

# **REPRESENT!**

**A non-partisan beginners guide to running for local office**

**Developed by the Central Valley Partnership**

**In Collaboration with:**

**The Dolores Huerta Foundation  
The Sierra Club - Tehipite Chapter  
The FMTK Central Labor Council**

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## Campaign Strategy

Planning a campaign is no simple task. But with the right people, time and commitment, you can make all the right moves to put together a winning effort. This section will take you through the necessary steps to help build the strategy for a successful campaign.

- **Expectations**

So you want to run for office? Being motivated enough to sacrifice your personal life to represent your neighbors is an honorable first step. But initially, take a step back and assess your expectations to make sure you don't over- or under-commit to this journey.

First, you need to consider the possibility of losing your first race. Successful elected officials often reflect on their lost elections as the time in which they learned the most about themselves, their constituents and campaigns. It is helpful to have a "must-win" mentality, but that can lead to extreme fatigue and stress if you don't manage your expectations.

Second, what if you win? Have you thought about the time commitment that elective office requires once you have actually won? Sometimes being a candidate is the fun part. Governing can be a thankless business that requires you to truly desire community representation and personal sacrifice. Understand the expectations both of being a candidate and holding elective office before jumping in with both feet.

- **Desired Elected Position**

Choosing the right level of government to pursue will be critical to your success. Most first-time candidates are drawn into politics through frustration with local, state or national policy. Most often, it is national policy. The things we see in the media draw our attention, and the national figures that represent us so often seem disingenuous and out-of-touch. These types of scenarios cause first-time candidates to jump into races far beyond their starting skill levels.

Politics is an exhausting industry built on money, power and relationships. If you want to be in the big leagues, you should generally start by batting against players with the same level of skill and work your way to the top.

So if you want to be a member of the State Senate or the U.S. Congress, target an office below that to begin with and consider how long you plan to seek elective office and how long you plan to live in the district(s) in which you will be building your reputation.

- **Mapping Election Calendar**

Time management is one of the hardest things to master in campaigning. There is a finite amount of time before Election Day, and you will undoubtedly run into problems without an election calendar. To build an election calendar, you always start on Election Day and work backward.

First, chart every important legal date relating to the campaign. Key examples are the candidate filing deadline, financial disclosure deadlines, vote-by-mail registration and mailing dates, major holidays and any other dates that cannot be moved or missed.

Second, chart family obligations, employment obligations, endorsement time lines, major community events and other dates that you should definitely not miss.

Now you have the bones to your election calendar. If possible, create a giant calendar in your campaign HQ (even if it's your living room) so you can have a visual understanding of your life for the next several months. You can now begin to plan campaign activities that are more flexible and map out your daily schedules.

- **Setting a Realistic Schedule**

Running for office is a 24-hour job until Election Day. You must remember to take breaks, incorporate your family and prevent yourself from “burnout” before the final push. Your schedule is a strategic asset, but only if used correctly.

Use your schedule to gain media attention, control the campaign dialogue, reinforce your message and reach targeted voters. You don't have to be campaigning 24 hours every single day. What you need is focus and flexibility.

- **Budget**

Spoiler alert: Campaigns don't run on good will, not for long at least! You will need money to run an effective campaign. How much money? That depends on the level of government and how many candidates are in your race, but you must be prepared to ask strangers for money to support your message to have any chance at all.

Start by considering how much of your own money you would be willing to donate to your campaign. It should be a minimum of \$500. But before you jump straight into fund-raising, do an assessment of how many voters you plan to contact and how much money it will take to contact them. Map out your voter contact plan (field), and be sure to consider the mandatory fees required to actually appear on the ballot.

Every race is different. Small races can be won with \$5,000. Most budgets for local offices should aim for at least \$10,000. Create budget priorities that can be added or removed based on the success of your fund-raising.

- **Fund-raising goals**

Establishing realistic fund-raising goals is a multi-step process. After you establish your budget and corresponding priorities, break down how much money you need to raise each month, each week and at each fund-raising event.

Fund-raising will definitely be the most difficult part of your campaign, and the vast majority of candidates struggle with it. You will need to make phone calls, establish easy ways to donate and host many small events every month to gain momentum.

Your goals will suffer if you do not focus time on fund-raising every single week. You will also fail to meet your goals if you are not personally asking for contributions. This is not a task to delegate. But with weekly goals and a realistic budget, you will find your stride and hone your messaging after a few weeks.

- Issues you will run on

Most potential candidates are inspired to run for public office based on the desire to change something or implement policies they think are beneficial to the public. However, the policies that inspired you to run might not always equal a winning message.

It's important to realize that you must educate yourself on a wide variety of topics before hitting the campaign trail and posting your platform on social media. The best education you can get is from your neighbors and unfamiliar constituents in your district. The most successful leaders in the public arena have the ability to listen, build consensus and implement policy.

