing a new voice to the table, are something the public likes to see in a brochure.

Demographic: A demographic approach allows a candidate to focus on different lifestyles. This could be seniors, same-sex households, women or working families. Targeting senior or women voters is a traditional demographic theme.

Geographic: In campaigns where there are issues specific to a particular part of a district, a geographic brochure is appropriate.

Letter: Although not as effective as a brochure, the letter format is just what you imagine – a letter, usually typewritten, using both sides of a single sheet of paper. One of the most effective is a handwritten, letter from the candidate's mother explaining why you should be voting for her daughter or son.

Ethnic: In areas where there are clusters of diverse populations, a candidate may want to do a piece that is directly focused at specific ethnic communities. Two or three members of the community may be pictured on the front.

Absentee: Most people in this country who vote absentee are seniors. Thus brochures to this targeted group usually take on a more conservative message and often feature pictures of seniors.

Slate card: Slate cards or sample ballots have become very popular in California and are increasing in popularity elsewhere. These cards recreate the ballot so that voters can see in advance how it is going to look. In California these cards may be produced by organizations or even mail houses. Candidates pay to be on these cards, which could include races from U.S. President down to local dogcatcher.

Comparison: Comparison pieces are very popular. They are sent out in the last days of the campaign and feature pictures and points of difference between candidates. Comparisons are made on issues, experience, contributions, and anything else you might find useful.

Attack: Attack pieces focus on why your opponent should not be elected. It uses your opposition research or other negatives that you have discovered. It graphically depicts your opponent's defects as larger than life.

Response: If in the last four days of the campaign you find yourself under attack, you need a response piece. This piece can attack the attack, divert attention by attacking your opponent on another issue, or humorously dismiss the attack and get back to your agenda.

Printing and Production Process

Many candidates have misconceptions about the time involved in preparing a direct-mail piece. They mistakenly expect a one-or two-day turnaround after they have signed off on a piece. There are many steps to a good production process.

1. **Determine the concept** of the piece, as well as its copy. A good direct-mail consultant will talk to you directly about the concept. You will see a rough draft of the copywriting as it will appear graphically in a brochure. Other considerations include:

Colors: how many colors and what colors?

Bleeds: will the design bleed off the page or have borders?

Size: how big and how many folds?

Printing dynamics: how many pieces can be printed on one sheet?

Run size: how many pieces will be printed?

Stock: what kind of paper will be used, will it be glossy or matte, and will it be recycled?

Printer: who will print the piece, and will a union shop be used?

Ink: flat or metallic?

2. **Design the layout** of the piece. All told, determining what the finished piece is going to look like can take from three hours to three days.

3. **Assemble the photographs** and add them to the piece. At this point the copy goes to the campaign to be proofread for accuracy. The campaign manager is usually a better judge of a piece than the candidate. This is not to suggest that the candidate be kept out of the loop. The candidate should have an opportunity to view a piece at least twice in the development process, but after a final review, the campaign manager should be the one sign off on the piece.

4. **Prepress and printing.** Once the layout is finalized, negatives are produced and sent to the printer. Printing, cutting and folding can take from one day to a week or more depending on the complexity of the brochure and how many are printed.

5. **Labeling and sorting.** When the brochures have been printed, they go either to a mail house for labeling and sorting, which will take at least a day, or they go to the campaign for volunteers to label and sort, which could extend the process by days.

6. **Delivery.** Once the piece is labeled, sorted, and bagged, it is delivered to the post office. It can then take up to three or four days for a bulk-rate piece to be delivered.

The time between developing a concept and getting the finished piece in the voters' hands averages two and a half weeks.

Costs

Good direct mail can cost anywhere from \$0.25 to more than \$1.00 per piece depending on the complexity of the design and the number of pieces you print. Of course you can produce direct mail that comes straight off your local copy machine for 6 cents to 10 cents per piece, but remember that you get what you pay for. With direct mail, your goal is to put something in front of the voter that she will actually read.

Ask your direct-mail consultant for ways to cut costs. Many direct-mail houses will give you a break on costs if you schedule your work in advance. They can also give you design clues that can save money.

Many campaigns will ask a direct-mail house or graphic artist to help devise the voter contact plan, which gives the candidate the ability to see where each piece will fit in the overall plan and how efficiencies can be incorporated into producing the whole package. If you are coordinating the printing of any piece, always get at least three quotes on how much the printing will cost.

Direct Mail: What Can Go Wrong

- **Overload:** You put too much information into the piece.
- **Long turnaround:** The production takes longer than you anticipated.
- **Too much process:** The effectiveness of a brochure decreases in direct proportion to the increase in the number of people involved in reviewing it.
- **Overzealous candidate:** Candidates who write their own brochures tend to write for themselves rather than for their targeted audience.
- **Printing errors:** Anything can go wrong in the printing process, from wrong or faded colors to brochures printed with one side upside down.
- **Omissions:** Forgetting to include on the piece the bulk-rate permit number, or political disclaimer. Either of these can send a campaign into apoplexy.
- **Rush charges:** Lack of pre-planning adds rush charges, which can double your costs.
- **Wrong target:** The piece is mailed to the wrong voters.
- **Bad timing:** The piece goes out late.
- **Mixed or no message:** There's no central message or there are too many messages. Keep it simple and to the point.
- **Poor graphics or photography:** Sloppy graphics or bad photos make for a brochure that is likely to go straight from mailbox to recycling bin. On the other hand, eye-catching

graphics and professional photos significantly increase the chances that the piece will be read.

- **Boring:** The final travesty is to put all this time, effort and money into producing a piece that is boring.

Newspapers

If you can't afford broadcast ads, raise your visibility through newspaper ads. Although it is not an emotional medium, it does get your name out to far more voters than you will be able to reach through your direct mail strategies.

A problem that hinders the effectiveness of newspaper advertising, however, is the low readership that many daily newspapers have. Only in well-educated voter populations will newspaper ads reach the number of voters you need to win an election. And, among those who do read the paper, politics is hardly their first passion. Most people are looking for standard features such as sports and business.

Newspaper ads work when they reinforce other mediums that are carrying your message. If you have yard signs all over town and a direct mail piece out to your targeted voters, a newspaper ad will tie all the pieces together and give the voters a secure sense about your campaign and candidacy.

The strength of newspapers is that they allow for an explanation of complex issues. Readers can take the time to read the copy and thoroughly understand more than a superficial slogan. Also, some of the most effective uses of newspaper ads are in low visibility races where you will need to build name recognition. Endorsement ads, which list hundreds of names of those who are supporting you, can give you instant credibility and produce a feel of momentum. These ads only work when you have some very important, well-known people on your list as well as lots of people in general. While not persuasive or substantive, these ads do get read as people (particularly political people) will comb them for friends.

Newspaper ads can be effective in attacking your opponent's background or voting record. because newspapers are an intellectual medium as opposed to an emotional medium, there is less danger of an emotional backlash after a negative attack. Also, newspaper ads allow for a graphic depiction of your record and your opponent's record. Both the negative ads and the comparison ads take some amount of explanation, far more than a 30-second radio or TV ad could handle.

You can effectively use newspaper ads to show momentum by advertising the dates and places of your upcoming events, fundraisers and rallies. Although newspaper ads are not enough to provoke many people to attend an event, they do remind and reinforce an undecided supporter to get involved. Also, event ads can be used to build publicity for media events, such as public debates. If your candidate will be among many debating on TV or in front of the Chamber of Commerce, you might want to feature a flattering picture of the candidate and the time and place of the joint appearance. This will tell the voters that you are confident that your candidate will do well in that event.

Sometimes newspaper advertising can be useful in developing a campaign theme. By using a series of ads which have the same graphic layout (continuity helps to reduce confusion and builds name recognition), the campaign can present issues which constitute variations on your central theme. Don't try for more than one major idea in any one newspaper ad.

Production And Costs

Your newspaper ad is no place to write your entire issues platform. Nor is it a place to rewrite your entire resume. The newspaper ad can effectively handle more words than broadcast ads, but within reason. You don't want to lose your audience by overwhelming them with too many words and ideas.

The best ads are simple, with one idea in large headlines. You want a minimum of copy and a maximum of creative design. Don't design your ads by a committee consensus. To insure the

kind of visual quality that won't get lost between the tire ads and legal notices, get professional advice and have a graphic artist do the layout.

Newspaper ads must be large enough to attract attention. You cannot get your point across in a two-inch by four-inch ad on page 25 of your Sunday newspaper. Anything smaller than a quarter page ad is usually lost and not your highest and best use of campaign money.

Newspaper ads are also subject to discount rates if you commit to a newspaper contract for a specific number of ads. If you run more than two or three ads, chances are you will already have fulfilled the inch requirement for a small contract. Also, newspapers offer special supplements for important events, such as fall football schedules and the fall school schedule with its new school bus routes listing. Often special rates will apply that will allow you to get a better discount package. As is the case with all of the political campaigning vendor shopping you do, act like an efficient small business and make cost effective decisions accordingly.

Even in small cities, the cost of an entire full-page ad is \$1,000. In larger cities, ads may run over \$5,000 each. If your budget is less than \$25,000, a full page ad is too much money to spend on something that may have little persuasive value, and be overlooked by all but a small portion of the voters.

In summary, before you decide to invest your campaign's hard-earned dollars in newspaper ads,

- Make sure your investment is cost effective.
- Insure it will hit your target audience.
- Make sure that you can afford to buy enough of an ad placement to make it worth your while.
- Insure that it is the best use of your resources.

Billboards

They're big, they cloud the landscape, they're expensive and they're not going to persuade many voters to vote for you. But in many campaigns, particularly low budget ones, they can play a significant role.

When it comes to name recognition, billboards can really build momentum and increase your name recognition. A few well-placed ads will give both the candidate and the office she is seeking an early boost. If the candidate is not well known, some outdoor billboards will be needed. Depending on your financial resources, you may need to make some compromises. Instead of paying to locate large billboards on the expressway going through town, you may have to settle for some large handmade ones that your trusted volunteers can construct and place in key locations around town.

When Billboards Work

The large signs will catch a voter's attention only for a few seconds, making most of its impact a subconscious one. To maximize its impact, the sign needs to contain the name of the candidate, the office being sought and perhaps a three-word slogan. Omit the clutter of cute pictures and a sentence. The bigger and brighter the sign, the better the chances it will be seen, logged in a voter's memory and remembered as Election Day nears. The same principles apply for your Website.

Billboards are best used to support other campaign strategies. If you have a direct mail program planned, a strong door-to-door canvass or lots of phone banks, the billboard can help reinforce the voter contact which was more personal.

No matter where you choose to place your billboard message and how you intend to construct them, make them short, clear and simple.

Targeting your voters with billboards can be done easily. Take a look at the targeted precincts where you have concentrated voters and find key locations in those neighborhoods.

Billboard Rates

The cost of outdoor advertising is determined by the size of the audience. In most areas, the billboards are purchased through a contract with an advertising agency that can construct as well as place the billboards. If your targeted audience includes the people who live in one neighborhood, but the billboard location is on the expressway where thousands pass by each day, then you will be paying for both your targeted audience as well as those traveling by on the freeway. Billboards can cost as little as \$150 a month for a good neighborhood location to several thousands of dollars for prime urban locations.

The number of billboards bought in a single market is based on a showing of how many people are likely to see it in the course of a month. If you purchase a 100 showing, that would mean that 100 percent of the voting population would see at least one of the billboards within the month. It is possible to buy boards that will guarantee that 50 percent of the market or even 10 percent of the market.

Make sure you inquire about the cost of the construction of the billboards before you agree to locate them around your district. Large outdoor advertising boards are approximately 9 by 20 feet. There are also smaller billboards which are 5 by 10 feet, and quite adequate for most areas.

Corner Signs

For those locations where there are no billboards but there are great corners or sides of buildings, you might want to consider large signs. Traditionally 4 x 4 feet or 4 x 8 feet, these signs can be silk-screened onto plywood signs that may cost \$10 to \$25 a piece. If you decide upon a volunteer effort, make sure you have a strong carpentry team or people who have done silk-screening in the past.

Get durable, sturdy wood that will be able to withstand the seasonal rains, wind and early snowstorms. These signs are great on private property throughout the district. Look for those buildings with large walls that have been used in the past for public signage. Check with your local election officials to see if there are any regulations restricting the size of your signs or their locations.

Shy away from vacant buildings and old barns as they give a somewhat dilapidated impression not only of the building but the campaign as well.

Yard Signs

Yard signs provide a very valuable asset for your growing name recognition. They can be giant-sized endorsements from an individual business, a family or a property owner.

Yard sign wars persist in every campaign. In many municipalities there are restrictions regarding when and where these signs may be placed. For example, the signs are not to be placed in legal rights-of-way. In other jurisdictions, the yard signs can be put up only 90 days before the primary. Whatever the rules, know them before you plan your yard sign strategy.

The placement of yard signs can help you build a strong field organization. By asking residents to place the signs in their windows or in their front yards, the campaign knows where its favorable voters are located. If there is no sign, there may be an undecided voter: a challenge for your door-to-door canvassers to place a new yard sign.

Location and the strategy behind yard signs prompts discussion and argument in every campaign. A general rule of thumb is: the lower the visibility of the entire campaign, the more you will need yard signs. On the one hand, yard sign projects can take up more time and energy than may be cost-productive for your campaign. On the other, if you put a good yard sign effort together you can appear to be the grassroots heroine of town. Again, remember, that whatever you choose to do in the campaign, you must do well.

How To Win The Yard Sign Wars

Get a yard sign design that is simple, bright and bold. If billboards have room for very little information, then the yard sign has even less room: only enough space for your name and office

for which you are running. Voters who see these signs will not be looking for cute pictures and catchy phrases. As far as size is concerned, you need to be able to read the name of the candidate from a block away.

Design and Construction

If you are living in a windy climate, you may need a strong plastic foam-core yard sign. For most campaigns, a strong paper cardboard yard sign (called rainy-day board) will work. You will want to staple two signs together front-to-back so that voters can see the sign from both sides.

Yard signs need to be constructed to last for the duration of the campaign. There are many opinions regarding how you put up a yard sign. The best advice is to get a strong staple gun (table staplers will not work) to hold the signs to your stakes. The stakes should be at least 1½ x 2½ and preferably rough cut. The cross members should be about 1½ shorter than the width of your sign. The standard T-design is used where one stake is secured perpendicular to the other.

There are two ways most campaigns instruct their volunteers to put up signs:

1. Take your T-design stakes to the location where you are going to put the sign. Use a short handled sledgehammer and a shortened stake to pound a hole in the ground where you will place the sign. Take the shortened stake out then pound in your foundation stake post. Take two yard signs stapled back-to-back with a wood-backed stake in the middle of them. Slip the signs with the wood-backed piece over the central grounded stakes. Take your staple gun and staple the signs with the wood backing along the center of the sign. By assembling the signs this way, you eliminate weakening the staples and signs when you pound the entire sign into the ground.
2. Construct the T-design stake base. Staple one sign on the front of the stake and then re-staple another on the back so that you have double the number of staples on one stake and each side is separately attached to the same stake. It is still best to have a wood-backed piece along the top of your signs. Construction of yard signs and stakes should take place in one central location. It is good to have only one or two people in charge of construction as there is a constant need for quality control.

Location

Before you place the yard signs in any location, you will want to strategize ways to increase the impact of your yard sign visibility campaign. It is far more effective to place dozens of yard signs up overnight in one area of town than it is to place the same number throughout town over a two-week period of time. Determine where your targeted voters are heavily located and have your canvassers walk door-to-door to find new yard sign locations as well as to solicit for voter support.

Get dozens of locations in one small area and arrange a one-day yard sign blitz where you put up signs all over the targeted area. The impact on your voters in these cases will be much more significant than just letting the signs go up one at a time, wherever and whenever supporters put them.

Repair

Although most campaigns are usually convinced that their opposition runs all over town taking down its yard signs, it is more likely that non-political, small time vandals are the ones removing the signs. The wind and weather is typically the second most prevalent destroyer of campaign yard signs.

You will need to have very conscientious workers committed to driving around town, replacing and repairing your yard signs. It is important to monitor your yard sign locations as soon as the signs go up, because a broken sign signals two negatives to your voters:

Your candidacy is not worthy of support so people are attacking the signs.

Your campaign is not organized enough to get the signs repaired immediately.

Summary

All printed, broadcast and other materials for the campaign require continuity, repetition and high quality of production. The content must have good taste and reflect the targeting you have done: material must be tailor-made to attract the voters you must persuade to go to the polls. If your media fails, its failure will be due to:

- Your failure to define your target audience and its attitudes
- Your message was poorly crafted and hard to understand
- The medium you chose was wrong: either you could not afford enough of it to be the dominant candidate with that medium, or you could not reach your voters through the medium you chose
- The production or printing was unprofessional
- You tried to do too much and had too many confusing messages
- You were unable to distinguish yourself from your opponent
- You could not give the voters one message to remember

Most of the time, media which falls short of its goals leaves the candidate behind on election night. Post-mortem reviews on good campaigns that lost reveal media shortcomings started with people who thought they could handle media decisions and production, but were inexperienced. They did not know how the media production worked and would not take the time to learn. Too much money is invested in television, radio, newspapers and printed material for the campaign to depend on a volunteer who is not able to compete with the professionals handling these same decisions for your competition. The smart candidate will pay a professional to advise her, even if she can't afford to pay the same professional to do the actual work.

As with all parts of the campaign, shop around for the best advice for the best price. Because political advertising is different from product advertising, you should find an adviser who has a blend of both political and media expertise.

When making your advertising decisions and determining how much of your campaign will be allocated to print and broadcast media, there are a few suggestions to remember.

- Look throughout your list of supporters to find the public relations and advertising professionals you can get to help. Get proposals and bids for all production and printing costs before you decide upon a single vendor.
- After the bids are in, ask the three best if they will consider a lower bid or if they will throw in extra services for an exclusive contract.
- Make sure you have a union printer and don't forget to put the union "bug" on the printed material.
- Print your material on recycled paper and don't forget to put "Printed on 100 percent recycled paper" at the bottom of the material.
- Make sure the candidate and campaign manager have the final approval for all the broadcast and printed mass media and insure that the candidate understands where in the process she has her final approval.

Your media and mass-produced materials that hit your target audience will contribute more to the success or failure of your campaign than all the fieldwork you can muster.

Although you can reach many voters through personal contact, no effort will be as important as your broadcast and print media decisions. Once made, these decisions will commit you to a strategy that will be your best shot at the winner's circle. Choose well.

Chapter 14

Field Operations

Field operations is the term that defines getting out of your office and meeting the voters one on one. The goal of your campaign is to win and to accomplish this you must raise your name recognition and campaign visibility, as well as build a message contrasting your views and positions against those of your opponent.

A crucial element to any campaign is building and sustaining the momentum that relies on energy, money, press and people to spread the word and the good feelings that come from a well-organized populist campaign. A strong field operation depends on finding volunteers, putting them to work quickly on meaningful tasks, and keeping them happy. Volunteers give you the power to get your message out and they are the ones who lend a personal touch to your campaign since they out in the field interacting with voters. Remember, a strong campaign can be the best magnet to attract new volunteers.

A good field organization starts with strategic planning which means planning to spend your time, money and resources on your targeted voters. Once you have identified those voters who, due to past voter history, may be your supporters, the next step is to figure out the best ways to reach them. The key components of a winning field organization include:

- Finding the right field coordinator
- Designing a field plan
- Developing your field/volunteer budget
- Doorbelling
- Distributing Literature
- Identifying Voters
- Phone banking
- Creating absentee ballot strategies
- Conducting voter registration drives
- Rallying around Election Day Get-Out-The-Vote (GOTV) efforts

The Field Coordinator

Field organization involves translating campaign strategies into specific work projects that lead to votes, money and visibility. A good field coordinator helps devise the actual targeting of priority precincts. She knows where the target audience lives and what issues they want to hear about. If your message is not getting to the right targeted audience, the field coordinator is on the spot to suggest a midcourse correction. She also knows the geographic lay of the district, the key players who make political endorsements and which groups follow up their support with fundraising help or voter contact connections. The field coordinator settles personality conflicts within districts and precincts where power battles ensue. At the campaign headquarters she represents the views of her local field committees. She walks the fine line of carrying out orders from headquarters while allowing as much local control of activities as possible. She knows her best volunteers by name and uses every opportunity to recruit new ones.

Although it is more important for field coordinators to have experience in handling all the responsibilities that come with the field job, it is a big plus if the field coordinator comes from the geographic area and knows the political lay-of-the-land. For instance, if there is a particular special interest group that customarily provides phone banks for the Get-Out-The-Vote (GOTV) effort at the close of the campaign, it is helpful for the field coordinator to know whom to ask and to ask far earlier than other campaigns which also may be competing for the same resources.

The field coordinator must be good with people; her primary expertise should be finding resources and people for little to no money and getting them to work to deliver voters in the swing precincts. She should be a good judge of character and be able to spot an organizer whom she can depend upon after only a few minutes' conversation. She must love people and like talking politics with everyone from the local barber to the hometown political boss.

A field coordinator also becomes the candidate and campaign manager's eyes and ears in those parts of the district where the two may not visit often. Her feedback on press, campaign message, project direction and goals will continue to be the most important feedback for campaign changes.

Designing A Field Plan

Devising the field plan requires taking a close and intensive look at the targeting districts. You need to determine:

What kind of people resources will be required to reach all the voters in your targeted audience (a volunteer budget)?

How often do you intend to reach them with a persuadable, repetitive message?

Which campaign techniques have been effective in the past in reaching your targeted voters?

What timetable is reasonable to accomplish all the above?

Will you attempt to register new voters who fit your persuadable supporters' profile?

What kind of absentee ballot program you will have?

What plans, people and budget priorities will you devote to getting your identified supporters to the polls on Election Day?

After defining your targeted audience, you should know how many voters you need to reach, where they live, what their demographic profile looks like and to what messages they are likely to respond. Break those targets down into reasonable field districts: geographic groupings which make sense based upon local activities, customs, past voting history or local Steering Committee leadership.

Once developed into manageable areas, find local leadership that can serve as a springboard for projects, candidate visibility and networks of support. Most partisan campaigns will rely upon precinct organization: for example the Democratic and Republican precinct committee officers (PCOs) who have run field campaigns in the area previously. PCOs can be your best and most loyal supporters, however, keep in mind that the majority of PCOs are inactive. Find the active ones and get their advice and input. Your campaign will probably want to couple several precincts into one area for purposes of management. In larger races, the areas sometimes involve an entire city or town.

Designing a Voter Contact Plan

After the campaign strategy has been devised and you are aware of the key areas where you need to raise campaign visibility, set your local Steering Committees to work on the voter contact plan. There will be much for the Steering Committee to do:

- **Planning necessary mailings** for local events, fundraisers, and home coffee hours
- **Planning follow-up phone banks** for event mailings to remind invited guests to attend fundraisers
- **Organizing phone banks to identify voters** in your targeted precincts
- **Follow-up the phone banks with letters** to undecided voters to convince them to support you. Follow-up the letters or phone calls to supporters to ask them for contributions or volunteer time
- **Organizing door-to-door canvassing** to identify key supporters, undecided voters and non-supporters. Once determined it is helpful to put this information in a campaign

database where all the voters are clearly identified. This will help you determine the strength of your follow-up

- **Developing local press events** (always in concert with the press secretary to insure message continuity and appropriate strategy) to attract attention to the campaign as well as your speaking engagements
- **Coordinating an absentee ballot plan** where appropriate to get as many of your supporters as possible to vote by mail if they cannot make it to the polls on Election Day (traditionally this is coordinated with the door-to-door canvassing program and phone banks... once a supporter is identified, a campaign worker is sent to her home with an absentee ballot application which is already filled out and that the supporter need only sign in order to be sent an absentee ballot).
- **Creating other campaign projects** which coordinate with the overall campaign strategy and priorities

Each area field plan will be different, but each should coordinate with the overall field plan. Some areas will start door-to-door work sooner than others and some areas will never get a phonebank working to the capacity required to reach all the targeted voters in that area. A local Steering Committee or field team will have to be realistic about the actual work product that can be expected from each area.

Developing A Field And Volunteer Budget

Field budgets are built into the overall campaign budget. The best advice is to get your field team to understand the entire campaign plan, the important targeted areas and the budget priorities. When more of the campaign organization works on fundraising, you will have fewer problems determining how money will be spent.

Budget Expenses

Controlling expenses is difficult when a district may stretch for miles. However, a specific budget request form needs to be filled out and approved before anyone commits a cent from the campaign for supplies, services or goods. Make sure that anyone entrusted with a campaign responsibility understands the financial aspect of the operation and the strict restrictions upon spending campaign funds. A campaign which delegates too much of the spending authority is a campaign that will go broke!

In most cases, field leaders who are authorized to make financial commitments will first turn in a budget request which will outline the amount of the check required to pay for a necessary field expenditure. Valid field expenses usually include phone calls, mileage, supplies, stationary, brochures, flyers, invitations and other necessities. Major expenses are planned and budgeted in advance. Minor expenses, approved in advance, are usually reimbursed by the treasurer after receiving an invoice or the receipts of items paid for by either cash or check.

All of those flyers, door-to-door drop pieces, envelopes, maps, pencils, name tags, refreshments, and other odds and ends you need to efficiently coordinate the field operation must be reflected in the budget. The goal with all the field operations, since they rely heavily upon large numbers of supplies, is to simplify the materials you will need. The flyers should be simple and not have to rely upon fancy graphics that you can't get out of the campaign computer and printer. As you develop stationary, logos and other campaign trademarks, think of how each can be reproduced simply with as little expense to the campaign as possible but still look professional.

Volunteer Budget

Just as you need a budget to plan for and monitor cash expenditures, you should have a volunteer budget to plan for the number of volunteers you will need to handle the major field operations. There are standard numbers of people you can reach by phone per hour as well as standard numbers of homes you can reach per hour for purposes of voter identification.

For example, your field plan says that you need to reach five thousand voters in twelve targeted precincts in order to identify their voter preference. The first thing you will want to do is put together a realistic assessment of how many volunteers you will need to accomplish this goal. Let's say doorbellers can reach an average of twenty-five homes per hour, you can then figure it will take you a total of two hundred hours to reach all your targeted voters. If one volunteer can work five hours going door-to-door without losing important momentum (not counting the hour of training and door-to-door kit assembly), then it will take forty volunteers working five hours each to accomplish your goal. If you have just twenty volunteers, then it will take you twice as long to get the canvassing completed.

On the other hand, if you're phoning these targeted voters and you have a long phone bank voter identification script, you may only be able to make a dozen completed calls per hour. To reach the same five thousand voters, you'll need to have 416 hours of calling. Assuming a phone bank shift is three hours long, then you will need 138 shifts. If you have five phones that you can use five days a week you'll be able to schedule twenty-five shifts a week. At this rate, it will take a little more than six weeks to finish the voter identification.

You must calculate a volunteer budget for every major activity of the campaign. The success of most field operations has little to do with major issue debates; rather it is almost exclusively dependent upon the planning and implementation of your phone banks, doorbelling, direct mail plans, and candidate visibility activities.

Technology And The Field

Technology will make your fieldwork better organized and more successful. You will reach more voters because you have an organized database. Moreover, you will know who your voters are and how successful your campaign is with your target. Your Campaign Manager and Field Coordinator need to be well versed in basic technology programs included in MS Office.

For all voter contact (doorbelling, phone banking etc.), voter information **MUST** be marked and identified, or "tagged". This information **MUST** go into a simple database for future reference. MS Excel is a great program for this simple database. The key to utilizing these technological resources is organization. Do not allow your campaign to become slow at entering information into your Voter Contact database. This information should never be more than three days old. These days, doorbellers can enter information directly into a Personal Digital Assistant (PDA) or a hand-held wireless Blackberry, thereby eliminating an additional step.

For doorbelling, technology is also key in many ways. For obtaining lists of your target, many state parties have 'voter files' which is a large database of all of the registered voters in your state. Voters are identified as to their party affiliation. You can also get other great information from your state voter file, including: age, sex, address, phone number, absentee or poll voter, and how they voted in the past. These lists are usually either cheap or free (an in-kind donation), however, they are usually not updated since they rely on the information people supply when registering to vote. How many people do you know who update their registration information when they move? Exactly. You can go to a private vendor who will provide you with updated, organized lists for a lot more money and accuracy.

Printing out maps is also crucial for campaigns. Do not waste time sending people to doorbell in extremely hilly precincts. If you must, at least provide them with a topographical map. One resource of many is MS MapPoint which costs roughly \$250, but it is worth the cost and your volunteers will love you for it.

Using technology will make a potentially messy field campaign organized and far more successful at reaching your target. Every aspect of your field campaign should include technology.

Doorbelling

The one form of campaigning that is as old as the ballot box itself is the foot power of going from one home to the next, delivering either a printed message or a short explanation of your message. Talking to voters yourself is an inexpensive, convincing way to build momentum for

the campaign. It is also the most direct way to let the voters see for themselves what kind of person is running for office.

Word of the candidate being in a specific neighborhood spreads like wildfire: you may only go to a smattering of houses, but the impact is felt miles away. It is often said that for every person a candidate meets and talks to, there are 10 other people who will be influenced by that one contact: family, friends, business associates, other social acquaintances, even the local grocer may be favorably influenced by the news that a real candidate was in the neighborhood.

Door-to-door campaigning also lends you credibility: it makes you appear real as opposed to a distant image created by a media manager. It also allows you to be seen as a sincere person who cares about and listens to what others have to say. It is humbling not only for yourself but for the entire election process which is often seen as a power-hungry and ego-gratifying game.

Although most newcomers to the field campaigning world prefer to go to every house on the block, experienced campaigners know it is much more efficient and less costly to figure out the smallest, most important target population to be reached. You do not want to go to every home in a district since about half the eligible voters actually are registered to vote and only half of those vote in most elections.

Always remember, stick to your targeted voters and take note of all of their information, most importantly if they are voting for you! Doorbelling has a strategic interest other than good old grass root politics; it seeks to identify your voters. Doorbelling is next to useless unless you have identified individuals in your targeted area as a supporter or an opponent. Oftentimes, it is good to devise a voter identification or code for volunteers to follow and write down on their lists. All doorbellers (including the candidate herself) should know and use this code. Here is an example:

Common Voter Identification Tags:

++:	Strong supporter
+:	Weak supporter
-:	Weak opponent
--:	Strong opponent
NR:	No response
NV:	Not voting
AV:	Already voted

Doorbelling Supplies

The walking lists. After you have pulled together your target of likely voters (those most likely to be persuaded by a crafted, repetitive message), you need to order your walking lists... a computer list of the names and addresses of frequent voters arranged by street and household order. In many campaigns, you can also generate your own targeted voter list with a software program designed to help you. Try to use updated walking lists, even though last years' candidates may offer you their old tattered ones. Old lists will not have the recently registered voters nor will they have those who have been dropped from the list due to voter inactivity.

The precinct maps. Get maps from either your county auditor, state party, local political club or a private vendor. There are also many computer programs that have very detailed topographical maps for those hilly areas. In many areas, a taxicab guide usually exists which will outline where all the houses on the block are located. The Polk City Directories, the nations leading city directory publisher, also lists voters by street address. Other candidates who have run in your area may have good precinct maps which they have copied and have in their files. Borrow them and make a copy of your own.

Proper identification. Volunteers and even candidates are often asked for identification: after all, you are trying to get in the door of a home where you were not invited. The best way to minimize people questioning your appearance or motive is to wear some visible campaign identification: T-Shirt, campaign button, campaign cap or other visible paraphernalia. In

addition, you should carry personal ID (a driver's license or voter registration card will do). Also, have the name of a campaign staff person you can reach while you are in the field going door-to-door. In the event you run into a problem or even a question you can't answer, it is important to have the name and number of someone you can reach right then. If you can, take a supporter from the neighborhood with you.

Lists and supplies. You should always carry a list of your voters so you can identify them! The Field Coordinator should have lists printed either from the state or local party database or a private vendor that includes only your targeted voter universe, for example people who have voted in three or four of the last four elections held by absentee ballot or 3/4 and 4/4, absentee voters. You will also need pens or pencils and a clip board to record notes, scratch paper and an envelope or bag to keep all the above from getting lost, wet or blown away. Additionally, carry some campaign material to leave for the voter and a return addressed remit envelope just in case you find a fundraising opportunity.

Official voting information. The name and location of the polling place in the targeted area is important to have in hand so that you can tell voters where they vote, especially in the event the location has been changed or the voter hasn't voted in a long time. Also, if you find someone who appears to be a supporter, but is not registered to vote, you will want to register that voter or tell them where they can register nearby. Lastly, absentee ballot application forms should be included in your kit of doorbelling materials so you can give them to supporters.

Doorbelling Techniques

The basic kinds of doorbelling techniques include: canvassing (voter identification), personal contact by the candidate, distributing by hand campaign material directly to the voters and simple literature drops.

Canvassing (voter identification) involves going to specific voters with questions about their voting preferences. Armed with your list of targeted voters, you want to establish contact with them and ask if they have determined whom they will be voting for in the upcoming election. If they are undecided, you either want to persuade them that you are the best choice or at least leave them with favorable impression. If they are truly undecided, you will want to follow up the contact with a letter, additional direct mail information and/or a phone call. At this point when a targeted voter becomes a supporter, you will want to record this information so you can remind that voter to vote on Election Day.

Personal contacts and distribution of campaign material. If you are not going to attempt to record information about supporters and undecided voters, you should at least establish personal contact with your targeted audience. Knock on the door, smile, say hello and explain you are going door-to-door to acquaint voters with yourself. Ask if they would look over the campaign brochure and consider supporting you.

Literature Drops. To increase name identification and campaign visibility, you might want to consider a simple literature drop. Again, take your targeted voters' list, and head door-to-door with a stack of brochures, leaving one at every front door. Make sure you affix the brochure to the door knob, leave the literature inside the front door or tuck it under a planter or welcome mat so it doesn't blow away.

Instructions for Doorbellers

Doorbellers should be given specific instructions regarding how their work fits into the general strategy of the campaign. They need to know how important it is to find supporters and that every undecided voter is more likely to consider the candidate once a volunteer has asked them to do so.

Train your volunteers well. At a central meeting or rally, walk them through the instructions and doorbelling packet. Whatever form of doorbelling you determine will work, make sure everyone understands the campaign objective and game plan.

Dress for the neighborhood. If the neighborhood is a blue-collar community, don't show up with a white shirt and tie. If you're in a senior citizen district, you might want to leave the jeans and T-shirts at home and present a dressier appearance. Even if you do dress well, but casual, make sure you have strong walking shoes as you won't want to cut your goals short due to blisters or tired feet.

Don't walk on the grass or otherwise upset the people you are visiting. Pick up stray pieces of litter as the neighbors might see you and think more highly of your candidate.

If you see a sign which says, "Beware of Dog", believe it. If you hear a big dog, avoid the house. (Most dogs start barking before you step a foot on the property.) Some canvassers believe you can talk to a dog and decrease the chances of being bitten. Others subscribe to ignoring the dog. Although some seasoned canvassers maintain it is good to take along a can of spray mace or spray lemon juice (which is a natural deterrent to a dog if sprayed onto their nose or eyes), general advice is not to aggravate any situation. Just get out of the way of troublesome animals.

Don't doorbell late at night. When the sun goes down, you should be wrapping up the day's canvass and heading home. The best times to doorbell are late Saturday morning and afternoon, Sunday afternoon and from 6pm to 9pm on week nights except Friday. Even though the rain may dampen your spirits, it actually endears you to voters. After all, if you feel so strongly about a candidate that you would work in the pouring rain the candidate must be terrific.

Don't make up answers to questions about your candidate. Your job is to leave the voter with a good impression of the candidate, not an entire platform. If there are questions to which the campaign can respond, or if there is other campaign literature that would help the voter decide to vote for your candidate, make a note to send it on either the tally sheet or scrap paper and make sure the request is followed up.

Be courteous and friendly, but don't get into long debates with people. Most people who would want you to stay and talk with them might just be lonely for conversation rather than interested in the candidate.

Do not leave campaign material in the mail box as it is against federal postal regulations. Also, be careful not to leave material in the wrong boxes: sometimes people have boxes that look like message or newspaper containers but the box may indeed be a decorative fixture on the house and never used.

Doorbell with a partner and always stay within sight of each other. Usually one person takes one side of the street while the other takes the other side. Do not take any chances of putting yourself in personal jeopardy by going into the home of someone who acts suspiciously. You want to remain outside the door, unless it is raining. If someone invites you in for a cup of coffee or a soft drink, trust your instincts. Usually a home filled with children is a safe bet. These are the homes you might want to politely ask if you can use the phone or take a quick bathroom break.

If there is no one home at a targeted home, leave a brochure with a little note saying, "Sorry I missed you; please consider my candidacy." Have lots of these brochures filled out before you start doorbelling: it will save valuable time.

Return all materials, literature and lists to the campaign headquarters the same day you finish your assignment. Even if you fall short of your goals, bring what remains back to the headquarters and clearly mark those voters whom you did not get to canvass. Campaigns are famous for doorbellers with good intentions but piles of unmarked walking lists stacked in their basement.

Candidate Doorbelling

Certainly the most effective doorbelling is done by the candidate herself. The element of surprise in seeing an actual candidate at one's front door remains in a voter's mind and is very convincing when Election Day rolls around. The lower the campaign budget, the more important the door-to-door efforts of the candidate should be. Several days a week should be dedicated to candidate doorbelling. The candidate should be dispatched to those precincts which are

considered crucial swing precincts: where there is a large turnout but the voters don't always cast winning numbers for your party. You want to swing them over to your side.

The candidate should look strong and energetic, wearing clothes that are casual but professional. Flat heels and even jogging shoes are acceptable if there is a lot of walking to do.

People feel more inclined to talk with a candidate as opposed to a volunteer, so plan for the candidate to be able to reach fewer houses per day. Voters frequently ask more questions and begin explaining more of their own constituency complaints and problems to the candidate.

In addition to handing out literature and meeting voters directly, candidate doorbelling should also be asking for permission, either now or in the future, to post yard signs along key arterials. The candidate should have a form for recording where the signs will be located and where the voter will want the sign to be placed.

The candidate should be accompanied by another campaigner to move her along the street and keep the details of who needs a yard sign. Family members are great companions for candidates and give a healthy message that the family is behind the candidacy. Family members can also be great doorbelling partners with the other volunteers who are in the field. Volunteers often feel more inspired when the candidate's family members are out there working alongside them.

Phone Banks

One of the most efficient voter contact techniques is the phone bank: a collection of telephones located in one location usually dedicated to identifying those voters supportive of your candidate.

Your goal is to reach all of your targeted voters by canvassers or by phone identification. For a successful phone bank operation you will need to build a volunteer force that can staff all your phones in an ongoing manner. Traditionally, doorbelling efforts are centered on two or three weekends for most of the volunteers, or three days a week for the candidate doorbelling in low-budget campaigns. But, phone banks, in medium to large campaigns, can be a ninety day proposition.

Voter Identification/Issue Preference

In most cases, you don't want to start phone banks until the voters have begun to realize that there is a campaign underway. Three months from the primary is usually a good time to begin voter identification phone banks. It is important to find central locations where there are five or more phone lines available. Traditionally, campaigns look for law offices, insurance offices, local labor headquarters, political party offices, travel agencies or campaign offices which have previously been set up with special lines for phone banks. The campaign needs to prepare a letter or memo of understanding with the host which outlines the conditions and agreements for using the office for phone banking (usually a three paragraph note). You will want to establish the days, dates, times and who the responsible party will be. The campaign phone bank supervisor will be responsible for getting a key to the building. You want to formalize this relationship for two reasons:

1. **You want to secure the best phone banks** for your campaign and be protected against those other campaigns that will want to use the same office;
2. **You want to commit the office to a steady involvement** so that you won't have to find new locations each week.

Central locations which provide one single office from which many people will phone are important as you need one phone supervisor to watch for problem phoners or trends that may require some changes in the strategy. If volunteers are willing to work on the phone banks from home, have them work on looking up phone numbers as opposed to making actual calls. If you must use home phones for voter identification, make sure your supervisor trains the phoners well and actually checks on the progress of the calls being made. The biggest problem with home

phoners is that the calls seldom get made. In a group situation at one location, each phoner can be inspired to meet their goals by the other phoners. The comradery encourages people to work longer with less distractions.

The supervisor is also responsible for bringing all the materials, supplies, lists of targeted people to be phoned, targeting sheets to record the answers and required follow-up, food and soft drinks, as well as the campaign information. The phone supervisor should be well versed on the campaign issues and the candidate's platform in order to answer questions that may come up during the phoning.

With three hour phone bank shifts, it is not necessary to provide a meal; however, on week nights most phone banks will offer light refreshments (usually donated by other volunteers), coffee and soft drinks.

Each evening before a phone bank begins, the supervisor should have a short training meeting with the phoners for the evening. It is important to give these volunteers any bright, uplifting and insider news about the campaign; this helps to entice the volunteers back if they know what is going on. Also, it is important to review milestones the phone bank identification has reached so that volunteers can see real progress is being made. The training should then include a brief refresher of the written instructions of what needs to be done and how important information is to be recorded.

The phone bank supervisor needs to watch for those volunteers who are not well suited to making phone calls. Those who are difficult to understand; those who are too talkative or disruptive or those who simply don't follow the rules should be reassigned to other campaign functions. Each phone banker should get:

- **A recent brochure** and biography about the candidate
- **A list of the key people in the campaign** in case someone they should call should request further information
- **Instructions** concerning how the phone bank will be run
- **Lists of targeted voters** and their phone numbers
- **A tally sheet** for recording the results of each phone call
- **A list of the precinct polling locations**, in case a voter needs to know where to vote
- **A sign-up sheet** for the upcoming phone bank evenings

Sample Phone Bank Instructions

Thank you for joining the Judy Baker for State Senate phone banks. You are now part of a team of phone workers who are identifying more than five thousand supporters for Judy. Our goal is to find those voters who are supporting Judy and get them to contribute time and money to the campaign. Those who are undecided need to be sent a convincing letter from the candidate, and those that are supporting other candidates need to be dropped from our targeted lists.

Your help will move us closer to our target of identifying enough supporters to win on Election Day. All the voters you identify will be called back on Election Day and reminded to vote.

Please read these instructions thoroughly. The phone surveys have been pretested and it is imperative that you follow the script as closely as possible. Ask any questions now before you get underway. Again, thanks for your help.

1. **Read the attached script aloud** at least twice before you begin, and be familiar with the words so that you don't appear to be reading from a script.
2. **When you call a number from the phone list**, you will have several options to record the actual nature of the connection:

CC, Completed the call and asked all the questions

WN, Wrong number

AM, Answering machine—If you reach an answering machine, leave this message: “Hi, I’m calling from the Judy Baker Campaign, we were wondering if you had made a decision yet on whom you will be supporting in the upcoming election. We’re hoping you’ll consider Judy as your choice for City Council. We’ll call back later. Thanks.”

NC, Not completed which should include phone calls where there was no one home or no one who could complete the phone survey.

DC, Disconnected or otherwise out of service

IC, Incomplete call whereby the survey was cut short

RA, Refused to answer.

BS, Busy signal (attempt to call back after your next two calls are completed).

3. If a caller wishes to talk to you about specific issues, only talk about the answers you know, those which are covered in the brochure or those which the supervisor can answer. Do not guess when committing the candidate to a specific position.

4. Do not get into a long discussion with the person you call. Some people are anxious to get phone calls and tend to want to talk for long periods of time. Our goal is to identify hundreds of supporters tonight and to accomplish this, each phone call needs to be less than seven minutes long.

5. If you reach an angry or rude voter whom you cannot neutralize, try to end the conversation politely or hand the phone over to the supervisor. Never be rude or angry to anyone you are calling. Remember when you are part of our phonebanks, you personally represent Judy, so let’s put our best foot forward and not in our mouth. Remember to remove them from your call list for the next time.

6. Have the polling places of the people you are calling near at hand as many people forget where they vote, and in some cases, the location may actually have changed.

7. While you are campaigning for Judy, we would appreciate your limiting your conversation with voters to just her race. Please do not campaign for other candidates or issues unless asked to do so by Judy.

8. The hours for calling are 6:30 p.m. to 8:30 p.m. on weeknights; 11:00 a.m. to 6:00 p.m. on Saturdays and 5:00 to 7:00 p.m. on Sundays. Do not begin a new call after this time, but do get back and recall those people whose lines were busy, those who were not home, and those who indicated on their answering machine that they would be home later. Stop all phoning by 9 p.m.

9. Review the tally sheet and record the answers you received, making certain you have noted all the calls where follow-up is required.

Sample Script for Phone Banks

“Hello, my name is _____ and I’m calling on behalf of the Judy Baker for State Senate Campaign, is (name as listed on the call list) home?”

“Hi, _____ do you have a minute to answer a few questions? Good.”

“The State Senate race in the 36th district is one of the five big races in the state this year. Have you chosen whom you will be supporting at this time? If so, who?”

Charles Rolland _____ **Judy Baker** _____ **George Allen** _____

NOTE: Do not read names; just see whom each person names.

- **If voter chooses another candidate** say, “Okay, thank you for your time” and end the call.
- **If the voter identifies Judy Baker, go to Section A.**
- **If voter is undecided continue:**
 “If you haven’t chosen a candidate, let me read through the list of candidates who will be on the ballot.” **Now you list the names.**
 If the election were held tomorrow, who would you vote for?
NOTE: Rotate order each time you call a new voter.
Rolland _____ Baker _____ Allen _____
- **If voter selects Judy Baker continue to section A**
- **If voter is still undecided go to section B**
- **If voter selects another candidate conclude the call**

Section A

“That’s great that you’re supporting Judy. I’ll let her know. If you have extra time, we could really use your help in any number of volunteer assignments that are currently underway.”