Before mapping out your platform, take these steps: Develop a basic set of ideas you want to bring to your desired elected office, define your core values and why you truly want to represent your neighbors, and then knock on 500 or more doors to introduce yourself to the district. Your job is to listen to their concerns and present yourself as a capable representative.

After you have completed this process, you will have a much better understanding of what your constituents actually want and not what you perceive they want. A winning campaign message will take different parts of a larger platform and market them differently to specific demographics. You must be flexible and disciplined with your platform.

## Candidate Assessment

As you contemplate your ability to become a successful policy maker, you should understand clearly that candidacy and governance require different skills. There are many great candidates who turn out to be unsuccessful or immoral policy makers. Likewise, there are many examples of potentially great policy makers who do not have the skills required to inspire voters. This section is about self-assessment, self-awareness and the willingness to pursue personal growth.

- **Personal Skills**

The one thing that you will do more than anything else during your campaign is talk with people. You will talk to voters, the media, donors, activists, organizational leaders and other candidates (sometimes your opposition). You will likely talk with people from every age group, religion, party affiliation and demographic group in your district. Some candidates will find this as the easiest part of the job, whereas others will find this burdensome.

Personal skills are important! You will need them for the rest of your potential career, and you will be asked to speak to people and groups for the rest of your potential elected career. If you are weak in this area, consider communication classes. Fortunately, regardless of your personal skills at the beginning of your campaign, you will undoubtedly improve by the end.

One thing to keep in mind is that most voters never get to meet candidates in person. You should tell your story but encourage the voter to share their experiences and listen more than you talk. This will give you valuable lessons and help you connect with your constituents.

- **Ethics/Values**

Why are you running? You will get asked this question more time than you care to answer. But during the assessment period, this question is more valuable for you to ask yourself with sincerity.

Too many elected officials become politicians instead of public servants. Some run with the best intentions and become disconnected. Others run with bad intentions and game the system to their own benefit.

Handling the public's money, health and safety requires the highest commitment to ethics. Those who become true public servants are people with a clear understanding of their core values and the difference between right and wrong.

Think about why you are running and use that answer as your driving force every day. But make sure you are committed to improving your neighbors' lives and not your personal well-being.

- **Speaking Skills**

Similar to personal skills but to multiple people at once. Speaking in front of crowds is statistically one of the most frightening things for a majority of the human race. And even

if you are comfortable speaking in front of a crowd, that doesn't necessarily make you good at public speaking. The vast majority of candidates will need work in this category so it's important to have a trusted friend (or staff) who will be brutally honest with you about your public speaking skills right away.

There are multiple layers to this assessment. Can you speak without notes? Can you speak without stuttering or saying "um" after every word? Do you blink too often or make odd faces when listening to a question? What do you do with your hands when explaining something? Can you remember names easily? Did you keep your remarks politically correct? Did you stay on message and explain your platform correctly? There are many aspects to public speaking skills.

For the fastest improvement in this department, you must literally practice in front of a mirror. Again, most voters will never meet you or have a real conversation with you. Every opportunity you have to speak in front of a crowd or to the media could be your only chance to win that vote. You would be wise to have your trusted friend record every public speaking event you have and watch it together with notes.

- Appearance

Like it or not, voters and organizational leaders might judge you on your appearance, even if they never say so. If you are serious about winning every single vote, you should have a friend assess your professional look. Not your mom or your spouse. Someone with no bias.

If you don't have a professional look or any idea how to buy a professional wardrobe, those are all things to consider in the assessment. Other things to consider are hairstyles. Men are too often reticent to shave unprofessional looking haircuts and facial hair. Conversely, women are too often wrongfully pressured to "look pretty."

Universal tips generally include no facial piercing, unusual hair colors or controversial graphic shirts. This applies to personal outings where you might be photographed during the campaign.

It should be explicitly noted, however, that we fully encourage religious and cultural attire as it applies to your life. We also reject all sexualization of women for the sake of winning campaigns. This assessment should be about maximizing your professionalism without compromising your identity.

- Questionnaire

The assessment phase of your potential candidacy should stretch far beyond the aforementioned subjects. Your influence within the community, financial resources, current career, existing networks, criminal history, personal obligation and many other things must be considered if you wish to avoid a traumatic experience. Appendix A at the end of this guide will help you dive deeper into your personal assessment.

## Building Your Team

Whether you decide to run for office now or in the future, you must remember that politics is a team sport. If you win, your job will be to represent other people in government, not yourself.

The same can be said for your candidacy. As you develop a winning message, built on core values and the needs of your constituents, you are the leading voice for those that share your policy goals. That does not, however, make you an expert in campaigns or policy.