- “Would you be available to work:” **during the evenings _____ weekends _____ weekdays _____**
- “Are there certain projects you would enjoy;”
Phone banks _____ going door-to-door _____ campaign events _____ mailings _____ putting up yard signs _____ data-entry/typing _____ working in the headquarters _____ fundraising _____ holding a coffee for Judy in my neighborhood _____

“As you’re probably aware, campaigns take a lot of work and a lot of money. Since Judy has stated she will abide by the spending limit, we are trying to attract as many individual donors as possible to offset the number of high donors that her opponents will attract. Would you be able to donate a small contribution to her campaign?”

If No,

“You’ve been very helpful and I’m very glad to meet another supporter like you who cares to get involved in her city. Thank you very much and someone from the campaign will be back in touch with you within the next four days. Thank you for your time. I’m happy to have gotten your phone number to call tonight. Good-bye.”

If Yes,

“That’s great. We have invested in a credit card machine which allows us to accept your contribution through use of your VISA or Mastercharge credit card. Can we count on you for a contribution? How much can we put you down as your contribution?”

\$50 _____ \$25 _____ \$10 _____ OTHER _____

“You can either send us a contribution, or I can take the credit card information now. Which would you prefer?” **NOTE:** Fill out the credit card form or note the amount to be asked for in the follow-up letter.

“You’ve been very helpful, and I’m very glad to meet another supporter like you who cares to get involved in her city. Thank you very much and someone from the campaign will be back in touch with you within the next four days. Thank you for your time. I’m happy to have gotten your phone number to call tonight. Good-bye.”

Lists, Lists, Lists

Both phone banking and doorbelling will lead to a lot of lists. As a Field Coordinator or Campaign Manager, you need to make sure your lists are organized. These lists are the bread and butter of your campaign - they are your voters! You need to have up-to-date and accurate information about every one of these supporters you have contacted for the GOTV phase of your campaign.

Lists should be organized into a Voter Contact Database (using Excel for example) as soon as the activity is completed. The Campaign Manager or Field Coordinator should find a reliable, tech-savvy volunteer (or group of volunteers) to update these lists. Make it organized and have the volunteer pick up the lists on a regular day each week. Monday is always good so that the information gathered over the weekend can be inputted right away. The database should include fields for: name, phone number, address, email address, date first contacted, whether they are a supporter or not (voter tag), absentee/poll voter, follow-up call or card, and GOTV contact.

After the data is entered, the lists can then go on to a phone bank for a follow-up call or to a volunteer to send a thank you email or post card. Your Voter Contact Database will also be the most useful campaign commodity during the GOTV phase.

Absentee Ballot: Vote By Mail

We’ve all seen it before. election night horror. You watch the returns throughout the long evening, only to see the numbers fall within hundreds of votes of one another. Tension mounts and you see the victory slipping away. The only thing that becomes clear is that there will be no declared winner on Election Night: the final decision will not be known until the absentee ballots have been counted.

Previously the only people who could vote by absentee ballot, or as they are now being called, the mail ballot, were people in hospitals who physically couldn’t make it to the polls, college students out of the state on Election Day or those voters who were out of town during the first week in November. Now the vote by mail trend has become a major new trend for today’s campaigns. With the increasing number of ballot items and initiatives on some state ballots, voters are finding it is easier to vote by mail.

The Rules

Every electoral jurisdiction has its own rules as to who can vote by mail. In most states the rules are loosening to allow more people who want to vote by mail to do so. Traditionally people who want to vote by mail fill out a form produced by the election office which authorizes an absentee ballot to be sent to a specific location where the voter will be. As Election Day nears, other absentee voters continue to request ballots which can be mailed up until the Friday before Election Day. In most states, as long as an absentee ballot is returned before midnight on Election Day, and arrives within a reasonable amount of time (two weeks from Election Day), the ballot will be counted.

Check with your local election officials and learn the rules. If there are no restrictions regarding who can vote by mail, you may want to encourage all your workers – in fact, all your known supporters – to vote by mail. Every absentee ballot cast from a supporter is insurance for Election Night shortfalls.

In many cases, election officials print absentee ballot application forms in great quantities, and you can pick up stacks of them for distribution. In other cases, state or county election officials may allow you to print your own absentee ballot application forms. Of course, you are not allowed to print an actual absentee ballot, just the application for one.

Absentee Ballot Strategies

Direct Mail

At the very least, campaigns generally plan to obtain the list of those voters who have applied for an absentee ballot and mail them a brochure about the candidate. These people will definitely vote; the plan usually includes mailing them a brochure the same day the elections office mails the voter a ballot. The trick is to have your brochure arrive the same day as the absentee ballot so your race is fresh in their mind. Unless there is a coordinated campaign to increase the number of people who vote by mail, these voters are traditionally older, more conservative voters who vote in every election. A brochure that explains the experience and background of the candidate is appropriate.

Phone banks

The least expensive, but most labor intensive method to influence these voters is to call them. In most electoral jurisdictions, the elections office will release the names of the absentee ballot voters the same day as it mails them their ballot. An organized campaign will have a team assembled to begin looking up the telephone numbers of those voters beginning the moment that the list is released. If you have been keeping a list of those voters whom you know are your supporters and intend to vote absentee, you will want to call them first, to remind them to vote for you and to mail it in before midnight on Election Day.

Initiating An Aggressive Plan

Increasing your number of absentee voter supporters is a matter of good field organization. Many campaigns have begun to influence the number of people who vote absentee by aggressively seeking out their identified supporters and making it easy for these supporters to vote absentee.

Direct Mail

Mail a direct voter contact piece and include an absentee ballot application to all high propensity precincts where you know you have a number of supporters and voters.

Phone banks

Some campaigns are mailing their known supporters an absentee ballot application by using phone bank voter identification.

Canvassing

In a few campaigns (and in future campaigns), the door-to-door field canvassers are handing out absentee ballot applications after finding out that the voter at the door is a supporter of their candidate. The canvassers take the filled out form back to the headquarters and the application forms are submitted to the elections office shortly before the deadline.

In all of these cases, voters whom you have identified as supporters and have been given an absentee ballot should be phoned back at the time when the elections office sends out its absentee ballots. You want to remind these voters to send their ballots in as-soon-as-possible. In many ways, these absentee ballot strategies are becoming as important as the GOTV campaign which is waged during the last days of the campaign because of their increasing prevalence.

Get-Out-The-Vote (GOTV)

All the work you do in the course of the campaign should be designed to reach voters who can be convinced to vote for your candidate. Whether it is direct mail, phone banks, doorbelling or meetings with the candidate, these activities seek to inform targeted voters, repeat your

message and persuade the voters to support you. As you turn the undecided voters into supporters, you begin collecting a list of people that are your insurance that you will win.

However, even if you think that half the town appears to be supporting your candidate, less than half of them are likely to vote. Voting records in our country are very low. Less than half the population of most election districts is even registered to vote. Of those registered voters, an average of half of them actually vote. This means less than twenty-five percent of the people in your district are likely to go to the polls. It is even less when you include elections that cover only local contests, elections in off-presidential years and elections where there are no statewide candidates or initiatives.

A GOTV effort takes your volunteers and puts them to work in a highly organized four day (or less) plan leading up to Election Day. A strong GOTV effort can result in a three to five percent difference in the final election outcome. Like the absentee ballot plan, the GOTV plan requires advance planning and a dedication to collecting the names of supporters as they become known to the campaign. Specifically, GOTV takes the many volunteers, supporters and contributors of the campaign and puts them to work calling other known supporters who were identified during the phone banking and canvassing. In addition to reminding voters to go to the polls and casting a ballot for your candidate, GOTV efforts are famous for their hoopla, sign-waving, rallies and Election Day festivities.

The GOTV Plan

At least thirty days before the election, the campaign manager should have in place a listing of all the activities, the principle players and timelines that are necessary for a comprehensive GOTV plan.

You can expect that your loyal workers will take time off from work (some look forward to doing so prior to each Election Day); other volunteers will devote far more hours than they would for ordinary projects; and still others will be more inclined to follow the rules more clearly than earlier in the campaign. Given your realistic work force, devise a variety of projects over the course of days leading up to Election Day. Have a range of project assignments ready for people who can work from full-time for four days to those who can only help out for a few hours. Encourage workers to choose different assignments each day as the change in roles is likely to keep them more interested (and coming back). Remember that the volunteer who is happy and interested in her assignments is more likely to do her part longer, better and with more enthusiasm.

The Key Ingredients for a GOTV Plan

The plan. A well-thought-out list of the projects you will accomplish beginning the week before election. The plan should include numerical goals for the number of volunteers you will need and the number of voters you intend to reach. It should also contain a budget and a list of supplies required to handle all needs.

A volunteer force. You need to gather the names and the hours each person is available to work at least a month before the GOTV plan swings into effect.

A central calendar. Critical to the operation is a calendar which shows the times, dates, locations and leaders for each of the GOTV projects.

A GOTV Coordinator. There are dozens of little decisions that will need to be made in the pressure-filled atmosphere of the last week of the campaign. Only one person (preferably not the manager) should coordinate how all the pieces are put together. The manager and coordinator will have to make many decisions regarding remaining money, people and other resources in the waning hours of the campaign.

Key supplies. Last minute doorhanging pieces, phone lists, balloons, yard signs, postcards for mailing, maps, T-shirts, campaign buttons and other materials need to be gathered from all the storage locations including car trunks and basements. Check everywhere before you order anything new.

GOTV Projects

Weekend Rally

As the hours dwindle, it is good to pull the team together for a rousing kick-off of the GOTV events. These rallies (held either on Friday night or Saturday morning before the election) can build people's spirits and draw needed free press. The GOTV coordinator can outline all the projects (don't worry about security; you can announce every activity) and get last minute volunteers signed-up. Packets for doorbelling can be handed out and yard signs for the last sign blitzes can also be distributed.

Phone calls

During the campaign, you have been identifying people who are your supporters. If you have been meticulous and organized during your phone banking, you could have hundreds or thousands of voters whom you expect to vote for you in your database. Depending on how many volunteers you have in the GOTV efforts, you might begin re-calling your voters on Saturday in order to reach them all before the polls close on Election Night.

It is very important to figure out how many calls have to be made so you can secure enough phone locations. Finding enough phone lines takes time and persuasion with people who already own multiple telephone lines. The new installation costs of temporary phones make acquiring your own too costly for most campaigns. However, some special interest groups might rent phone lines as part of their in-kind contribution to the candidate. Start early and ask everyone.

Determine the number of phone lines you need. Let's say you have three thousand GOTV calls to make and your phoners will complete approximately twenty per hour. That means it will take 150 hours of phoning to complete all the calls. If you want to complete these calls in three-hour shifts, you will need fifty phonelines. If you do your phone banks over two nights' time, you can cut your need down to twenty-five phone lines.

Door-to-Door Drops

In those precincts where your targeted voters live, you have already sent targeted mail pieces, placed yard signs and spent lots of time going doorbelling and attending meetings in these neighborhoods. Now, it's time to remind these voters to vote. A popular reminder many campaigns choose is to print small doorhanger pieces for high turnout precincts which can easily be affixed to doorknobs and screen doors. These simple flyers might have your picture, the campaign message, and the specific name and location of neighborhood polling stations.

The "Before Dawn Brigade," a group of brave dedicated volunteers, usually assembles around 4 a.m. in the targeted neighborhoods and leaves doorknob pieces on the front doors of sleeping voters.

The "Before Dawn Brigade" should be dressed in warm clothes with flashlights and proper identification. Volunteers should go in pairs and beware of sleeping dogs that might awaken angrily. The volunteers should be very careful when placing the doorknob pieces in the appropriate precincts. Late at night and early in the morning, street addresses can be confusing. If you are dropping pieces which have the names and locations of polling places, you must make doubly sure that you are leaving the right pieces on the right doorknobs. Very specific training sessions should be scheduled on election eve insuring that everyone is following the correct rules.

Visibility

Although you think there is nothing going on in the hours prior to the opening of the ballot boxes, it is time for some hoopla.

Sign-waving at key locations helps to raise your visibility and serves as a reminder to vote on Election Day. Have key volunteers gather at major traffic intersections and wave candidate signs. It helps to have the candidate waving at voters en route to work. Sign waving usually begins between 6:30 a.m. and 7 a.m. on Election Day and lasts through morning drive time, the noon lunch hour and the afternoon drive time. During the night before the election, it is customary to

conduct sign blitzes, taking all the remaining yard signs and placing them wherever legal. In some cases, local officials will even look the other way and allow campaigners to place signs everywhere (as long as they are taken down within 24 hours after the election).

In some states, signs and other candidate identification are not allowed if they can be seen from the actual precinct polling place. Check the local ordinances. If there is no restriction in your area, place your yard signs close to polling places as a last minute reminder for people to vote for you.

Where legal, get roving vehicles with loud speakers to travel through targeted precincts and announce that Election Day has arrived. Some campaigns have car caravans which drive through town. The colorful cars with signs and balloons help raise the attention for the campaign. However, be careful that these visibility projects do not anger people. If a voter misses an appointment because she is stuck behind your candidate's car caravan, you might have just lost a vote.

Poll Watching

In most areas, election reform and civic interest in insuring a fair election has made it less necessary to assign a poll watcher to each precinct. If you suspect that there will be unfair practices at the polling places, you might want to assign a poll watcher. The campaign attorney should set the rules for monitoring the polls and train all the poll watchers. In addition, the attorney should be available and near a phone the entire day, particularly after the polls close as the votes are counted, prepared for counting or transported to the election central headquarters.

Checking off Voters

More important than poll watching is getting the list of those voters who have cast their ballots so your campaign can focus on those who haven't voted yet. In a very sophisticated and large volunteer-based campaign, you might want to pick up the list of people who have voted by noon and check them off against your list of identified supporters in each precinct. You can then re-call those supporters who have not yet voted and remind them to go to the polls. You can also do the same thing at 5 p.m. This process is slow and tedious. Other campaigns with fewer workers will simply re-call people until they say they have voted.

Rides to the Polls

Providing rides to the polls is a service that every campaign traditionally offers its voters on Election Day. Of course, there is little guarantee that anyone whom you drive to the polls will automatically vote for the candidate whose campaign helped get them there. They usually do. The campaign does not need to provide a lot of cars and drivers, as the service is seldom requested more than a half dozen times during the entire day.

Day Care Services

You will have far more volunteers if you provide day care on Election Day. A central location with a few qualified day care providers should be all you need. Assign specific times and locations where you will offer child care. Do not offer extensive recreational or feeding services as you want to limit your responsibility. Set reasonable standards for which age groups you will handle. Do not attempt to offer everyone services, particularly if you only have teen-age baby-sitters who are willing to watch children while parents go to vote. Keep it simple and make sure that there are very responsible, experienced people in charge.

Giving Directions to Polling Locations

On Election Day there are always voters who have no idea where they vote. Always have someone familiar with the town map at the campaign headquarter's receptionist phone on Election Day. You will get a few dozen calls asking where a specific voter needs to cast a ballot. Make sure you have both a road map and a precinct map, in addition to a list of the polling places and precinct numbers.

Victory Celebration

Getting out the vote also requires making sure there is a group dedicated to putting together a great victory party. Keep it inexpensive and make it at a location where people want to gather. Where some campaigns prefer the high-priced campaign party at a local hotel or banquet hall where the returns are phoned in, other campaigns opt for less expensive celebrations and turn their headquarters into the campaign party.

In all circumstances, the victory party should not be on anyone's list of responsibilities until the polls are within minutes of closing. Phone calls should continue until an hour before the polls close.

A dependable worker should be sent down to election central to report results. After she leaves to set up her sentry post at the elections office, it is time to straighten up the office, put on a new dress... and a new smile... and get ready for the celebration to follow. In these days of negative ads and TV commercial mania, field operations are your best opportunity to campaign in the cleanest way possible. Your goal is obvious and refreshing: reach your targeted voters, persuade them to be supporters, and remind them to vote.

There is nothing to shorten the hours between the closing of the polls and the awaiting of returns, but the hours are easier to bear if you know you have produced a well-organized field, absentee ballot and GOTV operation.

Keep your cool; good field means the champagne is on its way.

Chapter 15

The Media

The press is the most intimidating and often misunderstood variable in every campaign. The media, as they are collectively called, can take a thriving political campaign and destroy it with one bad story. On the other hand, many a candidate has been pulled from the jaws of defeat by an enterprising reporter who discovers a “fatal flaw” in the opponent’s campaign.

Radio. TV. Newspapers. Blogs. Weekly publications. Trade journals. Employee newsletters. They all have their advantages in your media plan. As with all aspects of today’s campaign, a smart campaign manager will look to her targeted voters to find the clues for what mediums she should most actively court.

Not enough campaigns spend the time to learn about their voters’ media habits. TV stations rely on the Nielson ratings; radio stations rely upon the Arbitron and Birch ratings, and newspapers use circulation figures which must be printed every year as certified by an independent source.

Know who reads, watches, listens and e-mails your media – often they are the same good voters whom we want to attract to our message.

Getting To Know The Media

What are the news sources in your district? Who are the important and influential people in the media world who will help voters decide your election?

The very first step is to compile a media inventory. In most communities, a private company or the local public relations club will put together a media directory with the names, addresses, telephones, e-mails and fax numbers as well as other key information. Reporters come and go fairly often so it is good to update your own media quick reference file that you can reach online.

- **Who is covering your campaign?** Find out the names of the specific reporters who will be covering your race. Take care to add the e-mails and home telephone numbers of the reporters with whom you will work most. Know what hours they work, when they plan to be on vacation or have regularly scheduled days off. This way you won’t plan a major media announcement when your most informed reporter is unable to cover the story.
- **What are the deadlines?** Deadlines change for different editions, newscasts and days of the week. Interview the key reporters and assignment editors to get their best advice as to when you should drop off releases, the candidate’s schedule, and other campaign event news. Generally, radio deadlines are within an hour of the newscasts. If you had the proper equipment, you could feed a radio station a 30-second radio interview, actuality or sound bite from the candidate an hour before the broadcast.
- TV newscasts have deadlines in the late afternoon, but most prefer TV time taped well before 2 p.m. for evening newscasts. If you have an event or announcement that is significant enough to warrant live coverage, your best bet is to convene the event at 12:00 noon. Many stations have a noon newscast that is relatively accessible. Subsequently, your story would likely air on their evening broadcast as well.
- If the newspaper is a morning newspaper, the reporter’s deadline is anywhere from 8 p.m. to midnight. Remember that editors have deadlines also; most of the decisions for the next day’s paper are made well before the 8 p.m. deadlines. If the newspaper is an afternoon paper, the deadlines could be from 9 a.m. for early editions to noon for the late ones.
- **What is the chain of command?** Make sure you know who the newsroom editors, assignment editors and weekend editors are, who the managing editor is, who sits on the

editorial board, who owns the media (is it part of a larger chain), and what other connections in town the owners have. You need to know, for example, if the general manager or publisher of the largest newspaper is also the president of the Chamber of Commerce.

- **What is the importance of email in the media mix?** So much has changed now that the media has almost immediate access to candidates, campaign managers and key strategists. Reporters often have the personal cell numbers and emails of their candidates, and they expect instant response. Access to reporters is fine, but give yourself permission to think before you answer. In fact, it is better to ask reporters to email you their questions, as responding online means you are more likely to think through your response, and it stops you from responding to other questions or making public gaffes off the cuff. Give out your personal email but refrain from the personal cell phone number.
- **What is each media's plan for covering the campaign?** Most media outlets will have their own special questionnaires, debates, candidate forums, special editorial board question and answer sessions, special profiles, and weekly political notebook sections. Some broadcast media will also allow free air time to candidates. Find out in advance what the plans will be. The media calendar will obviously have precedence, and it is best to be as well prepared for each opportunity as possible. And while you may fight for media coverage in the early stages of the campaign, it will come fast and furious during the final few weeks before the election, so be prepared.
- **What kind of work can you do to make the reporter's job easier?** If the radio stations will accept prerecorded interviews and short clips on tape, find out what their restrictions are for dropping off your taped versions of news releases and whether they accept them over the phone.

Will the media accept your photos or will they refuse to use anything produced by the campaign? Find out if the newspapers will use your press releases or if they even intend to cover news conferences. Some will use both for back-up information or short political summaries at the end of the week. Some TV stations will allow videotaped comments if the candidate is not available or if the station's cameras were not able to get to a press event. Again, check out the facts in advance.

Never be afraid to ask reporters questions: in most cases, they will be happy to help you. An exploratory trip on the part of the communications director to the local news organizations is a good way to compile all the important details that will make your media relations easier in the months to follow.

The Communications Director

The person most responsible for building a positive, respectful relationship with the media is your communications director, (press secretary, media director or press person whichever you prefer). In the past, a communications director was considered a luxury position. Not so anymore. An articulate, proactive, and energetic communications director provides your best chance of convincing a cynical reporter who has been through 20 campaigns that your views on economic development are creative, unique and newsworthy.

The communications director must be credible, preferably someone who has direct media experience either working as a reporter, public information specialist or public relations professional. If not, look for a wordsmith, someone who can write lucidly and on deadline. It helps to find a communications director who is perceived as honest above all else and easy to talk to. A reporter has to want to take a call from the campaign spokesperson, so your communications director must be someone who knows what constitutes news. The communications director also must be accessible 24 hours a day.

Duties of a communications director include:

- Organizing news conferences where reporters are called to a central location to hear the candidate make an important announcement, respond to an attack or discuss a problem.

- Writing and distributing press releases on important matters. In today's world of emails and fax machines, a lot of time is saved by sending news releases to reporters electronically. However, the reporters should be made aware of the release coming their way, and should be called again to insure the releases landed in the right hands.
- Assisting the candidate with debate/speech preparation and briefings for special events.
- Working with the scheduler to build in special press opportunities for the candidate to emphasize her theme, in conjunction with, relevant community events and activities.
- Writing speeches and drafting responses to the many questionnaires that appears in each campaign cycle.
- Reviewing copy for brochures, flyers and letters to the special interest groups.
- Maintaining a clipping file and e-mail links on the candidate, opponent and pertinent issues as well as a tape library of all those radio newscasts, TV appearances and recorded speeches. This means a communications director should always keep a tape recorder handy to capitalize the candidate's comments (especially when reporters are conducting interviews).
- Working on the message, issues and special questions the candidate is likely to face.
- Knowing the technical needs of the media (backdrops for TV, special set-ups for microphones, extension cords for broadcast reporters from smaller stations, etc.).
- Most important, serve as the advocate for the candidate when with reporters...and serve as the advocate for the reporters when with the candidate.

The Candidate And The Communications Director

Serving as the spokesperson for another person is a difficult task. Along with the manager, the communications director is one person --no matter what size the campaign--who must have direct and unrestricted access to the candidate. You only court trouble when:

- You force your spokesperson to speculate about a response on a controversial topic.
- You risk your communication director's credibility if she has to learn about a critical problem of the candidate from the media.
- You inform the communications director only on a need-to-know basis instead of including her in the loop. Some candidates and managers feel that they should only tell their media director the facts they want her to relay to the media. After all, if the communications director doesn't know about a critical problem, then she can never be put in a compromising position or have to lie about it. Or, she never has to worry about accidentally leaking information.

Such strategy shows little regard for the importance, experience and role of the communications director. If there is no trust, the communications director cannot exude the air of confidence needed to deal with today's press corps. Build that trust and let it work for you not against you.

The rest of the staff needs to know that only one person deals with the media. All media inquiries should go directly to the communications director. If she is not available, then the campaign manager should take the call if the reporter is on deadline. If not, the call should be handed to the communications director immediately upon her return. Calls from the media on deadline are critical. If a reporter needs to talk to the candidate in 20 minutes, the communications director should ask what the general subject is and then track down the candidate. If the subject concerns a controversial issue that the candidate needs to research before responding, the communications director should make that decision. In most cases, however, the candidate who responds on deadline is likely to build up credibility for the future.

A forward-thinking communications director will spend a respectable amount of time "schmoozing" with reporters. Often times she will return from time spent with reporters with important news of the opponent, other key races and healthy gossip from the outsider's view of

your campaign. During your first campaign, chances are you will be genuinely surprised at the amount of information you will learn about your opponent from reporters. Remember, that it works both ways. Loose lips have sunk more than a few campaigns because a communications director, campaign manager or almost anyone in the campaign revealed too much to a reporter.

Finally, don't ask your communications director to lie. You wouldn't lie for your boss if she asked you to do so, so don't put your communications director in that position, no matter how tempting.

The goal of any strategic campaign operation is to develop a three-way support system between the candidate, the manager and the communications director. Open debate should be encouraged and an honest exchange of ideas, approaches and style should result. With reporters, your strongest asset is your character and integrity and the communications director plays a crucial role in building that rapport.

The reporters are your best link to the public, and your communications director is your best link to the media. Choose well and your communications director will build bridges straight into the hearts of your targeted voters in the least costly way of all: through your friends in the media.

The communications director, by virtue of her time spent in public outreach, is also one of the most important people to help insure that all facets of the campaign are revolving around the agreed upon message. The candidate's speeches, the news releases, the media events, paid TV and radio spots, door-to-door canvassing, phone bank scripts, campaign brochures and all other campaign opportunities should reflect the message and theme of the campaign.

Tools To Use With The Press

Campaign Photos

A political campaign can never have enough good, candid and serious photos of the candidate. In most campaigns, the candidate usually has one professional photo taken by a local studio and then she is at the mercy of campaign volunteers who take snapshots of her at events.

Before the campaign stops to realize how unflattering these pictures are, the "high school graduation" studio photo picture has probably been used in a half dozen local publications, and, the snapshots (blurred and filled with too many people) have been put in brochures.

Photos are truly worth a thousand words. Get a good photo file started long in advance of a campaign. Find the best photographers among your peers and friends and bring them into the campaign. Then, take pictures that reflect your life and show the kinds of people you will be targeting.

You can show much about the candidate through photographs:

- Pictures of the candidate relaxing with her family (at the breakfast table, in the family backyard, in the family car)
- Pictures with members of the target population (at senior centers, with women who are working on community projects, with people of color)
- Pictures of the candidate listening to constituents; talking with officials and pointing to maps or problems
- Photos of well-known officials, citizens and celebrities with the candidate
- Pictures of the candidate with children (at a day care center, school or playground). Be sure to use a private facility as it is illegal to take pictures at most public schools and daycares.
- Photos of her on the phone, behind her desk, or acting in her professional capacity

If you cannot find a photographer within your circle of friends and supporters, then invest in candid pictures as well as more serious ones for your campaign photo file. And, make sure that you have plenty of copies of "the best" picture. The best message should be repeated most often, so should your best picture. Remember, it is important to control what pictures you give out in

the course of a campaign as there will be many that the press will take, and use, that may not be as generous to your profile as you would prefer.

The Press Packet

As soon as the campaign gets underway, the communications director needs to put together a press packet that will start each reporter's personal file on the candidate. In most cases, it is good for the communications director or the candidate and her communications director to hand these press kits out personally to each important reporter covering the race. The packet gives you an instant entry into the offices of all your press corps. The press kit is also used as a handout at the candidate's announcement.

The packet should include:

- The Candidate's Biography--This should be no more than one page, doubled-sided and gives the candidate's professional, educational and personal background.
- Press Clips or Articles --Past news clips and articles written by the press about the candidate are always credibility-building tools. Take three or four important clips which quote or include the candidate (include letters to the editor of special columns she has written, etc.), and copy them for the press to begin its review of her.
- The Candidate's Statement of Candidacy --This is your statement explaining why you are running for office and outlines your major issues.
- Campaign Brochure --If you have a brochure for the campaign, include it in the packet to show you are already organized enough to have campaign literature. Also, if you have mailed letters to your supporters asking for support and money, consider including one of these pieces in your press kit.
- Campaign Fact Sheet --A quick reference sheet which has the names, titles and telephone numbers (home and office) of key people in the campaign.
- Photo of the Candidate --Include a 5 x 7 inch photo of the candidate with her name and the office she is seeking written in pencil on the back.
- All of the above are available online from your web site so reporters can download all of the materials online. Be careful not to put too much online as everything that appears there is directly usable by the media – and your opponents.

The News Release

The news release has great power; it can be a great friend or a terrible nightmare for your campaign. But, it is a tool that must be used wisely.

News releases must disseminate genuine “news” about the campaign. If your campaign treats releases as pure propaganda, be assured that the media will do the same. They are also tempted to look at everything else coming out of your campaign in the same light.

Before you write a release, ask yourself if it is something that you would want to read if you were not working on a campaign. Write the release as if it were a story in the newspaper. Begin with the five W's of journalism: who, what, when, where and why. Answer as many of these basic questions in the first paragraph as possible.

Make sure the release shows action. A good release outlines a problem, provides the candidate's background in the subject, explains what she intends to do about the problem and then offers a few clever, concise quotes which show the candidate taking a strong stand. The release should tie in with the candidate's theme and be aimed at her targeted voters.

The release could end up in print in some small newspapers, or be used late at night or on weekends in some radio markets. Whatever its use, it should be drafted by the communications director, reviewed and edited by the campaign manager and approved by the candidate before one media person learns of it. The release should have every word spelled correctly and be grammatically perfect.

In some instances, it may be more appropriate for the campaign to issue a “statement” rather than a press release. There are no hard fast rules guiding this decision, but generally if the subject matter is strictly a matter of the candidate’s opinion, a statement is the preferred format.

Nothing will ruin a candidate’s credibility more than a news release that has inaccurate, misleading or unclear information. Get the facts straight and then check them again before they are given to the media. Make sure you have listed the name and telephone number of the communications director on the top of the release. Most communications directors also add “FOR IMMEDIATE RELEASE” in the upper left hand corner.

Add your own headline that tells what the candidate is announcing and keep it short. Your job is to attract the reporter’s attention, and with all the competing information the reporters have to deal with, the shorter the release, the more apt it is to be read.

The News Conference

Reporters are far more tolerant of news releases that fill their e-mail than they are of news conferences where the candidate may not have much to say. Political reporters have grown skeptical of the candidate news conference and rightfully so. In most cases, you only have to abuse the privilege once. If you invite all the media to a news conference and have little which is newsworthy to report, you may never have another reporter at a future news conference.

If you have doubts about whether or not a potential news conference is newsworthy, call a reporter or former reporter and ask them. Be critical of your own press ideas. Some criteria to consider is whether or not this information is new to the reporters; is it “news” to the general public; can it be graphically explained at a press conference; will the conference provoke the press to call your opponent and give him equal time which could end up hurting you? Have we asked the media to show up for news conferences too often?

If you decide to go ahead with a press conference, here are some suggestions to make them more successful:

- Announce the news conference the day before it is scheduled with a media advisory which you can email, fax, and mail or personally drop off to the reporter. The day of the event you should follow up the advisory with a reminder phone call to urge the press to attend.
- Set a time which is most convenient to the media. Be sure to rotate the time of each news conference so you aren’t always playing to one media source over another. If the largest media source which attracts your targeted voters is an afternoon newspaper and your news conference is scheduled for late morning, you might want to pre-release the information to the political reporter of that newspaper.
- Have a few campaign staff members and supporters present to give the sense of a small crowd. If there are important endorsers who have direct experience in the issue for which you called the press conference, have them in attendance and introduce them at the start of the conference. A small crowd can also help give the impression that more reporters are there than actually might be the case.
- Select a location that gives a good visual backdrop to the event and arrange campaign signs so the cameras will pick up the name of the candidate. However, make the location convenient to the reporters. If you have a great location that is an hour away from the news desk of your most important political reporter, don’t be surprised if that reporter doesn’t show up. Reporters have several stories a day that they will have to cover and cannot afford the luxury of a half day with you for one press conference.
- If camera crews arrive late, wait for them to set up before you begin. You can talk informally with reporters about other campaign news before the conference gets underway, but keep the critical subject matter until everyone is ready. Start the news conference within minutes of when you called it.

- Give some brief background information about the campaign to date, reiterate your themes and message and then outline your news conference subject. Make it clear, concise and quotable.
- If your conference has other speakers (endorsers or guest elected officials) have them standing beside you and introduce them at the start of the conference. Do not have more than two other people besides you speak. If there are multiple endorsers, have one spokesperson.
- Keep the press conference short. If you have more than one speaker, limit each to less than five minutes. If just the candidate is speaking, she should speak for no more than 10 to 15 minutes (at the most) and then leave another 15 minutes for questions and answers. Don't let the conference drag on for a long period of time. If one reporter drones on for several questions, answer one question and then call on another reporter in the same breath. If the first reporter persists, then state you will be happy to continue talking to him after the press conference.
- If the media asks a question that you cannot answer, don't make something up. Rather, say you will find out and get back to the reporter within the day.
- Hand out a press release which summarizes the candidate's comments and make sure that the communications director makes the rounds of all the reporters to get the names and media sources of each press person attending.
- Announce when the press conference is over and thank the press for attending. Do not linger unless there is a reporter with whom you want to speak individually. Remember the rest of the press is watching so be careful not to appear to be picking favorites.

Hints On How To Attract The Press

- **Target the issues that the media feels passionately about.** These include a call for more open meetings at every level of government, campaign spending limitations and other campaign reform, a challenge for more candidate debates, ethics in government and public disclosure of all special interest dollars that may influence campaigns or legislation and access to more information in the government files. At the very least, these stories, when proposed as campaign stands, always get covered, if your candidate is the first to adopt them publicly.
- **Attract more media with your open style.** Constant accessibility, particularly on deadline and at times of high stress and negative attacks can be more important to the long term relationship between a key political reporter and candidate (or manager) than waiting until you have devised the perfect quote of response. Letting reporters talk when they want to offer valuable suggestions (as they invariably want to do) is critical. Many candidates will respond to a reporter's thoughts by saying, "Yeah, well, we're already doing that." A better response is simply to say, "That's a good idea." If the reporter then sees an off-hand suggestion she made end up carried out in the campaign, she will think highly of the move and the people implementing it.
- **Reporters are voters.** A little bit of extra effort can go a long way to give a reporter a look at your field operations from the inside of her own home. Check out the home addresses of reporters and send them your direct mail. If you are doing phone banks, make sure the reporters' home telephone numbers are on your list.
- **Preview all** your print, broadcast and even direct mail ads with the press. As a candidate, stop by local newspapers, radio and TV stations to see the reporters you seldom hear from. Train yourself to remember their names. Invite them to stop by the office and spend a day, any day, on the campaign trail with you. Invite them to a steering committee meeting and open up your books if you must. There is precious little campaign strategy that couldn't be placed on the front page of the local newspaper: the real success of a campaign isn't the written plan, it's the implementation. When filing campaign spending and contributor reports, have extra copies made and delivered first to the press.

- **Have a separate tally sheet for the media** that records other information that the official reports don't require: how many contributors you have, how many contributions under \$100, how many are over \$100, how many contributors have given the maximum and who they are (this usually is better to reveal first then to have the press "discover" later), and how you are spending your money (readily used info includes what percentage of the total amount spent was paid for media, staff, direct mail, office expenses, etc.). If you tally and present the information that shows your campaign in its best light, the press will be impressed.

Newspapers

Newspaper coverage of a campaign shouldn't be limited to headline stories. Newspapers are a veritable wealth of opportunities for the enterprising communications director.

Consider:

The A to Z of News Stories

- Announce your candidacy.
- Be the first to reach 1,000 contributors under \$100.
- Challenge your opponent to a debate.
- Promise to open up more information/meetings to the public once elected.
- Allow a reporter to sit in on your Steering Committee meeting.
- Reveal your opponent's abysmal record on an important issue.
- Campaign for 24 hours in unusual places (shift changes, hospitals, diners, etc.)
- Invite a reporter to campaign with you for 24 hours.
- Announce top officials who are endorsing you (and have them present).
- Spend a day in the life of a government employee whom you would have jurisdiction over if elected (work in a day care center, on a hazardous waste construction site, as a recycling refuse worker, a police dispatcher's helper, etc.).
- Propose specific action agendas to address a public issue that is confronting your constituency.
- Offer to host a good question and answer session from a panel of children on kids' issues.
- Release your income tax statements for the past three years.
- Share the podium at a news conference with your spouse, business colleagues and local officials to prove your partnerships work in politics, in professions and at home.
- Stand at a grid-locked highway intersection and present your transportation policies.
- Outline your plans for campaign and election reform.
- Return a contribution from a local business that is polluting the local environment or running a strip club.
- If there is a citizen's complaint bureau in the government where you are seeking office, find out which agency logged the most complaints and announce a plan to correct those problems.
- Look for little things you can do to make government work better: fix a specific pothole, work on changing traffic light synchronization so that a car can get downtown without stopping five times in five blocks, change the burned out bulbs in parking lots or repair the park benches by the lake.
- Start an initiative to change a law which legislators have been reluctant to take up but the public would probably support (environmental, educational, tax change).

- u. Go through the budget and suggest places where you would cut the budget in order to put more resources into programs that are closer to your priorities, and the priorities of your target audience.
- v. Watch the newspapers for a human interest story about someone who has fallen through the cracks of “the system” and offer to help correct their problem in the future. Be careful you don’t appear to be self-serving at someone else’s expense.
- w. Announce a five-point plan to improve one of the district’s critical problems: education, transportation, economic development, or growth planning, or crime. Hold the press conference at a location that visually depicts the problem.
- x. Watch the news to make the news. If there is a tragedy, be there not to exploit the tragedy but to offer help. If there is an escape from jail or a scandal in one of the government agencies, call a press conference to explain what you will do about such problems.
- y. Announce the opening of your headquarters with the appointment of your campaign manager, campaign chair and other important people. Juxtapose this with your opponent’s team and come up with a comparison of the differences of both the races.
- z. Participate in public forums that are dealing with “hot” issues.

Not every news story is easy to sell to every reporter. The days of pack journalism are reserved for presidential campaigns. If you have too many press conferences with too little news, you can expect a dwindling journalism crowd at each succeeding news conference. You may have to focus a great press opportunity on one specific reporter and use another bright idea on the next reporter.

If you want to get your candidate’s name in the paper, you must create the news by doing something unusual, provocative, controversial, or informative. Actions speak much louder than words, so before you announce a great idea, make sure you have the right backdrop. Also, be direct and remember to get your message repeated in the course of whatever news you create.

Letters To The Editor

- **Candidate letters:** Keep the letters from the candidate short, substantive, to one point and clever. Do not abuse the privilege by writing every week.
- **Campaign manager letters:** Have the campaign manager write letters to the editor which make any corrections or clarifications to other letters to the editor.
- Letters of support: Many of your key supporters will want to write letters of endorsement. Ask them if they might run these letters past your communications director so the letters will reflect your message goals. In addition, encourage your supporters to write letters on specific points that help the campaign.
- Letters to point out your opponent’s shortcomings: The letters to the editor column is often the best read page in the paper. Encourage supporters to point out those inconsistencies with your opponent’s stand and his record.
- Often letters can be disguised to include important dates for events where readers can look forward to meeting and talking with the candidate herself.

Political And Social Columns

In every campaign, there are cute stories, some of which might even poke a little fun at the candidate herself. During the heat of the campaign season, newspapers will have political notebook columns that capture these slices of political life. Cultivate these press contacts and be on the lookout for cute stories as these reporters are usually very interested in humorous accounts of what goes on behind the scenes of a political campaign.

Don’t be afraid to leak information about other campaigns as well.

Editorials And Editorial Board Meetings

As the campaign gets underway, it is important to make an official appointment and go through the editorial board interview. Throughout the campaign, you may want to appeal to the

board on issues that you think ought to be on the frontline of the public debate. Calls for campaign reform are also frequent subjects of election season editorials.

How you campaign, how much is spent on campaigns and the shallowness of the current debate are other subjects which some editorial boards might find important as editorial material. If you have a major plan for correcting a serious problem, or if you have revealed some very interesting information about a local problem, chances are the editorial board will entertain a meeting with you to discuss it.

Most critical in the life of the press-candidate relationship is the editorial endorsement. Some newspapers hold their endorsement until the last days of the campaign and are credited for changing the outcome of many races. You must adequately prepare for your candidate interview with the editorial board. Check the questions that were on the newspaper questionnaire and review important editorials that the newspaper featured in the past year. You can never be too prepared for an editorial board meeting.

Candidate Questionnaires

Newspapers generally reserve an entire page for an election review the weekend prior to the election. Although there are many questionnaires you will receive during the course of a campaign that are a waste of time to fill out, the newspapers' are very important. Make sure the candidate, manager and communications director review these election guide questionnaires prior to deadline day. **DON'T WAIT UNTIL THE LAST MINUTE TO FILL THIS OUT.**

Answer all the questions in short, concise sentences and do not leave any unanswered. As you receive questionnaires from other groups, make sure you know what will happen to them. Many a candidate has been surprised to see an obscure-looking questionnaire show up as an insert in the newspaper the day before the election.

After completing a few questionnaires, you'll begin to notice you are answering similar questions over and over. It will save time if you input the questions and answers of the questionnaires on a computer. Then when you come across similar questions you can copy the answers from one questionnaire to another.

Candidate Calendar

Ask your scheduler if she can prepare a public speaking engagement/public event calendar for the press each week. Although these calendar items may not be picked up in their entirety, they will give the media a sense of momentum about the candidate. If there are only a few public events, add other items such as where the candidate is walking door-to-door, special constituency meetings and even those hours when she will be available for meeting with members of the public. These "open door" sessions are created as public events where anyone can stop by to talk to the candidate (usually at the campaign headquarters). They look very good on the candidate's public calendar and may entice a reporter to drop by for quiet time with the candidate.

Newspaper Photos

The photographers of some newspapers are paid to be on the lookout for great candidate shots. Strike up a conversation and a relationship with the photographers; they see the campaign through a lens but also through the eyes of a voter. Most are very interested in campaign hoopla and human interest angles. When the photographer calls to schedule time with the candidate (or when they succumb to your requests to take a new picture for their files), make sure the communications director has planned the photo session in advance so the candidate will be doing campaign activities which highlight points, people and themes important to the campaign. Seniors and children are always a phone call away, so even if the photographer calls at the last minute to drop by for a photo, have your supporters there first.

Radio

Radio stations are still the medium that responds best to enterprise on the part of a campaign. Most are willing to listen to your actualities or statements regarding a news story. And, most don't have the luxury of devoting a full-time person to the political beat. Therefore it is very important to get to know all the news reporters, the key disc jockeys and the talk show hosts.

Do your homework first to find out where your voters are tuning in to get their radio news and entertainment. The Arbitron reports will give you profiles of the listeners, and with your targeting information, can help determine what coverage you need.

Radio News Hours

Find the local stations that have local news every hour or half hour. Some stations have local news on the half hour and national news on the hour. Others will have a few national news stories from the wire services, then round out the rest of the five minutes of news with local stories, sports and weather forecasts. Because these deadlines are every hour, there is more news that these stations accept. It is important to call stations (particularly smaller stations) right after the news hour, as the reporters are usually involved in writing copy for the newscasts up until the moment they go on the air for the hourly newscast.

Remember to have your news story summarized to less than three sentences and have your tape machine cued up to be able to play the candidate's quotes, should the reporter be interested in the story. One important note, the earlier in the day that you can call the radio reporters, the better your chances will be of getting the story on the air. This means 6 a.m. in most cases. As with other people, the later in the day that you call, the more hectic it is likely to be for the reporter. Ideally, you want your news clip to be on the air during the early morning drive time.

When you call the reporter (know her name before you talk to her), give her a brief description of the story and ask if you can play your candidate's comments for her. Many stations welcome the radio bites that are prerecorded comments from the candidate. You will need a good tape recorder, your telephone, and a transmission enhancer known as a recorder coupler. This entire equipment system will cost about \$100. Check with your local audio equipment stores and explain what you want to do. They will offer you several systems.

Before you begin the taped message from the candidate, lead in with a short summary comment about the clip ("This is Judy Baker responding to the new crime statistics for the county..."), then countdown "three, two, and one" and begin the candidate's comments. You might want to fax the radio reporter with follow up comments contained in a written release.

Special Reports

Radio stations are now more public service oriented. Many have adopted special interest concerns regarding the problems that affect their community. Mini-series reports on everything from street gangs to neighborhood planning, from the environment to transportation planning are on today's radio station agendas. These mini-series special reports are usually announced in advance. What your candidate can do is call the reporters working on the story and offer information they might not have. If you handle your information intelligently, you can usually be the person who ends up on the taped report.

Radio Talk Shows

The call-in radio talk shows are very popular throughout the country. Most of them will have guests along with the host. As the campaign gets closer to Election Day, the stations will most likely ask both your candidate and the opposition. However, before that joint appearance, consider having a third party call (not from the campaign) and suggest a format which includes your candidate talking about an important issue in which she has some expertise. Also, listen to these shows several times before your candidate is a guest to learn a little about the people who call. If the questioners are argumentative and prone to shouting, insulate your candidate by having several of your supporters lined up to call. Instruct your callers not to toss "soft" questions, as they become instant giveaways that the call was planned by the campaign. Ask tough questions that the candidate is prepared to answer.

If the target audience you are courting listens frequently to these shows, you should listen as well and be ready to call in with pertinent information about your candidate. In many cases, a talk show host is only too anxious to have a candidate call and respond to an issue.

For every speaking engagement, make sure the candidate is well prepared for the radio call in show. This is a perfect time for role-playing. Have your entire staff spend a half hour asking the candidate any question that comes to mind. This not only gives the candidate a good dry run of

the call-in show, but it also gives the staff important time with the candidate and makes them feel needed.

Special Broadcasts

Broadcasting from a special location is a popular tactic in radio these days. Watch for your favorite, targeted station's announcements of special broadcasts. If you know the radio personalities, it should be easy to get your name mentioned if you stop by at their remote broadcasting booth. Take a few supporters with you and spend some time talking with the disc jockeys at the booth. Frequent remote locations include county fairs, community parades, local shopping centers and the opening of new businesses.