Candidacy is about being humble and delegating tasks to people you trust.

If you are not able to take criticism or directions and lack the ability to trust your staff, you should reassess your leadership skills and contemplate working for another candidate before running yourself. This section will teach you about building your team and delegating responsibilities.

- Campaign Cabinet

Candidates and campaigns are not the same thing. The candidate is the face of the campaign and ultimately the person with the most to lose. But you should not take on too many tasks within the campaign or you will face deficits in other areas of your candidacy.

Start your campaign with a small group of trusted friends and family who can help you make decisions in the early stages of the assessment period. This will be your support group. They will help you debrief major events, and you can bounce ideas off of them to hear multiple perspectives.

Some people call this an advisory board. This group will act as a healthy and supportive network when you get stuck on a heavy decision. This group should meet regularly until the end of the campaign and should be expanded to include your key staff members as the campaign develops. They will be your primary volunteers, donors and most dependable allies.

- Consultant/Campaign Manager

Major campaigns have consultants and campaign managers. The consultant designs a winning campaign strategy from professional experience, and the campaign manager executes the strategy. In most local races, however, you will have one or the other.

Some consultants will offer to design a strategy without ongoing oversight or direction for a standard fee. It is then up to the candidate and campaign manager to execute as they see fit.

Regardless of your financial resources, there should be someone who is not the candidate in charge of scheduling, media and field operations. There are rare examples of candidates who have won local races managing a majority of the campaign alone, but the odds are low and the stress levels are high. Recruit one of your cabinet members to manage the non-candidate aspects of your campaign until you have enough money to pay a staff member. This will save you time and allow you to stay focused on candidate duties.

- Treasurer

Under no circumstances should the candidate be her/his own treasurer. It is hard to overstate how important the treasurer is in a campaign. This person should be solely focused on handling money.

The treasurer should be a detail-oriented person who is willing to spend long hours documenting every penny that comes in and out of the campaign. Not only will the treasurer need to intake all forms of money that flow in from your fund-raising but also will need to pay your campaign expenses in a timely manner, transfer various types of deposits from account to account, document the dollars in an accounting program, visit banks, monitor the mail and spend hours filing out complicated fund-raising compliance documents.

There are professional treasury services for candidates that make things fairly simple if you have the extra cash, but the primary lessons here are: DO NOT take this role on yourself or delegate the treasury work to an intern, a well-intentioned family member or any other staff who already has major duties.

- Finance Director

This position is used primarily in major campaigns and likely will not be needed for local races, but it's important to understand the difference between a treasurer and a finance director. A finance director's sole responsibility is to manage fund-raising efforts. This would include developing and managing a donor database, coaching the candidate and mandating call time, implementing online solicitations and coordinating all aspects of in-person fund-raising events.

- Your Role in the Campaign

As the candidate, you are the majority stakeholder of the campaign. You own a majority of it but not all of it. Your perception of how large that majority is will depend on whether this campaign was your idea to begin with or if you were drafted to run by a member(s) of your community. But you must avoid micromanaging every aspect of the campaign.

The members of your cabinet and staff are all stakeholders as well and will take ownership over their respective duties. Immerse yourself in the duties of being the candidate immediately after you finish building your team. Your job is to trust your team, improve your skills, be visible, be available, attend everything, stay on message, ask for money, ask again, manage stress and talk with voters.

If you are not knocking on doors, you will lose. Begin scheduling time to walk as early as 12 months before Election Day and increase the frequency as you get closer. You should be knocking on doors more than two nights a week at the 90-day mark.

- Who's in Charge

Based on the majority stakeholder analogy, it is fair to assume that you are in charge. But this is not totally true. As the candidate, you have veto power over major decisions in



the campaign. But your schedule should be too full of public appearances, interviews and door knocking to actually be in charge of the day-to-day operation of the campaign.

If this is not the case, you should reassess your commitment to the candidacy role and prompt your team to fill up your calendar. Small campaigns might involve only the candidate and one volunteer or part-time staff, in which case you will have more responsibilities to assume. This scenario is not ideal and can be avoided with interns, increased commitment to fund-raising or a stronger cabinet.

- Volunteer Base

As you begin sharing your message and making public appearances, capture the contact information for voters and organizational leaders that commit to supporting your campaign. As you build the database, regularly communicate with them about ways to support the campaign. Volunteering, donating and attending fund-raisers should be at the core of every communication. Posting events of social media platforms is not an effective substitute for direct communication with your core supporters.

Often, you will need to directly follow up with your core supporters to secure a donation or a volunteer shift. A volunteer base must be appreciated and nurtured by the candidate. You will be shocked and humbled by your core supporters' donations of time and money. Make them feel important and appreciated by feeding them great food and personally thanking them.