Television

Although we would like to think that the medium that most thoroughly covers the issues is the medium that influences most of the voters, this is seldom the case. With the average person watching six hours of television a day, TV becomes the most powerful of all media options. Newspaper readership has continued its decline throughout the TV and Internet age (although it's hard to say if people are actually substituting one medium for another or just running out of spare time). Newspapers, which may afford more coverage of the issues, are widely relied upon by some of the voters, but TV captures the emotion of far more of the voting population. It is critical to review the Nielson ratings to find out what news shows, talk shows and other entertainment programs your voters are routinely watching. Develop your strategy to get on those stations that your voters watch.

Newscasts

The nightly news is perhaps the single most powerful way to reach your voters. However, most TV stations will not be nearly as interested in your race as the rest of the media will be. But, don't stop trying. Know the news editors, reporters and anchorwomen and men. Frequently covered stories will include the candidate's announcement, one or two press conferences, attacks on you and your opponent and some campaign "color" stories as the election gets closer. If you are creating special events that have specific human interest, call the stations and advise them early and often.

Get your press conference advisory delivered to the TV newsroom a day in advance of the event and make sure you have the backdrop location of the event in the press advisory preceding the conference. Any press event you create should have the most visually interesting background possible. A candidate standing behind a podium in a local hotel is not dramatic action for the TV cameras. Suggest a location that has action attached to it: neighborhood parks, in front of the police station, at a day care center, in the middle of rush hour traffic, or even at the candidate's own breakfast table. Make sure you include specific maps on how to get to the press conference site if it is not a common location.

Most TV newscasts are scheduled for early evening (5 or 6 pm) and late evening (10 or 11 pm). In the large metropolitan areas, there may also be early morning or noon newscasts. Keep these media newscasts in mind as you set your schedule and always keep in mind which of those shows your target audience watches most often.

Candidate Interviews

Most stations will feature the candidate at least once during the campaign. It is important to have an agenda for these interviews, as well as a backdrop that shows the candidate in the best possible light. Always answer the questions but look for every opportunity to stress your main message.

Candidate Debates

The last week of every campaign, TV stations will want to offer a joint appearance between the candidates. These may vary from one-on-one debates to three-minute candidate statements. These forums probably do more to determine final swing voter opinions among the undecided voters than any other media forum. Your candidate must be extremely prepared for anything that might come up.

Most debate formats include an opening statement, questions from a panel of reporters or community representatives, perhaps a question from one candidate to another, and then a wrap-up statement. These forums require dedicated preparation days in advance of the TV taping:

- A week before the forum, review the format of the debate with the candidate so she begins to get familiar with the order and nature of the program (who will be there, who will be asking questions, how long each segment will be). Outline the topics likely to come up and settle on those themes and points she will want to make. Ask her what information she wants given to her before the event.
- Three days before the event, give her all the special research she has requested. Double check the format to make sure there are no changes or additions. Suggest, in written form, the beginning speech and the closing remarks. Allow her to review these for two days and see if she wants to make changes.
- The day before the event, schedule a two or three hour debate preparation period with the candidate, communications director and good advisors to go through some role playing of the questions that might come up. Work on answers the candidate feels comfortable using which tie back to the campaign theme.
- Schedule time the night before a debate for the candidate to memorize her opening and closing comments and let her recite them to the communications director the morning of the debate.
- **MOST IMPORTANT OF ALL:** allow the candidate to have a minimum of an hour of absolute quiet, time alone before the event to center her thoughts. Arrange for her to have her hair cut or trimmed and give her plenty of less stressful things to fill the day (if that's possible).
- If her voice is hoarse or uneven, have her drink some lemon juice and water just before the debate which will clear her throat and give her voice a wonderful boost.
- If the TV debate allows for a general audience or a participatory audience, make sure you have your supporters in the front rows. If the format allows for questions from the audience, coordinate which one of your supporters you want to ask a question. Make sure they do not have buttons or other campaign paraphernalia on them, as TV reporters will not want to have a question asked by someone blatantly in one specific camp.

Special Broadcast Tips

Know what the press is saying about your campaign, your candidate, the opposition, other races, community issues and fast-breaking news items. To accomplish this, you need to be the media's best subscribers. Get copies of the local and regional newspapers when they come out, not when you get home at night. Keep a radio station on during your work day to get the up-to-minute news (radio background noise also makes an office sound alive and busy, even if no one else is in it). And, at least the communications director should watch the early and late news on TV. Most campaigns borrow a portable TV (it doesn't have to be color) and keep it in the campaign headquarters. As the day gets very hectic around the news hours, the communications director might want to set an alarm clock to insure she watches the early nightly news.

Equal time requirements as outlined by the Federal Communications Commission (FCC), have instilled a sense of fair play in the broadcast media. In theory, the airwaves belong to the public, thus each radio and TV station should insure that everyone running for office has fair access to these air waves. If one candidate is asked to participate in a talk show, appear in a special feature or other non-news items, the opposing candidate should be eligible for equal treatment.

If your opponent receives what you believe to be favored treatment, you may want to talk to the TV or radio reporters directly. Do not call to demand equal time. Do not accuse them of being on the opponent's payroll. And, do not accuse the reporters of supporting your opponent because their station's management has told them to do so.

Have your facts in hand and go through the times, dates and subjects that have featured your opponent and simply ask that you receive similar consideration. If you cannot work the problem out with the reporter and her news editor, talk with the manager and work up the chain until you have exhausted all options. Never lose your temper. As difficult as it may be, the best way to turn an uncooperative press person around to being more favorable is to be positive, pleasant and concentrating on the future...not the past bad coverage.

Blogs

With the advent of e-mail and Internet access that closes the distance between readers and writers, there are opportunities to get your message to potential targeted voters much easier and cheaper. The phenomenon known as Blogs is coming of age in our campaign world. Blogs are Websites where writers are uncovering news and reporting on information the rest of the mainstream media may be forsaking. Sometimes mainstream media goes to them to get the latest information or story lead.

Blogs usually have updated information a few times a week and act as if they are paid subscription information to select people who know how to find them. In some cases, Blogs open up lines of communication for other people to add to the information presented.

Of course this information does not carry the guarantee of accuracy, and conjecture reigns supreme when no one is likely to sue for damages. However, the number of campaigns influenced by information fresh from Blog sources grows exponentially.

Changes in the media are changing the way we get and use information. Many people stay up late and read the newspapers online at midnight as soon as the papers post it on their Web sites. People who like to dig deeper than the information they read in the establishment press, create their own Blogs, which are then quoted by Talk Radio. Talk radio influences weekly newspaper columnists who are read avidly by most of the editorial board writers. The medium has truly become part of the message, and the rapid relay of information itself becomes something with which to contend.

Chapter 16

Negatives

Campaigns usually begin with positive issues, lots of upbeat speeches about accomplishments and high visions, and, of course, the promise not to go negative. However, as the campaign gets near the end, and too close to call, then early campaign season wishful thinking may go by the wayside. In fact, more than three-quarters of the campaigns in this country “go negative.” Why?

The Negatives Are Much More Interesting

We are far more apt to remember the negative story of a candidate’s drunken driving ticket, than to recount her five-point platform for economic development. It is human nature to remember the less than positive news. In the world of politics you need to give voters a reason to vote for you and fire the other candidate.

Campaigns that take on a negative air from the start are more obvious today because there is more money being spent to get those messages to us. While aggressive campaigns within one’s primary were seldom waged, they are now commonplace--giving the entire election cycle a sense of unending negative attacks. Actually, “negative” campaigns are as old as campaigns themselves.

All Is Hardly Fair In Love And War, And Politics

The community as a whole has taken up some quick fixes. Fair Campaign Acts, complete with their own symbols, are now commonplace and issued by good government groups such as the League of Women Voters. Newspaper and TV reporters are doing their “truth squad” examination of the negative ads. And, candidates themselves are resorting to new techniques. In the past several years there have been dozens of court suits filed by candidates who are seeking restitution for distortions and lies which appeared about them in the context of a campaign.

General consultants will tell you to never sign anything that will ultimately tie your hands in the campaign to follow. There isn’t a candidate around who hasn’t said, “I refuse to go negative.” Yet, those who sign innocent-looking pledges not to be aggressive and negative could easily be signing their own defeat notice.

Deciding To Go Negative

There are some general clues as to whether or not you will have to consider bringing out the less than positive facts about your opponent:

- If you are likely to be outspent by a lot, then to get the voters attention and interest, you will have to insure that they know the down side of voting for your opponent.
- If you are running against an incumbent, you have to present the reasons why he should be fired and you should be hired.
- If your opponent has a background of questionable but unreported activity and no one knows.
- If you have little name recognition and your opponent has lots of favorable recognition,
- If you get into the race late and the agenda is already controlled by your opponent.
- If you are given little chance of winning and thus get little or no serious consideration by the press, party leaders, the political insiders and others who help determine the early campaign dynamics.

Factors To Consider

In reviewing the nature of negatives, there are twelve points that you will want to consider before intensifying your campaign.

- First, do your opposition research. Know about your opponent--and yourself. Most candidates wrongly believe there is no reason to do opposition research on themselves as they have been forthcoming about themselves and know already what the worst that can be said. However, what a candidate recalls versus what the public record holds can be two very different things--and our recollection might not be the same as current public perception.
- Watch for clues as to the nature and style of the campaign. Your opponent will often reveal critical clues as to what will come next in the course of a campaign strategy. He might be baiting you on a point, trying to get you to deny something he will be saving for an end attack.
- See who is helping your opponent. Often there are detractors from your past who end up actively supporting your opponent. They might remember confrontations from the past differently than you.
- Understand what's important with the voters. Indiscretions from your past might not be as important as inconsistencies about issues you have discussed. The public is much more tolerant of negative attacks than it is forgiving dishonest reactions to charges. Be clear about how the negatives are likely to affect the people important in your campaign. Consider them before you launch or respond to an attack.
- How will the important people in the insider community react: your own party leaders, the community leaders, the endorsers?
- How will your targeted voters accept information about you that is negative--and how will they react to the nature of what you attack in your opponent?
- What about your donors? Negative attacks can dry up your money. Your reaction will be critical.
- Don't forget your volunteers. They need to be informed before the negatives hit as they are directly influenced by it.
- Check out your opponent. If he launches a strong slam on you, look beyond the attack to see what's prompting him to attack. When an opponent goes negative, the nature of the attack and your counter response may tell you much about his ability to campaign. Also, if you go negative first, then watch your opponent's resolve in handling the matter.
- Don't forget your opponent's donors. Sometimes when an opponent goes negative first, it gives him an added boost with his donors and more money comes in (something you might want to point out).
- Understanding that timing in campaigns can be everything. A negative attack launched months from Election Day might not be a big deal. On the other hand, if the campaign is tight, and the days are quickly waning, then it is likely that your attacks or responses will have added emphasis.
- Consider the next step. If you go negative, expect that you will be attacked back within hours. The response could be unfair, inaccurate and on an entirely different subject.

The goal of understanding your own weaknesses and those of your opponents is to be ready for anything. To go negative or to respond to it requires far more work in advance of the attack than after it happens. Forewarned is forearmed.

The Reaction When You Go Negative

Opponents never take attacks quietly. Even if you have proved your point, don't expect your opponent to respond logically. You probably wouldn't if you were in his shoes. Opponents whom you attack are likely:

- To pay for an opposition research company or even a private investigator to thoroughly investigate your history. Remember that even your family becomes fair game at this point, so warn the whole team that times might be tough for a while.

- To raise a lot of money with a message that more money will be necessary to defeat you especially since you have gone negative;
- To run to the press with any and all inconsistencies about you and your background, platform and record.
- To hit the airwaves to respond to the information. This may have the effect of making your opponent expend funds earlier than they anticipated. However, negatives tend to up the ante for both campaigns --the one launching the attack and the one responding to it.

Dangers Of Going Negative

Particularly in the case of women candidates, there are many reactions from friends and foes alike to your going negative.

- They may think you are too shrill or harsh
- They might begin a logical or illogical attack on you
- You may risk credibility with the voters, the press or your donors
- You might be the one blamed for negative campaigning
- The attack may hurt you with senior voters
- You might lose some volunteers over the attack
- Your own issues might fade and the attack-counter attack might be all that the voters hear up to Election Day
- You may tune out certain segments of your own targeted voters
- It may give voters a reason to question your own integrity if not done right with all the facts backed up

Kinds Of Negatives

Negatives come in all shapes, sizes, intensities and formats. In reviewing the more common campaign negatives used against, the following four reappear year after year:

Attacks based upon one incident in a candidate's life which showed her to be a hypocrite such as: moral indiscretions, bankruptcies, wasting money, not being what she said she was in her issue papers or biography.

Attacks based upon a show of public arrogance. Popular examples include junkets to Hawaii while important public services were being cut.

Attacks based upon taking one vote and blowing it out of proportion. If an incumbent voted for a budget which also included cuts for a senior program, in addition to cuts for every other budget item--the attack read, "She stabbed your grandmother in the back."

Attacks based upon absentees in office. Missing a critical vote, or missing several votes in proportion to others' attendance record, is a popular hit on incumbents.

Other Popular Negatives Include

- **Personal goofs:** the one personal indiscretion committed in the company of others who will be around to remember it, and even tell your opponent the colorful details. Everyone has that one night when you were young, innocent and foolish. Smoking marijuana, being in the company of heavier drugs, getting caught in the hot tub with no clothes, causing a disturbance at a rowdy party, drunken driving, and a host of other examples you're probably recalling as you read this.
- **Not paying attention** to life's important details: A bad divorce, income tax problems, personal credit problems, a bad academic record or a lack of a diploma are all examples.
- **Criminal problems:** In these days of easy access to computer files and the Internet, it's stupid not to inspect the police records of your opponent. Drunken driving, sexual

harassment, domestic violence, restraining orders, child support enforcement violations, and even parking tickets (if there are enough of them) can be attacks easy to document.

- **Professional dilemmas:** If your opponent has been fired for cause, had controversial clients, or exhibited questionable ethical behavior on the job, then these could be used against him.
- **Civics basics:** A candidate running for office who hasn't voted until just recent elections is a popular attack. Even the most civic-minded candidates seldom vote in all elections (such as special spring elections for local bonds and levies).
- **Guilt by association:** Any organization a candidate may have contributed to, been a member of, or simply attended its events may be an example of an affiliation which the public may find questionable. Membership in the National Rifle Association, a gay organization, a militant women's group, a right-wing religious group, a racist organization, and radical environment groups are all examples of what has been used in the past to link a candidate with an interest she may not have wanted on public record.
- **The exaggeration:** Putting the best face on an accomplishment, a job or situation can prove to be a candidate's undoing. Everyone has resumes that glamorize their past. Those details when repeated, exaggerated and then revealed by an objective investigator can prove devastating. They may prove your opponent to be a liar.
- **The past record** that seems hard to find: Background checks are easy to track, and they can prove damaging if what you find is an opponent who tries to look like the all-American kid when he might have had a dishonorable discharge from the military, couldn't keep a job, or been divorced several times. Chronic or serious health problems have also been used to taint an opponent's image, particularly if he has been claiming the opposite characteristics.

From judicial campaigns to the top of the ticket, expect to see new and more creative uses of negatives.

Tools For Launching An Attack

You have credible concerns about your opponent, and the back up information to make it stick. What will you do with it? Before you launch any attack on your opponent, make sure it won't turn on you. Consider:

- Do you have clear copies and documents to back up your charges?
- Do you have independent sources that will back you up?
- Can you prove you got the information legally and fairly?
- Are you sure that you are not guilty of the same charges you accuse your opponent of doing?
- Will this charge start a full scale negative campaign, and if so, is this charge strong enough and relevant to the voters to warrant the start of a negative volley?
- Will the press, the public and other interested parties pick up the attack and find it fair?
- Is this the right time to launch an attack? Four months before the primary will mean a story might fall off the news pages. However, a story within days of the election might not be believed, or just be considered politics as usual.
- Is it new? Rehashing old negatives won't get the voters rallied to your side. Campaigns frequently try rerunning old negatives against an incumbent, mostly to their own demise. Fresh material, please.
- Is the negative reasonably easy to understand? Volumes of information might be good for responding to attacks, but not so effective in trying to launch one.
- Can you draw conclusions which logically could predict your opponent's future actions in office? A candidate who was caught drinking beer in a park won't be suspected of

being a law breaker in office. A mistake often cannot be made into an atrocious character flaw.

- Can you paint your opponent as a hypocrite, as someone who's just not like "us" or somehow outside the value boundaries that most of the population holds as important?
- Would your target voters paint your opponent in the same light you have, given the same information?
- Can you attack your opponent and still get back to your message? Campaigns that lose sight of their own message as they begin the great attack often find that they lose their way as well.

Often campaigns get negative information about their opponent, call a reporter and try to "leak" it. But be warned, the disasters befalling a campaign are more numerous than are the successes in just releasing an attack.

Other Negative Tactics

- Whispering campaigns. If you have information that doesn't meet all the standards of fair campaigning, you may resort to what some call whispering campaigns. This much-despised strategy involves spreading off-the-record rumors with some small fabric of truth. It is spread on the fundraising circuit, where stories are dropped in the form of a question posing the negatives. "Have you heard that Sandy's campaign is out of money? Seems she finally had to start paying child support."
- Letters to the Editor. With a simple, willing signatory, lots of negative information can be spread in a few simple paragraphs, usually ending with some pointed question to the readers. Though some newspapers refuse to print such attacks, most will take the letters if they receive letters from your opponent with their own charges against you.
- Questions at Joint Appearances. Either candidates or their supporters can ask questions of the opponent at joint speaking engagements. Asking the embarrassing question is usually translated by the crowd as self-serving and can backfire. However, if the question is fair game, it might attract the press and begin a longer unraveling attack.
- Confronting your opponent or meeting with him early in the campaign. If you are concerned about damaging personal information coming out about you, and have the goods on your opponent, there is a campaign school of thought that offers the meeting approach as a strategy. However, letting your opponent know what you have on him is like giving him an invitation to preempt you with it. And, dealing with each other and cutting deals behind closed doors is likely to be discovered, or even leaked by your opponent.

The Worst That Could Happen

There are no guarantees about going negative. There are only war stories about the ones that succeeded and those that fell flat. The effective ones are usually those released to one reporter who can help do the research that uncovers the problem. Candidates who leak a little of the problem out, and then continue to intensify the information as the campaign proceeds, also report success. Still others report that they had to persist in talking with reporters for weeks before the story finally took hold.

One good piece of advice from those whose research fell short--know the opposition research that moves the most voters by covering all the possible attacks you might launch. If the voters think you've got a serious charge, then it's likely the press and everyone else will also. Unfortunately, opposition research that reveals the juiciest information usually comes in late to the campaign, after all the polling has been done.

Consider having the most critical information, about you and your opponent, on that first poll to know what you will go to bat for and insist it gets out before other information that might be nice to get out.

Turning The Tables : What Happens When Your Opponent Hits You

The entire world of "spin" (the ability to define a situation in its best possible terms and conditions) developed as a result of the onslaught of negatives. To prepare for whatever awaits you on the stump, prepare yourself for attacks – especially if you are an incumbent, have lots of money or name recognition, or if you are considered the candidate to beat.

There's an old campaign quiz that goes like this: True or false: In today's campaigns, 90 percent of the candidates will be hit with a negative attack. The answer: False. One hundred percent of the candidates will be hit with a negative attack.

And with the advent of the Internet, there are even more ways that negatives can be spread about you with truth not even being part of the consideration for sending them. Most candidates lose valuable time and energy by taking attacks personally and then trying to get to the bottom of how the information got out.

Your goal should be to anticipate any and all attacks, regardless of whether or not they are true. Most women fear attacks such as accusations of personal bad conduct, however, the public takes a dim view of personal attacks. The days of being vilified because you are divorced, had a bad credit rating or have a child with drug problems are gone and good riddance.

The most serious negatives used against women are those that take away a woman's momentum and her credibility:

She isn't ready yet

She can't cut the deals that he can cut in bringing home the bacon

She can't win

The Candidate's Presence

Even if you're going crazy and the worst lies imaginable are being said about you, you must remain the picture of Hemingway's definition of courage: grace under pressure. You will be judged by the public and press based upon:

- your ability to keep control of your campaign
- your look of confidence
- your willingness to accept responsibility for what's gone wrong
- your ability to resume a normal campaign schedule
- your calm and considerate demeanor

Controlling The Backdrop

Be camera-ready and camera-tested. Get that video camera team up and running. See yourself in front of the lights as you discuss the worst possible twists and turns that a negative could take.

Watch for backdrops that compliment or contradict you. Have supporters, family members or community leaders surrounding you if the situation warrants it.

Remember your target. Remember your earlier polling. Remember your message. The three most important components of any campaign strategy are usually the last things on your mind as the negative attacks begin. However, it is precisely at this time when these three aspects of your campaign matter most and should be foremost on your mind.

Be brief when you are dealing with attacks. Campaign folklore is filled with well-intended candidates who kept talking and talking at the press conference that was supposed to have answered all the critical questions. Instead, the candidate's long-winded answers and monologue ended up provoking more questions.

Allow the public to see you being human, but not victimized, weak or defeated. You will be judged on your ability to pick yourself back up and get back on track.

Negative Attacks

Once you have been the subject of a negative attack, you never forget it. In fact, the fear of negative attacks has prevented many candidates from stepping up to the challenge of running for office. Once hit, you must respond quickly, or it can totally incapacitate your campaign and stop the natural momentum that your candidate was building. The first step in handling negative attacks is to expect them.

How To Inoculate Yourself Against Negative Attacks

- **Know your own soft spots, politically, personally and professionally.** Your own opposition research about your competitors has revealed much about them; now spend as much energy researching your own background.
- When people inquire of former employers, who will say unfavorable things about you?
- Have you belonged to organizations which have taken controversial stands?
- How will your personal conduct play into the campaign?
- Know the answers and how you will respond to the less than perfect moments of your past.
- **Expect that your public record will be the first area of scrutiny.** If you voted for a measure that resulted in one tax being increased, expect to be blasted for raising all taxes. If you voted against an important special interest group's funding (even if it was for a procedural reason such as you wanted a stronger funding bill) expect to be labeled an enemy of that group. If you missed votes because your children were in the hospital, expect to be charged with neglecting your job. Find all the possible exaggerations that could be aimed at you and be ready to respond with the truth, with credible people who will explain your vote and with "the rest of the story" which was deleted from the attack.
- **Meet with your opponent and ask him to limit the campaign to the fair scrutiny of the public record.** If you look your opponent in the eye and ask for a clean campaign, he is likely to agree. Then, before he goes ahead and produces negative ads, he might think twice. If he doesn't, you can always yell unfair and reveal that he broke his promise to keep the campaign clean.
- **If there is a great likelihood that something major will be used against you, consider releasing the information yourself.** Be very sure that the negative is about to be released (have advance notice that a TV attack ad is debuting within a day or know that a press conference is about to be held) and release it first. In this manner, you can explain the situation from a less defensive posture and perhaps defuse the negative sting before your opponent blows the negative accusations out of proportion.
- **Watch out for inconsistencies in your voting record** and your press releases, platform and speeches. More negative attacks come from a candidate's own evidence. If you have voted one way in the past and are proposing something different now, explain it in the speech or platform paper. The clarification which acknowledges the inconsistency may neutralize the problem for the future.
- Inform your communications director of your weaknesses long before she reads them in the paper.

How To Handle The Attack

- **Get all the information about the attack:** a copy of the radio or television ad which should be immediately transcribed; an eyewitness account or a tape recording of your opponent's press conference attacking you. Find out how the negative ad or press release is being distributed and who is using the material. Find out the extent of the time buy for the TV ads that are running. The communications director and volunteer coordinator should have all the important targeted media surveyed to sense how far the attack is spreading.

- **Have your manager and research team suggest all the possible responses** which might be used with the press. If you have considered possible responses to other attacks, some will probably be applicable to all attacks. The candidate who customarily launches the first negative attack is the one behind in the polls and can be charged with using desperation tactics.
- Your candidate will want to seek counsel from a few members of the kitchen cabinet, her media consultant and her manager. **Have the home numbers and travel schedules of all these important people close at hand.**
- **Keep the wringing of hands to a minimum of time.** Negative attacks need to be responded to immediately. Responses are usually made in the same medium in which they were launched. For example, if a negative mail piece arrives, you should respond with a new mail piece ASAP. If there isn't enough time to get a bulk mail piece out before the election, then consider a radio ad. Radio and TV attacks should be responded to on the same stations that aired the attacks.

Responding To The Attack

- **Establish the story or issue in your terms**, clarify the facts that might have been misinterpreted or respond to the points in contention. If there is a problem or a point about your past that is true, however unfortunate, do not lie about it nor paint a false face on it. In most situations, the negative attack is not nearly as damaging to the candidate as the way the candidate deals with the attack. Remember, the public is watching how you will deal with stress, bad news, attacks and surprise information.
- **Confess it before the press discovers it**, if there is more negative information to be revealed. A traditional ploy of opposition research teams is to only reveal a tip of the iceberg of negative information about your candidate. Then, as you fumble for a response, the press discovers much more important "dirt" and gets vested in the story by merit of what they have researched, allegedly on their own. The only way to stop this is to reveal the rest of the story yourself.
- **Have someone highly credible go to bat for you.** In cases where attacks have been personal...such as attacks on a person's morality, personal judgment or behavior...a personal endorsement from a spouse, parent, mentor or child will go far in neutralizing the attack if the response is emotional and credible.
- **Admit you were wrong.** Explain you are human and have made a mistake. Who in life has not? Outline how the problem that created the negative ad came about and make it into a personal yarn. Honestly look into the camera and ask the public not to hold you to standards they wouldn't uphold themselves.
- **Attack the attack.** Instead of dealing with the merits and substance of the attack, go directly to the tactics and messenger. Label your opponent as having gone negative first when you were hoping the campaign could be a fair, honest and clean one. Note that the public deserves better and that everyone knows the negative attack was a bunch of exaggerated gibberish.
- **Bait and switch.** As you respond to the direct attack on you, launch a negative attack on your opponent. The object here is to point out that your indiscretion, mistake or bad vote, as outlined by your opponent, is not nearly as bad a public policy problem as something your opponent has done recently. This "okay, you want to take off the gloves, let's do it right now and really talk about bad votes," shows the candidate as strong and able to withstand attacks. But it is critical to have all your charges substantiated before you begin your attack.
- **Respond with humor.** By cleverly dismissing the attack, you give it less credibility and life. Some candidates are well-suited for humor, as it is part of their style. If it is easy for you to use, consider it. If not, work out a clever retort that might work for the occasion. Some media advisors are now responding to negative ads with cartoons and caricatures.

Rules In Dealing With The Press

Before you and your campaign develop a strategy plan for dealing with the media, it is important to understand all the implications of working with the press. There are a few general rules:

- **Always tell the truth:** even if it hurts, and even if it will mean more negative press. It is far more important to keep a highly credible rapport with the press than it is to mislead them with little white lies they may find out later.
- **Know the deadlines** of all reporters who are critical to the campaign; know their direct telephone numbers (so you can call after work hours) and their home numbers. If you receive a message from a reporter, call her or him back as soon as you can.
- **Never call a reporter when you are angry**, particularly when you are angry at him or her. It is important to remember that reporters are human and will consciously or subconsciously view your comments in a defensive manner. It is fatal to attack the press.
- **Treat all reporters fairly** and do not continually steer your press comments and press conferences to one reporter's deadline. Reporters are very competitive and will be less cooperative if you are always playing favorites with their competition.
- **Answer questions as directly as you can.** Though others may suggest you only answer a question in a way that repeats your theme, give the reporters as direct an answer as you can. If you don't know an answer, don't fake it. Explain you haven't got the answer now, but you'll have it by tomorrow morning.
- **Do your homework and research early and often.** Know what your opponent has done and what sets you apart from him. You need to have your uniqueness ready to repeat to the press at each opportunity.
- **Stay current.** Remember that the election is not the only news that is being covered. Most people are spending far more time reading about crime, social and civic problems, sports news and special interest features. Of particular importance are the other stories which political reporters are writing about. If you expect them to keep up with all that you are doing, it at least seems fair that you be able to comment to them about other stories they should have written.
- **Keep appointments with the press and be on time.** Try to be direct and honest with the press and limit the propaganda. They are paid to know the real people and expose the phonies.

What Not To Do When The Attack Hits

Don't fall into common traps:

- Don't be caught out of action and unavailable for comment
- Don't be seen behind closed doors sequestered with political advisors and consultants
- Don't be weak or make the facts fuzzy beyond reasonable explanation
- Don't stonewall or stubbornly insist you were in the right when the facts certainly give a different perception to most observers
- Don't justify yourself by going on and on and on. If you keep throwing excuses at the public in search of one that will actually catch on, it's likely to look as if you are trying to convince yourself as well as the public
- Don't get caught in a snowball that could end up as an avalanche on you. One negative that you don't address can easily turn into a campaign disaster, as details leak out daily so that you never get back to your agenda. Take charge before you are overwhelmed by charges that take on a life of their own.
- Don't blame others. Even if you weren't responsible for the problem, take responsibility. Voters appreciate candidates who take the bad with the good.

Getting On With The Campaign

Now that the first wave of the negative attack has passed, it is time to seize the agenda and take it back into your corner. It is often true that she who dictates the public debate, controls the agenda and she who controls the agenda also controls the outcome of the election. Handle the attack in whatever way you determine best. Then get back to campaign business and put it behind you. If a reporter seems determined to continue the negative attack debate, refuse to continue to answer his question. If there is nothing new to say or add, state you have answered the question before and intend to say nothing more about the matter. Move on to the next subject and maintain this demeanor until the subject gets back to one that is positive and gives you a fighting chance.

Negative attacks are not new. They have been going on since campaigns began. However, with the increasing number of television ads where the public is forced to see numerous ads back-to-back, the negative ads seem domineering.

The best advice is to be prepared, stay honest and accessible, answer the attack immediately with your best shot and get back to your message and agenda.

Ethical Considerations In Today's Campaigns

Fifteen years ago, candidates used to hire consultants with the proviso that they never ask to do negative ads. Today, the candidates review the "hit pieces" of their prospective consultants to see whether they are tough enough to beat the opponent's negative ads.

Negative ads are equated with ethics in today's campaign. Often we think of a candidate with strong ethical values as someone who runs a "clean" campaign – one where the candidate sports positive brochures and TV spots about herself. Candidates take chances when they attack their opponents based on personal allegations. Attacking your opponent for personal indiscretions or for her children's drug use – these would likely drive voters away from the candidate launching the attack.

Like the cat stuck in the tree rescued by the firefighters, positive news, while it might make you feel good, it is not riveting enough to catch most people's attention. Negatives are usually a more interesting subject than your résumé or a fifteen point plan for economic recovery.

However, the public has grown more critical and discerning about negative campaigning. When it is asked about negative ads, the public is clear in stating it wants higher campaign ethics.

The Institute for Global Ethics bipartisan survey conducted by Lake, Snell, Perry & Associates, Inc. and Deardourff/The Media Company asked voters about their attitudes concerning candidates and campaign.

86 percent believe unfair attack campaigning is unethical

81 percent believe attack-oriented campaigning is undermining and damaging our democracy

76 percent think negative campaigning produces less ethical and trustworthy leaders

82 percent think this type of campaigning makes people less likely to vote

88 percent think candidates should agree not to make any personal attacks

Studies show that unethical campaign techniques run a significant risk of backfiring against the candidate that uses them. What are the attacks that swing voters to the candidate's side? And what are the negatives that drive voters away from the candidate who launched the attack?

Negatives that don't work include personal attacks: attacks against your children or family, attacks involving personal choices, attacks that are mean-spirited. Our voters today are among the most educated in the world: they are not easily fooled by far-fetched allegations and stories.

Negatives that do work include attacks on public votes you have taken, inaccuracies on your resume, attacks on the people and organizations who endorse you, and attacks on your positions which are not main stream for your district.

The media has developed its own checks and balances on negative campaign ads. It has checked on the accuracy of the ads, and whether the information was taken out of context or used fairly. Commonly called “Truth Squad” reports, these programs concentrate on improving the ethical campaign standards.

Also, civic groups are concentrating on improving ethical campaign standards by programs that seek to have candidates pledge not to use personal attack or untruthful ads. They are hoping to raise the issue in the hope that messages that denigrate government and those which denigrate people in government won’t be successful. Conversely, they seek to support and commend campaign strategies that engage the public in meaningful debate and dialogue about community issues. These activities include precinct walking, debates and town hall meetings, campaigning that educates the community about the issues of the day.

Ethical campaigning has come to mean more than candidate conduct. Some believe that truly ethical campaign strategies separate themselves from such things as third party mailings and supporter communications (including “whispering campaigns”). Ethical campaigners surround themselves with like-minded individuals who are vigorous about what kinds of conduct they do and do not approve.

Half of the battle is creating an environment in which ethical campaigning is expected. Ways to accomplish this include a series of candidate forums in which the goal of an ethical campaign is discussed and then follow-up conversations about whether the candidates did indeed walk the talk. The community and media can also be constructively engaged in holding candidates accountable for abiding by their commitment to conduct ethical campaigns.

The Institute for Global Ethics, Project on Campaign Conduct reports interesting polling data relating to campaign ethics, a showcase for the project’s work in negotiating voluntary campaign codes of conduct in races. You can find them online at: <www.instituteforethicalconduct.com> and the project’s Clean Campaigns: How to Promote Candidate Codes of Conduct.

Ethical Dilemmas On The Campaign Trail

What if your campaign were “leaked” a copy of your opponent’s campaign plan? Would you read it, would you give it to the press, or would you give it back?

What would you do if the largest strip club in town (requesting an expansion of its establishment) contributed the maximum contribution to your campaign? Would you give the money back? What about the largest technology business in town which also was requesting a city zoning change? Would you take their money?

Suppose your opponent who is African American just moved into your affluent, white neighborhood. Your consultant offers a direct mail piece showing a moving van moving him into the area, stating “Guess who’s just moved into the neighborhood.” Would you approve it? What if the NAACP threatened to call you a racist?

If you pay someone under the table to work for your campaign, it would be against the law if not reported. However, if you give campaign workers free room and board at your house, is that reportable? What about those lavish dinners with prospective high donors that you pay for, are they reportable?

These are ethical dilemmas faced by women candidates all over America. How do you decide your moral compass?

The best arguments for pushing the limits of ethical behavior or standing firm can be summed up in many ways. When faced with the dilemmas above, women have reacted as follows:

Why I should not do it ...

“It will haunt me; I will always think about it and feel bad every time I do.”

“My family and friends will know; I will see it in their eyes.”

“It’s a slippery slope: one small breach here and there and before you know it, there is nothing you wouldn’t do.”

“I’m supposed to be a model for others.”

“It will break the natural bonds I have with the voters who think because I am a woman I should be above all this.”

“I could get caught and land in the newspapers.”

“I’d be no better than the people I criticize.”

Why I should do it ...

“You’ve got to choose your battles, and this one is not one I want to choose just for the sake of some small ethical considerations.”

“I want to win; and if this will help, I will hold my nose and go for it.”

“It would be best to address this after I am elected; do it now, work to change it later.”

“Everybody does it.”

“I’ll say I was confused; I’m a new candidate and in retrospect I’m sorry I did it.”

“I’ll blame someone else--like my campaign consultant--if I get caught.”

“I’ll hope that no one will find out and take my lumps if it does get out.”

“No man would ever think twice about doing this. I’m running against a man.”

When asked what advice women elected officials would have in responding to an ethical dilemma, these are some responses:

“I ask myself, what would my mother say?”

“What would this do to the campaign if it made the front page of the newspaper?”

“If I read this about my opponent, what would I think?”

“I think about the ethical dilemma, and then I write down my thoughts then sleep on a decision.”

“I discuss my dilemma with someone outside party politics, then with my consulting team, manager and key advisers.”

“I pretend it’s two days later; then two years later and wonder what the reaction has been.”

Ethical dilemmas usually involve a choice between doing something that makes you feel compromised versus something you think you should do to better your chances of winning. There are no uniform rights or wrongs; how you feel is based upon your values.

Doing something illegal carries little moral choice: if you do it, get caught and get fined, your campaign can be toast.

However, if it’s something you don’t like to do but think you may not win if you don’t, that’s your ethical dilemma.

Today’s political climate, however, has upped the ante for those who want to delve into negative campaigning, inaccurate whispering campaigns and third party attacks. The public and press are increasing their scrutiny and making sure the sources of these attacks are known. Some editorial boards are making endorsement decisions based on campaign attacks that are fair and reasonable--not unfair nor personal.

Your job is determine what you need to win, what is fair to use, what alternatives you have, and what the community will think about your choices.

Just as personal ethics are for you to decide, use of negatives is a decision you need to make in consideration of the consequences.

Chapter 17

THE FINAL PUSH

The last thirty days before Election Day can test the very fiber of the body and soul of both the candidate and the campaign manager. You find yourself waking up in the middle of the night and wondering what's going on, what is it that people are thinking out there and what does it all mean.

For the campaign manager, it's a recurring nightmare. At 4 a.m.: cold sweat, stomach in knots, eyes wide open, fear all over the place, no chance of sleep.....What seems to be the problem?

The opposing campaign dropped off new radio spots last night; you have no idea what they will say, but you are convinced it will be a negative blitz;

Your phone bank supervisor has just fallen in love with your scheduler and they're taking off for the weekend;

You can't remember who has the helium tank for tomorrow's 7a.m. breakfast and you promised you'd supply the balloons;

The telephone company is turning off the phones at the end of the day unless they get \$1,000 which you don't have and don't know where to get;

Your computer data base is totally fouled up and the person who devised the system is on vacation in Hawaii;

All of the above.

Planning For A Crisis

No wonder you can't sleep! Welcome to the world of crisis management... the definition of the last month of your campaign. There are dozens of decisions you must make every day to survive the last push of this madness they call a campaign. To the extent you can stop, think and attempt to prioritize these decisions, you need to guide the campaign through these troubled waters with minimum trauma.

The world of campaigns and the work leading to election night champagne can hardly be called a science. However, rational processes and good planning can put you in good shape if you take the time NOW to prepare for the crises that will surely follow. You have had months to build a strong structure, get those office policies down pat, figure out the message and understand your budget. You cannot just pray for the good breaks; you have to make your own good luck happen.

Now, without the luxury of a test run, you have to put the entire team and strategy on the line for its final, and only performance... the countdown of the last thirty days.

A quick assessment is in order. First, how good is your team? Do you have a razor sharp response system in place to handle press inquiries? Is your scheduler tough enough to say "NO" to your field coordinators demanding more of the candidate's time? Does your treasurer have a sense of the cash flow... and what can be cut... just in case? Can your field director motivate volunteers (who haven't slept for days) to go out into the street for needed door-to-door canvassing? Be brutal in asking and answering these questions.

Check Out Your Team

Are your key players up for the final push? Ask them. Now more than ever you will need weekly staff meetings, if for no other reason than to let each player know what is going on around them and to specify tasks. Though you may think there is a clear chain of command

about how decisions are made, it is a good idea to have a chart of who reports to whom so latecomers to the campaign can see for themselves where key decisions are made.

Don't be afraid to bring in new talent. In most campaigns, strong, operational managers can be yours for the asking. Ask a member of your finance or steering committee to take some leave time and donate thirty days to the campaign. A deputy in charge of day-to-day operations (translation: the detail department), could easily be the difference between missing important deadlines and winning.

Stress may be a six letter word but it has all the impact of a four letter one. Make sure everyone knows the top work priorities of the day, and insure that people charged with the authority to get things done have the commitment of the people working with them. To help build a strong team, plan some casual time for people to relax together. A Friday, 5 p.m. reception where people can unwind and share some of the humorous experiences of the campaign may be just what the campaign doctor ordered. Also, make sure that there is time for the candidate to thank the hard-working crew as the 11th hour approaches. A reception, brown bag luncheon, or just a few well-placed phone calls can do wonders for the team.

Check Your Supplies

Know what you have and do not have. Stash a few supplies in the trunk of a car that only you have the keys to open. Do not panic at dwindling supplies and do not succumb to screaming field coordinators who insist on 100 more costly yard signs. Give your supplies a good inventory and know how backed up your printer/suppliers are with other orders.

As the days dwindle to the first Tuesday in November, it's likely you won't be able to get new supplies even if you could afford the money to buy them. Look for the cheaper ways to produce last minute flyers, instead of more costly brochures. With all the new desk top publishing programs on the market, substitute creativity and rapid production for standardization of every product.

Check Your Budget

What was a guesstimate in April, and an estimate in July, is now a payment due in October. Where is your money going and what is the breaking point? Know where you can cut to make up for those increasing media costs and the telephone bill. Get out your budget and spend a few hours on Sunday night building a responsible budget from now to the end of the campaign. Instead of looking at all those neat little columns of numbers apportioned for each month, look at what it will take to pay for media, office expense survival, your Get-Out-The-Vote effort, critical salary commitments, and, if you can afford it, paid tracking polls.

Figure out what kind of money you need to have to get the most important work done. Do not avoid bill collectors. Talk to them the same day they call. Be honest enough to get them through these last thirty days with you.

Check Up On The Revenues

How far off are your projections? Is it time to call all your heavy-hitters into a room and tell them they all need to take to the phones two hours a day to reach high donors? Is the candidate on the phone making the calls she said she would make? Should you sit in on some of those phone calls to make them go faster and more efficiently? What about last minute loans... are they a possibility?

How Is The Candidate Doing?

Check the candidate's blood pressure and sense of well being. Is she sleeping enough? When was the last time she had something healthy to eat (even an apple will do)? Watch for blank stares and that telltale nodding of the head which may look to others that the candidate is listening but you know she isn't hearing a word. Watch those nasty details that every campaign usually drops, but the candidate may consider a pet peeve. Each person on the staff should consider what each could do to make the candidate's life a little easier. Talk about those sore

spots that drive the candidate crazy when they don't get done on time or exactly as the candidate likes it.

This is also a good time to check in on the candidate's family. An unwatched family that has not been kept well-informed or well used can explode into a major time and energy drain you can ill afford. Ask key family members how they see things are going and what problems they consider most serious. You may not agree nor want to hear what they say, but you can bet the candidate hears it each night, every night. Do a little public relations with the family on your own.

Not being able to locate the helium tank, running out of yard signs, missing a scheduled event because you didn't have the right directions, and not getting a particular newspaper endorsement are not crises in themselves. However if all this bad news comes on one day, the net sum is likely to position you to make bad decisions that could throw you into a crisis mode. It's hard to be upbeat when they're turning off the light in your office or the city is taking down your yard signs which were illegally placed in the right-of-way, but it is important that you isolate each bad situation and keep the campaign in perspective. Details that get dropped or bad news that comes in three's can effect the entire campaign machine and prompt you to work on individual, less important problems than the big picture. Step back and listen to what is going on in your own shop.

Are you dealing with tasks that others should be handling? Are you so absorbed with details that you can't see that the canvassing team is way behind schedule? Are you worrying about paying the bill for the printing next week when there is no money for the radio buys this week?

How do you recognize a true crisis coming your way? Crises seldom announce themselves nor do they appear in your July version of the written campaign plan. Crises are events, actions or inactions, that can prevent the voters from getting your message in these last dwindling days; or crises are messages put out against your candidate that result in the voters getting a bad message. In these days of the burgeoning negative campaign business, crises usually can be expected in the form of an opponents' late paid media that is a direct hit on your candidate. If the race is tight or you are ahead, you can expect a direct hit. And, if you haven't budgeted for paid media to counter that hit, you are in a crisis you may not get through.

There is not a lot of institutional history you can read to prepare you for all the crises that will come your way, but some standards in the business can help you.

Expect you will not have enough money to pay for all the media you need (keep some last minute sources you can resolicit; make sure you know how to reach your highest donors.)

Expect 50 phone calls a day to the candidate and manager (train others now to be able to take those calls and turn them around in 24 hours).

Expect scores of decisions to line up at your door (get used to prioritizing the ones you have to think about and either delegate the rest or wait until you have time to deal with them; don't be afraid to delegate).

Expect personality conflicts in the office that you will have to mediate. Address these problems directly and only once (take warring parties out of the office, let them air the problems, decide what to do and get on with the campaign).

Expect the candidate will say something wrong at the worst moment of the campaign (keep your press list with home numbers of reporters in your car and don't be afraid to use it).

Expect that your best workers will let you down (give them permission to make a few mistakes and help them back onto the road of good performance ASAP).

And of course, expect that the press will write the inaccurate, bad news story on the exact day when it will hurt the most.

“Managing” The Press

If you have done your homework with key political reporters and they have a good working rapport with your press secretary, you can protect yourself from heinous errors getting in the press. However, the most frequent faux pas happens when a reporter calls to ask about a subject that is critical of the candidate and the official response is not well thought out or delayed past a deadline where misinterpretations take place.

Now is the time for all good press secretaries to come to the aid of their candidate: sit down and agree now on the answers to any sticky questions. Remember, it is not your job to answer the questions asked by reporters. Your job is to deliver your message. Spend a couple of hours talking out what could take place in the final days of the campaign and what questions could confront the campaign. Write them out and write out the responses. Nothing so endangers the mandatory good relations between a candidate and a press secretary than a bad quote in the morning newspaper.

The Crisis Has Arrived- Now How Do You Get Out Of It?

Have the systems in place to deal with crises. Most inner circle staff, candidate family members, and key volunteers are too close to the action to be objective. If your campaign is large enough to have a consultant, this is the time to call her. Make sure you know where your consultant, pollster and media professionals can be reached. With the days dwindling to Election Day, busy professional consultants are globe-trotting; the smart campaign has the steering committee to actually do real work. Most steering committees have various roles and responsibilities, but it is now when they may be serving their first critical purpose. Be careful not to frame problems for your steering committee in a way that will heighten the severity of the crisis.

Bring your steering committee together for the given purpose of handling the crisis. But make sure you want their opinion. If the crisis involves responding to negative TV ads, then frame the agenda for a meeting to include possible solutions. Have budget documents, research files and key information at your fingertips for these meetings. Concur on the problem and how deep the crisis is effecting your message delivery; then plot what you have to do to respond, who is doing what and by when each action needs to take place. Give your steering committee a chance to discuss the problem and be part of the solution, but make sure everyone is reading from the same script. And remember... the Steering committee gives advice, you make the final decisions.

No matter how traumatic the crisis, the greatest danger is in overreacting. If there is a late-breaking paid media ad or a press story that slams your candidate, seek to control the debate and get ahead of the problem. Conventional wisdom often dictates that you respond immediately, accurately and directly in the same medium that the charge was issued. Have a good response ready (hopefully there is one), and then get back to your message and saturate the market with your own plan. Charges followed by counter charges followed by more charges can confuse a fragile undecided voter even more. If your race is tight, get back on course and run from the position you have chosen from day one.

Clues For Handling The Crisis

- **Trust your instincts:** if a problem arises and you know it will be a crisis for the campaign, swing into gear immediately. Take control of the problem and contain it.
- **Quickly and honestly outline the problem** and get the facts surrounding the affair. Grab your best, most-trusted people and get all the information germane to the problem.
- **Clear your desk and mind of other problems;** delegate the day-to-day operations to your second-in-command. Determine who needs to be brought into the circle to discuss the problem. Propose the options and strategy for reacting to it.
- **Test your suggested plan of action** out on a few people outside the inner circle of the campaign. There is no time for a focus group, but get some objective opinions.

- **Tell the truth.** Do not plan a response to the crisis that can backfire more negatively than the initial crisis. In most situations, your reaction is likely to be more critical than the initial problem. Lying, hedging the facts, avoiding the situation and reporters, or otherwise appearing gutless and cowardly will have more of a negative impact on the voters than the initial crisis. Also, overreacting can needlessly bring more spot light on a problem. A good rule of thumb is to remember it isn't the action, rather the reaction that will be judged by the voters when they go to the polls.
- **Take your lumps all at once.** Do not let the details dribble out. Explain all the details, even some of the painful ones that might not be out in the open as yet. Nothing increases the chances for a continuing story of bad news than details that get "discovered" by the press. Reduce your chances of the "smoking gun" story by confessing to it. Besides, when you release the story, you stand a better chance of putting a good spin on it than a reporter.
- **Do not dwell on it.** Once you have responded to an incident, let it go and get back to the agenda of your own campaign.

Turning A Crisis Around

Look for any opportunities that could be buried in a crisis. If there is an angle that is positive, play to the positive. If there is a way you can show grace under pressure, or even a sense of humor: do so. In many cases, the public will be able to accept your handling of the matter if they can identify with your manner. In some cases, candidates have been able to show they are worthy of the job by being able to admit they were fallible and subject to error like the rest of the public.

Never make the press the enemy. Even if there are reporters who have misread the facts or over-dramatized the situation, do not go on a rampage against the press. You need not believe they are only doing their job, but you must not take the situation as a personal vendetta against the reporter, the newspaper or other press entities.

Keeping The Team Under Control

The campaign is a metaphor for the candidate; how people work together, how the strategy unfolds, how efficient the day-to-day operations are, how accessible the key players are: all of these indications of a campaign's organization reflect directly on the candidate. In most cases, campaigns evolve to reflect the style, values and personality of the candidate. A campaign efficient on details but missing a main message to voters, probably has a candidate who still refuses to delegate little tasks and also has a tough time articulating why she wants to be elected.

In the same vein, it is important for every campaign manager to insist upon a team that has high moral standards. The team should be a proud reflection of the best of the candidate. Clear standards should be articulated once to all key personnel who will be in direct communication with those who join the campaign later. Staffers and volunteers need to know that when they are in public and have campaign buttons, bumper stickers or other signs identifying them with being from the campaign, they need to be on their best behavior. Although opening up a bottle of wine or some beer after a large mailing is considered a friendly courtesy to the weary troops, be sure that no one under the legal age is drinking the alcohol. Drinking should be kept to a minimum and those with a drinking problem should be helped to seek counseling. Of course, no drug use should be tolerated.

Workers need to do their best to steer away from any situations that could reflect poorly on the campaign. For instance, if a member of the public should give a volunteer a bad time about the candidate, the volunteer should not pick a fight, get abusive or otherwise provoke that person any further.

In every campaign, there are personal situations that arise which require caring management. Campaigns tend to draw people who are looking for excitement, looking for something to take their minds off other problems or looking to change their lifestyle. These people may end up being your best workers and most loyal campaigners. However, it is important to instill a sense of integrity in the work plan.

Campaign lore is filled with stories of marriages breaking up due to a sordid affair taking place during the course of an election cycle. Some campaigns feel it is proper to restrict personal relationships between key staffers and volunteers. As the campaign grows more intense, it will be critical that key players in decision-making roles make good choices on strategy and courses of action based upon the facts and not personal relationships. In many ways, a campaign is no different than a small business.

How To Fire A Volunteer

As the campaign draws near the finish line, there is always an infusion of more volunteers. That's the good news. Bad news comes when you have a volunteer who is causing serious problems for the campaign. How do you fire a volunteer? With deliberate caution!

If a person is causing a disruption, being too independent and thus detracting from you goals, or turning away other volunteers, it may be time to take action. Be clear with your workers: if something is bothering you about a person's behavior or work product, take the time to explain that there is a problem and offer solutions. Give the volunteer an opportunity to change direction or even change his or her position. Volunteers who try hard but just seem to miss the target all the time, need to be redirected to work they can do, and do well. If redirection, changing the job position and clarifying problems do not result in better conditions, then you may need to restrict the hours that the volunteer will be in the office so that you can be there to supervise performance. Try isolating the problematic volunteer by giving them a special project that allows them little interaction with the rest of the group. Do not "fire" the volunteer in front of other volunteers.

The campaign should be run as professionally as possible. It will indeed, have more consideration for its voluntary members than a small business might have for its employees, but it should reflect professional standards. The campaign should not be another "Peyton Place" nor should it run as a daily soap opera where people's personal lives dominate either the conversation or the central concerns of the body politic working the campaign. If there are people with personal problems that want to share their dilemmas with anyone at hand including the candidate and campaign manager, limit the time and level to which you can devote energy to being a good listener or advisor.

Simply put, campaign staff personnel do not have the time to be daily counselors. Be concerned, but offer to meet with people who want to discuss problems outside the office. If you can limit the time to after work late in the evening or before the troops get to work in the morning, you might be able to cut down on the amount of time dedicated to manager-counseling.

How To Cut The Budget

If your crisis involves having no money for key media buys, you are not alone. This, however, may be of little consolation in the face of a last minute \$50,000 TV buy from your opponent. Organize now where that last minute money can come from. No crisis is more critical than no money. A week before election is no time to discover this axiom. Pull your high donor list out, check on your candidate's family ties, and don't forget your own mother.

Money is critical to raising more money; never allow yourself to stop raising it. No matter how busy a day may get, continue to insure that the candidate is on the phone making those calls for contributions. Have someone checking the contribution forms from other campaigns; even though you are not supposed to use these lists for direct solicitations, you may get very good ideas as to who is capable of giving last minute donations. In many cases the income and expense reports may be available from government agencies or posted online.

Cutting the budget is never a pleasant task. However, in almost every campaign, items initially budgeted must be cut in order to pay for those items that will insure that the candidate's message receives the broadest circulation. Near the end of the campaign, every volunteer and staffer usually has a great idea that will bring the candidate over the top on Election Day. Stick to your game plan and remember that the media purchases that result in reaching the most of your targeted voters will be the best investment of your dwindling dollars. Some campaigns do allow

for good ideas by allocating \$200 a month to the “Good Ideas” account. This way you are able to keep volunteers and staffers thinking about what interesting, innovative ways the team can get votes.

Look in secret places where money has been placed in the budget: all the miscellaneous accounts need to be brought into focus. Take a look at the amount you are paying your consultants. Ask if they would be willing to trade the bill that remains with a larger one if you win. Check to see how much money remains in the bulk mail account. Check to see what contribution pledges remain uncollected and then send a staff person out to pick them up. Check to see what deposits you have made that can now be used to draw from to pay last minute bills. Go to each vendor to whom you owe money and tell them exactly what is going on; never avoid a bill collector as it only intensifies their energies against you. Talking to them usually takes some of the wind out of their sails.

Work on paying those bills which cannot wait: TV and radio time buys which have to be paid upfront, the bulk rate mail account, the telephone bill (and perhaps the electricity) and if you have to buy paper in order to print last minute flyers for the door-to-door strategy. You should have a plan for paying all those bills that you have incurred, however, now is the time for prioritizing. Voter contact comes first.

You Will Survive

Surviving the stress of the last thirty days takes some creativity and a lot of planning early in the campaign. A team that can rely upon one another and feel good about the base built earlier in the campaign, has a much better chance of surviving the unpredictable and often confusing last moments before the polls open.

Chapter 18

WINNING

Winning! There's no feeling in the world like it... it's the sweet reward for all that walking door-to-door hand shaking and political schmoozing. When the final votes are counted and your name is the one on top, you're hooked! That feeling will bring you back again and again to try your luck at electoral politics.

Enjoy it. Savor it. You earned it! And it will be over all too quickly. Once the spotlight is turned off, you have work to do to assure that your win wasn't a "one-time phenomenon" and that you'll be back again

As you proceed through your swearing in and actually take office, your new activities will occupy your time and energy. But winning or losing, there are important tasks that must be done to close a campaign before you move on to the opportunities waiting for you.

After The Ball Is Over... What Happens Now?

A common experience shared by most winners is the letdown that comes after Election Night is over. You'll be especially vulnerable because you've won, and you were expecting only good things to come from that. But the letdown is very real. After all, you've been the center of attention for quite some time. You've had constant crowds around, and people telling you how great you are. And the morning after, everything goes back to "normal"... normal for everybody else that is. Because you're off to a new challenge and "normal" for you will have to be redefined.

There's also the very real possibility that you'll suffer a physical let down, and may actually get sick. Your body has been pushed to its maximum for quite some time – you've held off the colds, the flu, and maybe even the migraines. Don't be surprised if those all hit at once.

Plan to take time off and restore yourself as soon after the election as possible. Everybody will expect you to be gone immediately after the election, but within a month that opportunity will be lost, and you'll be inundated trying to learn your new job.

It's time to rediscover your friends and family, and to remember what you like to do for "fun". You'll need to plan some activities to help you cope with the fatigue, physically and mentally. If you can get away for a vacation that's best, but if that doesn't work, plan movies, several good books to read, a nice long walk, take a trip to the spa with friends. Be creative and restore that energy. You're going to need it if you're going to be the best you can be at your new office.

Wrapping Up The Campaign

Before you move on to take up your new responsibilities, it's absolutely crucial that you wrap up the campaign you've just finished. Some of the necessary activities are things only you can do, such as writing personal notes, but much of what needs to be done can be done by others and will also involve your campaign team. You'll need to do it quickly while everyone is still in a campaign mood.

Thank You's

The thank you's began, of course, as you greeted that cheering crowd on Election Night who came to help you celebrate the victory, and those people were important. But don't forget to thank those who weren't there. Share the win with everyone who helped you gain it. Give credit to all those folks who worked so hard to make it happen.

On the list of those who get special attention should be:

- Your campaign manager

- All your team leaders (doorbelling, field, volunteer coordinator, others)
- Your fundraiser
- The people who did the little things for you (like who bought you extra pantyhose when yours ran, or who spent time talking with the voter who wanted to share a thousand ideas with you)
- Your friends who kept you going when things got tough
- Your family who loved you through it all

Make sure that thank you notes are sent to all contributors. Personalize them. If you feel there are too many to do individualized letters, then do a form letter but write a note on the bottom and sign each one personally. Remember, you'll need these folks again. The time it takes to thank them is well worth it.

Be sure to thank all volunteers and campaign staff members quickly. Again, they should be as personal as possible. Who knows, these notes may someday be on a list of "collector's memorabilia"! But in the meantime, they mean a lot to the people who gave their all to get you elected.

Next on the list of things to do is to take care of the unpleasant. There are two things most candidates dislike doing: calling the opponent to make amends. If the race was anything other than an absolute nightmare, you should call your opponent and offer your thanks for a good campaign. You may not be excited about making this call but you can afford to be gracious... you won!

Also, there are those people in your own campaign who ended up unhappy. You'll probably need a good honest discussion with your campaign manager to get this list. But there are always people who thought they should have been treated differently, or who simply expected more from you or the campaign in some manner. Mend the fences now. You'll need those people for your next campaign, and you need their good will as you begin your new job.

A Final Letter To Your List:

Send a wrap-up letter to your "list". By now you should have a really good list, beginning with your Christmas card list and ending with all those strangers who volunteered to take a yard sign. Share the win with them; let them know how much they meant to the campaign and to you personally. Let them know you intend to keep in touch regularly to share your new responsibilities – and then be sure you do it.

Critiquing The Campaign:

Call a meeting with your Steering Committee and critique the campaign; prepare a written record:

- The strategies that worked best
- The ones that didn't work at all
- Where your campaign weaknesses were
- How they could be strengthened for next time

This critique will be one of the most important things you do to prepare for the eventual reelection campaign. By now you have assembled a "winning team". The group has a tremendous amount of valuable information to share, but that information is all too often lost after the campaign is over. People move, their priorities change, they take new jobs and then when you want to recall just how a certain event was put together, you have to reconstruct it all over again.

To avoid that, a thorough evaluation is critical – while things are still fresh in everyone's mind. The purpose of this session with your team is to find out what worked and what didn't;

what went smoothly; where the wrinkles were; and what your team would do differently if they had to do it over again. It also brings a sense of closure to the campaign phase.

Put It All In Writing

Capture the expertise before it's gone. Ask each of your team leaders to write synopsis of what they did, how they did it and pitfalls to avoid – a kind of “how to” manual in an abbreviated version. You'll need these for the next campaign, and you'll be surprised at how quickly that comes around. These should be kept to one or two pages and can be stored in a three-ring binder, with one copy for the candidate and one for the campaign manager.

Get some cardboard file boxes and file your campaign records carefully so you can find things when you need them. Save copies of:

- Fundraising letters and event invitations
- Artwork for signs and brochures
- Brochures and newspaper ads
- Newspaper clippings
- Public finance disclosure records
- Lists of volunteers
- Anything else you may want to refer to again

Be sure to label folders with the campaign year and name. You'll want to have samples of all your materials available to share with other candidates and for the next time you need them yourself.

Building A Transition Team:

While you still have the Steering Committee together, ask them to help build a “Transition Team” of advisors to assist you in your new role. You'll need a group of people to turn to for advice on issues, ethics and much more. It probably should be a new group, but you'll definitely need some continuity between the old and the new. Ask your best campaign advisors to serve on the cabinet. Keep the group small and clearly define what you'd like them to do. Schedule regular meetings for the group during the first six months. Later on you'll appreciate having someone who knew the campaign volunteers working with your cabinet advisory group and your new staff.

A Transition Team can serve many useful purposes. One of the most helpful is to have them provide feedback on how you're doing in your new job. They should be your eyes and ears in the community, and they can provide advice on issues. You'll certainly want them to assist you developing a game plan for carrying out your new responsibilities. They can help you:

- Identify important campaign people you need to stay in touch with
- Reach out to other community leaders
- Develop a game plan for dealing with the press
- Fundraising

The Actual Cleanup

Clean up the leftovers. Collect all the yard signs (there's nothing worse than having old, weathered signs still up to become eyesores. People will remember those long after you've finally removed them). Retrieve the extra “stuff” from each of your coordinators and dispose of those things that aren't needed. Do save extra copies of brochures and lists. Don't expect someone else to clean up headquarters, or someone's home or office that may have served as headquarters. At this point, no one cares as much about these things as you do.

Getting the List in Order

Clean up your list NOW! You'll need to mail to the list again very soon. Go over it and correct any errors; add names and make sure everyone is on the list. If you use a computer to maintain your files, have someone enter the last of the contributors, and the new volunteers; then run a final list. Run a set of labels at the same time, so you're ready for your first mailing.

Retiring the Debt and Fundraising

Plan a fundraiser. If you have a campaign debt, it's important that you immediately begin raising money to retire it. Shortly after you're in office, people will be unwilling to spend money to retire a debt. After all, you're a winner now, and that becomes your problem! Begin with a letter to your list and ask for a specific amount of money. You can also develop a "sub list" of people who can (and probably will) give more. If a letter doesn't provide enough to retire the entire debt, you will want to schedule an event for that purpose. Make it fun and low-cost. But most of all, do it quickly. A letter should be in the mail within 10 days of the election and an event should happen within 30 days. After that, you've lost the momentum.

Even if you have no debt, it's appropriate to capitalize on your win and schedule a fundraiser. Quick action to celebrate the victory can help build the coffers for your next campaign. There will be a lot more people who want to contribute to your campaign now that you've won. People who supported your opponent will probably want to be on the winning side, and a victory fundraiser is an excellent way to help them get on board!

The Final Party

Last, but not least, throw a party for the volunteers and supporters. It takes a lot of people to run a successful campaign, and you now have a loyal group of supporters that you'll want to keep actively involved in your electoral career. A nice thank you is always appreciated, and supporters will remember for quite sometime that you cared about them after the win, and not just before.

Transitioning To Elected Office

Now that the election is over and you've filed the campaign away, it's time to start thinking like the elected officeholder that you are. Transitioning is difficult. You've been "programmed" for quite some time to make "campaign statements" about the issues and how you'd handle them if elected. Now it's time to make good on those statements, and it's a lot harder than you might have thought.

Develop a Game Plan

Take time to develop a game plan for your first term (or at least your first year in office). That plan should include:

- Short-term and long-term goals
- Identification of issues you want to be involved with, currently and for future offices you might want to hold
- An action plan for staying in touch with your constituents (whether through mailings or town hall meetings or some other form of contact)
- A specific press plan for how you want to be perceived by the voters of your district and for getting your message across.

You'll probably want to select some issues that match your campaign themes. You may want to get involved with some issues that will establish your credibility in areas that are important to the district you represent and for which you need to develop your expertise. Often these may be issues that aren't considered "women's issues", such as military issues (if your office is federal or there's military base in your district) or long-term economic development (especially if your office is statewide).

The plan should be specific and include a press plan. The press plan is very important and will take more than a little creativity to carry out. In your press plan you should:

- Identify the key press people in both the print and nonprint media
- Set a regular time when you'll contact them to offer information
- Identify "special interest" story opportunities you have
- Develop a timeframe for getting to know the media people who cover your area

Get to know press people personally, so neither of you is intimidated. It's very important that you feel comfortable calling them. If you haven't gotten acquainted along the campaign trail, introduce yourself now. Arrange appointments with the editorial boards of all the major papers, telephone your local radio "personality" and outline your agenda for them. Let them know what you hope to accomplish and how you intend to go about it. Pick one issue and ask yourself, "What is the public interest in this? Why should people care?" The answers to those questions are what will make news.

Dealing With "Information Overload"

Perhaps the most difficult aspect of transitioning into office is learning to deal with "information overload". You'll suddenly be given reams of paper to read, and you'll be expected to quickly assimilate the information and be able to participate in discussions and decisions on the issues. No matter which office you now hold, you'll find that there is no end to the number of complex decisions you're asked to make. Some hints that may help:

- Talk with your new colleagues about what's important and what's not. They can give you advice about handling the volume of paperwork and about issues that are going to be quickly before you for decisions, as opposed to those that can be delayed a bit. "Old timers" will usually have developed a system for dealing with all that information, and you may learn some shortcuts by simply asking for ideas and suggestions.
- Don't prepare for everything at the same time. Try to identify the cycle for the office you hold. If the budget is the next decision on the agenda, concentrate your efforts on learning the rudiments of the budget. You'll probably want to identify one or two aspects of the budget and focus your efforts there, rather than trying to become expert on every part.
- Set up briefings on issues rather than just reading materials. You can learn more in a briefing atmosphere which allows the opportunity to ask questions and put ideas in order. The reports and detailed briefing papers will then be a good supplement for follow up study.
- Look for "executive summaries" and learn to identify the important questions so you don't need to read an entire report to get the important information necessary for decisions.
- Don't spread yourself too thin. You can't become an expert on everything, and you'll build far more credibility if you demonstrate expertise in two or three areas and really know the issues.

Analyzing The System

Success in public office, or almost anywhere for that matter, depends in large part on your ability to analyze the system. Elected office is no exception. There are patterns of behavior, or "norms", there as well as elsewhere. You'll need to understand the intricacies and nuances of that system if you're to get your agenda adopted.

One of the most positive ways to learn about a new system is to find a mentor – someone who's been there long enough to know how things work, and who's been successful in getting things done. Look around you and try to identify folks who fit that description. Watch them work for awhile and if they have something to offer that would be helpful to you, approach them and ask for advice.

There are often no other women in the office you hold, and you will more than likely need to depend on a male mentor. If you can find one who's willing to share his knowledge, it can be exceptionally helpful.

Some Pitfalls To Avoid

Try not to be defensive about being a “woman in office”. If you're the first, or one of few, you're going to be a novelty. You will be treated differently. But often, it's simply because people don't know how to treat you. Suddenly you aren't the same, and they are uncomfortable trying to figure out what's appropriate. You'll need a good sense of humor and a willingness to overlook the small, unintended slights.

Don't fall prey to the attitude that some women take – the “What you see is what I am, and I'm not going to change it” routine. Smart office holders adapt to their surroundings. They decode the system and figure out how to work within it, and that sometimes means doing things differently. Much of what we consider to be “game playing” is really the different approach men take to working in groups. Unless you're lucky enough to be holding office where a majority of the members are women, you'll need to remember you're playing on their court, by their rules, and it's still pretty much their game.

Don't get so caught up in your issues that you miss what's happening around you. There's much more to being effective than just reading your materials and doing your homework. Being a part of the new group; getting to know people and having them get to know you; being liked by your colleagues, as well as respected; all of these will get you the many small favors you'll need to make the changes you ran to make. Learn the rules of this new game, and the penalties for breaking them. Be prepared to take risks, but make sure they're calculated risks based on the information you can gather by being observant and using the knowledge you bring to the job.

Being The Best There Is

Women have a lot to offer in public office, that's why you ran. So you want to make sure you do the kind of job that makes it easy for other women to follow in your footsteps. For most of you that's easy. Women are used to working harder for the recognition, studying longer to get the grades and working for all the right reasons (because it's the right thing to do) without worrying too much about the credit.

Remember that you ran to make a difference and to do things differently. So use your new power in a positive way. Don't succumb to the desire to get even with those who supported your opponent, or those who didn't come through for you. And be supportive of the women around you, including those who make the coffee!

Develop a strong network within your new arena. Your colleagues have a lot to offer in the way of information and in showing you the ropes. Step forward and meet them more than halfway. Identify the staff experts and develop a good working relationship, so their expertise is always available to you. Identify your weaknesses and begin to correct them. You'll probably have education and training opportunities available to you in your new office. Put them to work for you.

The staff you hire will be one of the most important decisions you'll make. Too often we hire people who “mirror” ourselves. They're people who have the same strengths we do, which is why we're attracted to them in the first place. But the down side of that is they usually have our same weaknesses, and we don't always recognize that! Go back to your plan of action and look carefully at what you hope to accomplish in your term. What kind of skills will be necessary to do that? Look for staff who will complement your talents and who have the experience and expertise to help you accomplish the goals. You'll want to build a real team, no matter how large or small your team may be. That means hiring people who are compatible with each other, as well as people who work well with you.

You will doubtlessly find that some of those who worked on your campaign will want to fill those positions on your staff. If they have the skills you're looking for, that would be ideal. But don't hire campaign staff if they aren't qualified for the job, or if they don't have the skills you'll

need to achieve your goals. Saying “no” may be the toughest thing you have to do, but do it honestly and directly if that’s your decision. Let the person know the skills you’re seeking and why you feel someone else must fill the position. Don’t leave this job to someone else. It’s important that you handle any turndowns personally.

You’re going to need a support group to see through the rough spots. This first term can be a difficult one. You have a lot to learn, tough decisions to make, people who are counting you to “save the world” and sometimes you’re going to be tired and drained. You’ll also face ethical questions that will put you to the test – “Is reelection more important than my bottom line?” Those times will be much easier if you have a small group of friends who will honestly discuss the decisions with you and tell you when they think you’re wrong. You may want to meet with them regularly, rather than calling them together when a specific problem arises. They can be surprisingly helpful in dealing with the daily aspects of your new job. They will also be your lifesavers when things go wrong.

Use the support group as well as the Kitchen Cabinet to review your progress toward fulfilling your game plan. At least quarterly you should review your plan and make changes where necessary.

It’s Reelection Time

Before you know it, it’s time to run again! The second time around you’re an incumbent, and the target of all that campaigning you dished out last time. So it’s very important to stay prepared throughout your term of office and use your opportunities to strengthen your position.

Look for speaking opportunities within the community. New officeholders are especially in demand on the speaking circuit. You have fresh ideas and new ways of looking at the same old issues, so don’t hesitate to suggest that you’d like to address the group. Be willing to accept as many of the invitations that come as possible.

Keep your list up to date. As people get to know you, add them to the list. As you resolve problems for people, add them to the list. If you have opportunities to mail newsletters and information to your constituents, do so. When someone says, “I’d love to help you on your next campaign,” add them to the list and do a follow up letter (on campaign letterhead, of course) thanking them for the offer.

Depending on the office you hold, schedule “Town Hall” meetings or “District Days” on a regular basis. Look for opportunities to co-sponsor local community events with your radio stations or newspapers. You’ll be asked to participate in all kinds of strange (and sometimes wonderful!) charitable events. Most of them are great ways to build camaraderie and recognition with your voters. Some are worth thinking twice about. Set your own limits, but be available to the community you represent.

Plan an annual fundraiser and make it something unique that can become identified with you personally. Don’t let people get out of the habit of making donations to your campaign. If you’re as successful as I think you’re going to be, campaign dollars will be harder to raise next time, because folks will feel you “can’t lose”!

Winning isn’t everything, but it sure beats losing! And winning the second time around will require all the skill and political expertise you can assemble. You can assure that win by doing the best possible job in office, using your opportunities as a community leader to solidify your support, and keeping a strong campaign organization in place while you’re in office. Good luck... we’re counting on you!

Not Winning

Losing. One word captures all the fears that candidates accumulate throughout the entire campaign.

After all the money that has been spent, after all the sleepless nights, after all the built-up expectations, how can anything which took this much time result in a failure?

Losing is something campaigns and candidates never mention: how can they? Too much of the energy required to keep everyone working towards the same goal requires a total focus on winning. It is too painful a subject and too demoralizing a thought to dwell upon for long.

But, it does happen. And, unfortunately for women who run and lose, it takes them out of the mainstream politics too many times. Running for office is an investment not only of your time and money, but also of your reputation and name recognition. Too often a woman who loses retreats into depression which lasts through the next campaign cycle. In the worst case scenario, she never comes back to the political world.

Women who lose need to understand that there is life, political life, after losing. Yes, it is appropriate to grieve the loss. Yes, it is okay to relive all the campaign decisions again and again and wonder which ones might have combined to make things different. And, yes, it is expected you will never want to run again. However, all of this is part of the road back to recovery from a loss. Where some men look at losing as a natural part of the climb up the career ladder and the development of contacts and networks for their next campaign, women usually regard it as the end of the rope.

How to start the road to recovery? First there are the inevitable details of closing up the campaign which must happen immediately. As soon as the results are in, get a good night's sleep and then head back to the office to organize the closure of your campaign, physically and emotionally.

Determine how you will handle your opponent's victory. A gracious loser is often remembered more warmly than the winner. Some losing candidates will concede the loss at a press conference or at election central on Election Night as soon as the returns are convincing. Others will call the winner and congratulate him on the win. Still others will offer any assistance they might give the winner in helping to heal wounds created in the heat of the campaign.

A gracious way of accepting defeat is to go to your opponent in person, and in front of the cameras offer your congratulations and support.

Take hold of the checkbook and do an inventory of what expenses remain to be paid. If there are bills outstanding, call the vendors or those to whom you still owe money and explain that you are developing a post-campaign fundraising plan to clean up the remaining debt. It is often much easier to outline the terms of your payments if you call your vendors first, rather than react to them after they have called several times.

Call your finance coordinator and active Finance Committee members and ask them to help you put together a realistic plan for retiring the debt. If you have congratulated your opponent and offered him help, you may be able to ask him to help you retire the debt by holding a fundraiser or calling a few of her high donors. Traditionally there are a number of high donors who did not contribute to you in the campaign, but will help you retire the debt. Businesses with political action committees are good prospects.

Organize the files and be realistic about what you want to keep. Find an appropriate place to store the important files. Critical information you will want to keep includes:

Newspaper clips, videotapes of debates and speeches, radio show visits

Copies of all printed brochures, public policy issue papers, mass mailing letters

Lists of people who contributed money, volunteered time, or otherwise supported the campaign

Lists of important groups whose membership you targeted

Maps outlining your canvassing, phone banks, and mailings

Yard sign locations list, but not the yard signs themselves. Once used the signs are not worth saving, although the stakes may be reused.

Talk with your volunteers and staff. Get everyone to pitch in and help close up shop. It takes enormous amounts of time to store, return, throw away and find a place for all the supplies and odds and ends that inevitably find their way to campaign headquarters. With all the emotional

energy spent, it is hard to motivate people to help. However, the loyal team members can still be counted upon to help if they also get a chance to deal with the defeat as a team.

Even though it may be hard to talk about what happened, let your staff and volunteers dissect what went wrong. Do it without blame and remember that no one action or inaction caused the defeat.

Schedule your time according to your energy. Get the headquarters closed and then take time to get away from the political flurry. Create some rest time, some time with your family and close friends, and some time for closure.

Thank your team: high donors, longtime supporters, faithful volunteers and dedicated staff. There are different ways to thank your workers. For the top dozen or so key workers, you will want to send a special note, signed photo or something which these workers will keep forever. Others should get a telephone call. And, after a month or so has gone by following Election Day, you will want to have a team party where everyone can begin to plan the next team effort.

Losing is the end of one campaign. It should not be the end of a political career. As you close down one campaign, you need to begin the next one. If you don't have a campaign on the horizon, take the center stage of a cause, a program or an appointment.

Keep your team together. Send out regular newsletters or simply call the team together to help on a local bond issue, a particular civic event or a simple party or get-together. If you don't use your volunteers, you will lose them. Find a way for the team to work together, and they will stay together in your name. Keep up your website so supporters can stay in touch.

A campaign loss need not signal disaster, merely a temporary setback. Center yourself and take time to deal with the emotional setback. But, don't take too long... your public awaits your return.

Appendix

Sample Forms

Campaign Budget

Reimbursements

Fundraising Plan Worksheet

Candidate Personal Phone Solicitations

Candidate Schedule Request

Event Planning

Event Checklist

Event Supply List

Home Event Checklist

Mailing Party Checklist

Phone Bank Checklist

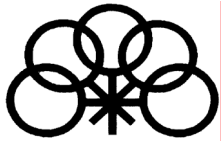
Campaign Permission Slip

Event Sign-In Sheet

Sample Employment Contract

Remittance Envelope

Campaign Budget	June	July	Aug.	Sep.	Oct.	Total
A. Voter Contact Plan						
1. Postage						
2. Copying/Printing						
3. Labels and Lists						
4. Brochures/Flyers						
5. Graphics/Layout						
6. Yard Signs						
7. Phone Banks						
8. Buttons, Balloons, Stickers						
9. Misc.						
B. Media						
1. Newspaper						
2. Radio						
3. Television						
4. Web site						
C. Salaries						
1. Manager						
2. Fundraiser						
3. Other						
D. Consultants						
1. General Strategy						
2. Polling/Pollster						
3. General/Media						
4. Debate Coach						
5. Photography						
E. Fundraising						
1. Direct Mail						
2. Events/Invitations						
3. Phone Banks						
F. Office Expenses						
1. Rent/Utilities						
2. Telephone						
a. Headquarters						
b. Cell Phones						
3. Equipment						
4. Supplies						
5. Copying						
6. Misc.						
G. Travel						
H. Volunteer						
TOTALS						



Reimbursements

Name _____

Address _____

City _____ State _____ Zip _____

Phone (home) _____ (work) _____ (cell) _____

Email _____

Budget Category Key

A. Voter Contact

1. Postage
2. Copying/Printing
3. Labels and Lists
4. Brochures/Flyers
5. Graphics/Layout
6. Yard Signs
7. Buttons, balloons, stickers
8. T-shirts
9. Other

B. Media

1. Newspaper
2. Radio
3. Television
4. Other

C. Staff Salaries & Benefits

D. Consultants

1. General Media
2. Photographer

E. Fundraising

1. Invitations
2. Direct Mail
3. Events

F. Office Expenses

1. Rent/Utilities
2. Telephone (Land line)
3. Cell Phone
4. Equipment
5. Supplies
6. Copying
7. Misc.

G. Travel

H. Volunteers

I. Research

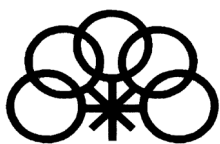
1. Polls
2. Focus Groups
3. Opposition Research

J. Computer

1. Computer Purchase
2. Software
3. Staff/Benefits
4. Web-design and Maintenance
5. Internet Service

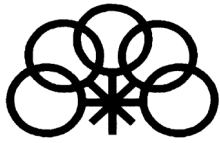
Please code all expenses by category number (e.g. Photocopying a mailer would be A-2; reimbursement for campaign telephone calls from your home would be E-2-a.)

Date	Budget Category	Item/Purpose	Amount
Total			



Fundraising Plan Work Sheet

	May	June	July	Aug.	Sept.	Oct.	Nov.	Total
Personal Phone Solicitations								
Direct Mail Solicitation								
Home Fundraisers								
Special Interest/PAC Solicitation								
Large Populist Events, Auctions, Etc.								
Internet Donors and Online Donations								
Celebrity Fundraisers								
Finance Committee Solicitation								
Estimated Monthly Total								
							Total	



Candidate Personal Phone Solicitations

Prospecting List

Name _____ Home Phone _____

Email _____ Work Phone _____

Mailing Address _____

Employer/Occupation/Position _____

Where the Prospect's Name Came From _____

Past Donor History _____

Amount to Request from Prospect _____

Campaign Pledge _____ Due _____

Follow-Up E-mail: When _____ By Whom _____

Follow-Up Phone Call: When _____ By Whom _____

Personal Pick-Up of Contribution ☐ Yes ☐ No

Donation Received ☐ Yes ☐ No

Response Sent ☐ Yes ☐ No When _____

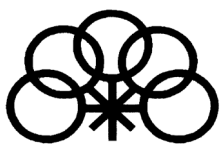
Second Response Sent ☐ Yes ☐ No When _____

Other follow-up with donor necessary (volunteer help, in-kind contributions, other names for possible prospective donor list, etc.)

Notes:

Date: _____

Who contacted prospect (initials): _____



Candidate Schedule Request

Please fill out all information requested.

Event Title: _____

Target Audience (who, how many): _____

Day, Date of Proposed Event: _____

Time: _____ Address of Event: _____

Directions to Event: _____

Who Will Accompany Candidate: _____ Whose Car: _____

Time the Candidate Will Speak: _____

Sponsor of Event: _____ Phone: _____

Contact Person: _____ Phone: _____ Cell: _____

E-mail: _____

Who Will Greet Her: _____ Title: _____

E-mail: _____

Who Will Introduce Candidate: _____ Bio Sent: _____

Where Will Candidate Sit: _____

Media Notified: _____ Likely Attendees: _____

Speech, Format or Presentation Details: _____

Questions That Might Be Asked: _____

Does Candidate Need Briefing: _____ By Whom: _____

Will Other Candidates Be There: _____ Who: _____

Campaign Literature Allowed: _____ Who Will Bring: _____

Date Invitation Was Received: _____ Phone: _____ Letter: _____

E-mail: _____

Date of Acceptance Invitation: _____ Phone: _____ Letter: _____

E-mail: _____

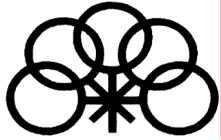
Date of Rejection of Invitation: _____ Phone: _____ Letter: _____

E-mail: _____

Reason: _____

Other Comments: _____

Date: _____ Who contacted prospect (initials): _____



Event Planning

☐ Voter Contact ☐ Media ☐ Fundraiser ☐ Joint Appearance ☐ Other

Event/Activity Information

Event Name: _____

Campaign Coordinator For Event: _____ Phone(s): _____

E-mail: _____

Date/Time: _____ Location: _____

Sponsor – Name, Address, Phone(s): _____

Sponsor Contact Person: _____ Phone(s): _____

E-mail: _____

Event Description: _____

Estimated Attendance: _____

Specific Concerns/Interests: _____

Other Candidates/Dignitaries Present ☐ Yes ☐ No If yes, who: _____

Media/Press Present ☐ Yes ☐ No Open to Public ☐ Yes ☐ No

☐ Quick In-and-Out ☐ Discussion of Issues What Issues: _____

Arrival Time: _____ Departure: _____ Time/Location of Next Appearance: _____

Driving Instructions: _____

Event Budget

Advertising

Mailing/Invitations

Printing

Postage

Design/Typesetting

Other

Site Costs

Permits: Park, Liquor, Banquet _____

Decorations _____

Food _____

P/A Equipment _____

Entertainment/Music _____

Rent _____

Other _____

Total Event Expenses \$ _____

Projected Revenue

Advance Ticket Sales _____

Sponsors _____

In-Kind Contributions _____

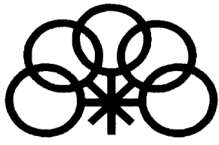
At the Door _____

Total \$ _____

Event Checklist

Date: _____ Time: _____ Cost: _____ \$ Goal: _____
 Location: _____ Phone: _____ E-mail: _____
 Coordinator: _____ Phone: _____ E-mail: _____
 Host/Hostess: _____ Phone: _____ E-mail: _____

	Person Responsible	Deadline	Done!
Check time conflicts with other campaigns, sporting events, parties & put on calendar			
Confirm facilities, insurance, staff			
Invitation & tickets – design/layout; printing and postage			
Ticket distribution			
E-mail reminders			
Mailing party			
Phone Banks			
Refreshments – Food & beverage payment; pick-up on day of event			
Entertainment			
Photographer			
Media advisories & releases			
Banquet permit, liquor license			
Napkins, plates, glasses, etc.			
Obtain name tags, pens, sign-in sheets, volunteer cards, campaign literature			
Set-up table volunteer(s)			
Sign-in table volunteer(s)			
Food/drink volunteer(s)			
Clean-up volunteer(s)			
Inform adjacent neighbors/businesses			
Candidate calls guests			
Send out thank you notes to key people			
Final report and critique			
Other			



Event Supply List

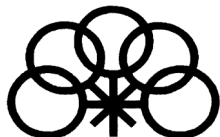
Name of Event: _____

Campaign Coordinator for Event: _____ Phone(s): _____

E-mail: _____

Date and Location: _____

Number Needed	Item	Number On-Hand	Number To Order	Number Returned
	Balloons and string			
	Banner			
	Bio-sheets/ flyers			
	Brochures			
	Bumper stickers			
	Buttons			
	Contribution envelopes			
	Helium tank			
	Issue papers (specify)			
	Liquor permit			
	Miscellaneous supplies			
	Name tags			
	Note pad and pens			
	Press clips			
	Receipt book			
	Sign-in sheets • Attendees			
	• Endorsements			
	• Volunteers			
	Stickers			
	T-shirts			
	Table and chairs			
	Tape and scissors			
	Volunteer cards			
	Yard signs			



Home Event Checklist

Checklist

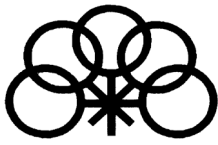
- ☐ Budget
 - Invitations
 - Postage
- ☐ Directions acquired
- ☐ Event put on candidate's schedule
- ☐ Flyers designed for neighbors
- ☐ Flyers distributed door-to-door in area around coffee
- ☐ E-mail designed and circulated
- ☐ Host given event checklist and agenda
- ☐ Invitations designed and printed
- ☐ Invitations mailed
- ☐ Location selected
- ☐ Phone bank to mailed list
- ☐ Time confirmed

Event Checklist

- ☐ Balloons / yard signs outside to mark location
- ☐ Campaign materials
 - Brochures
 - Schedule of events
 - Volunteer forms
 - Contribution envelopes
- ☐ Refreshments
- ☐ Cups, plates, napkins
- ☐ Name tags
- ☐ Sign-in sheets
- ☐ Signs up in neighborhood

Sample Event Agenda

4:30 Set-up begins
6:00 Start time
6:15 Candidate arrives and meets each guest
6:40 Candidate gives 10-15 minute speech
6:50 Q & A from the audience
7:05 Pitch for money and volunteers
7:30 Candidate leaves



Mailing Party Checklist

Please submit this form at least one week prior to mailing date.

Purpose: ☐ Voter Contact ☐ Fundraiser ☐ Finance ☐ Other _____

Coordinator _____

Phone(s) _____ E-mail: _____

Proposed mailing date _____

Number of Pieces _____

Mailing list(s) to be used _____

Proposed materials approved ☐ Yes ☐ No

Proposed text approved ☐ Yes ☐ No

Location of mailing party _____

Location reserved ☐ Yes ☐ No

Date of mailing part _____

Volunteer coordinator contacted ☐ Yes ☐ No Date _____

Number of volunteers needed _____

Refreshments needed ☐ Yes ☐ No Itemize _____

Money in bulk mail account ☐ Yes ☐ No

Printer Deadlines

Copy _____

Proof _____

Pick-up _____

Costs

Printing _____

Labels _____

Postage _____

Other _____

TOTAL _____

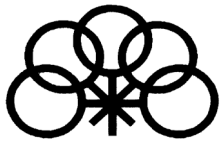
Approved _____ Date _____



Purpose: ☐ Voter Identification ☐ Fundraising ☐ Event

Proposed scrip

Script approved ☐ Yes ☐ No



Campaign Permission Slip

During the course of the campaign, there are photographs that are taken for use in campaign brochures, newsletters or TV ads that include people other than the candidate. To use these photos, videotapes, or snapshots, the campaign requires permission from the people captured in these pictures. If children are in these photographs, then parents need to sign on behalf of their children.

Date of Photo _____

Campaign Photographer _____

Phone _____ E-mail _____

Possible Use of Photo _____

Name of Person in Photo (please print) _____

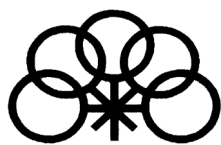
I give my permission to use my picture (or my children's) in campaign material presented by the (NAME OF CAMPAIGN). I understand that the picture will be used only during this campaign and further understand that the photo will not be used out of context or be tampered with for effects other than that which has been explained to me.

Name

Address

Phone

Date



Event Sign-In Sheet

Event _____ Date _____

Name	Address	Phone	Phone	E-mail	Occupation	Business	Contribution	Endorsement

Note: Election regulations require us to ask for your occupation and business.

Sample Employment Contract

Campaign: _____

This is an employment contract for professional services between _____, herein known as the candidate, and _____, herein known as the campaign manager, for mutual services to be performed in conjunction with the _____ Campaign.

I. Services to be Performed by the Campaign Manager

- A. Drafting of a campaign plan outlining the overall campaign strategy, including a media plan, budget, fundraising, timeline, field plan, organizational chart, targeting analysis and a scheduling strategy. The campaign plan will be completed within thirty days of the date of hiring the manager.
- B. Assembling a campaign staff, full-time and part-time, paid and volunteer, to carry out the key responsibilities of the campaign. Hiring decisions will be made by the manager after consulting with the candidate. The manager will monitor the progress of the staff during the campaign and make any changes deemed necessary.
- C. Managing the office, including setting priorities for personnel and financial resources, as well as setting office policies, making personnel decisions and maintaining quality control. The manager may delegate responsibilities to other members of the campaign staff as required by time restrictions.
- D. Determining the consultants needed by the campaign, seeking appropriate applicants, and recommending specific consultants to the candidate. No consultant will be engaged without the consent of the candidate.
- E. Being chief spokesperson for the campaign on matters involving the campaign finances, strategy, staff and all operations. The manager is responsible for accumulating information on opposing campaigns and generally being informed central for the _____ Campaign.
- F. Being the central contact with the candidate's family.

II. Just Compensation

The campaign manager will be paid a salary of \$3,000 per month plus expenses, as approved in the budget. The salary will be paid monthly on the last day of the month. In addition, if the candidate wins the general election, the manager will be paid a bonus of \$3,000.

☐ I will help elect Fran to Seattle City Council. Enclosed is my contribution of:

☐ \$650 ☐ \$300 ☐ \$100 ☐ \$50 ☐ \$25 ☐ \$ _____ I pledge \$ _____ per month

I'd prefer to have my contribution on MasterCard ☐ Visa ☐ Amex ☐ _____

Card Number: _____ Expiration: _____

Security Code (back of card): _____ Signature: _____

Name: _____ Email: _____

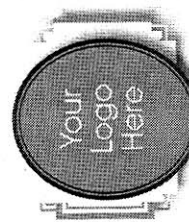
Home Ph: _____ Work Ph: _____ Fax: _____

Address: _____ City: _____ State: _____ Zip: _____

Occupation: _____ Employer: _____

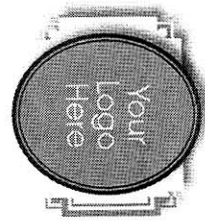
Required by State law for contributions of \$100 or more.

Place
Stamp
Here



400 East St. # 2079
Seattle, WA 98146

THANK YOU



I am available: ☐ Days ☐ Evenings ☐ Weekends

To: ☐ Host a home party ☐ Put up yard signs ☐ Door-to-door

☐ Work election day ☐ Phone ☐ Help with mailings

☐ I would like a yard sign Other: _____

☐ May use my name for endorsements. Signature: _____

☐ Yes, send me email updates about the campaign! _____

Please make checks payable to Friends of Fran Smith
Paid for by Friends of Fran Smith
400 East East St. #2079 • Seattle, WA 98146