The math is simple. If you have a large and committed base of core supporters, you will have more donations and volunteer shifts for the campaign.

## Candidate Development

As time and opportunities go on in your campaign, your candidate skills will improve. But the voters in your district need to trust that you are the best candidate on the ballot to secure victory. To be the best, you have to practice and commit yourself to being the best.

This campaign will feel like an intense semester of college. You will learn about yourself. You will learn about other people. You will learn about problems you never knew existed. There will be tests. There will be multiple subjects. And yes, there will be homework. This section is about scheduling time in your calendar to develop your skills as a candidate.

- Speaking Skills

Even if you start with good speaking skills, specific mannerisms can only be revealed by watching yourself speak on video. Most of us never watch ourselves speak, especially during times of concentration. Record and watch yourself often to identify your mannerisms.

Many beginning public speakers tap their feet, keep their hands in their pockets too often, make odd faces or use elaborate hand motions. Watch other elect officials speak and focus on how they utilize their hands, feet and face when listening and explaining in public. Don't forget to practice in front of a mirror.

- Winning Message

After your strategy is complete and your platform is developed, your campaign should focus on developing a winning message. A winning message is different to every voter and every organization. Different parts of your platform will appeal to different demographics.

Your campaign's ability to highlight relevant pieces of your platform to the correct audience will be crucial. This requires homework and practice. As you develop this skill, you should refrain from attempting to answer questions that you simply are unfamiliar with. You are not supposed to be an expert in every field. You are supposed to be honest and prepared and willing to learn.

- Message Discipline

In the beginning of your campaign you will mostly spend time introducing yourself, your core values and your intention to run. After the honeymoon phase, you will be offering more details about your platform through your winning message skills.

The challenge to this skill is staying "on message." It's easy to get sidetracked into a voter's personal story or begin answering irrelevant questions from the audience. Message discipline is the skill of returning the conversation back to your winning message.

This is especially true with media interviews. Any topic or question that is outside the scope of your desired office is not worth the time it takes to answer it. Inquiries about hypothetical past or future votes are equally irrelevant. The toughest part about this skill is the segue from irrelevant topics back to your winning message without being

dismissive or rude. It is completely acceptable to thank the questioner and admit that you have yet to commit on a specific position. But you should not lie or offer opposite answers to the same questions at different events to please the crowd. You should also avoid any form of plagiarism or other unethical messaging to win votes.

- **Media Savvy**

Navigating the media as a candidate is a unique and thankless skill. Even if you have improved speaking skills with a winning message, members of the media can be aggressive when seeking a soundbite. It's important to befriend members of the media so you can help them accomplish their story but with the message you intend to have recorded. It is not uncommon for candidates to have cell phone numbers and emails to specific reporters that cover local campaigns. But they are not your friends. Do not give them any information they have not asked for.

Remember, the media exists to offer nonpartisan facts about local campaigns. They do not exist to elevate your platform. If you offer vague details on future policy, they will ask for specifics that you might not be prepared for. You should be mostly focused on maintaining a professional appearance with a winning message.

All of these lessons are equally applied to social media. In addition, your personal social media activity will be scrutinized. Take some time to review your personal posts before it is too late. Refer all of your supporters to your campaign page where they can like your pictures, donate and find volunteer opportunities.

- **Controlling the Narrative**

What is the story other people are saying about you and your campaign? Being able to control your story and how the media tells your story is important. This is less about your winning message and policy proposals and more about the first chapter of your political biography.

Who are you? Where did you grow up? How did you grow up? How was your home life? Where did you go to school? Where do you work? What is your professional expertise? What motivated you to run for public office? Voters can be incredibly drawn to a candidate's personal story, even if the candidate is a novice.

Developing and controlling your narrative can be a powerful tool when connecting with voters. You might not agree on every issue, but at least you remind them of someone they can identify with. If you lack a narrative, the media and your opponents will develop one for you.

Think about who you are and what elements of your personal story are the focal points of your motivation to seek public office. You should tell your story every single time you speak to a crowd. Every time! A grand majority of voters that see you speak at any given event will be seeing you speak for the very first time. Repeat your story until everyone knows your narrative.

## Finance

The financial responsibilities that come with running for office are rigid and cumbersome. Each level of government has distinct legal requirements pertaining to campaign finance laws. The laws are intended to increase public transparency and prevent corruption by limiting donations from businesses and individuals. This section will review campaign finance and why it's best to delegate these tasks to a professional.

- Filing

The formal paperwork legally required to run a political campaign can be overwhelming. Just appearing on the ballot without raising any money at all will require a bundle of different forms and affidavits.

In the beginning, you will need to file paperwork with the county in which you are running and the city in which you are running (if applicable). You will also need to apply for an account with the Fair Political Practices Commission that is tied to your newly established bank account, designed specifically for political dollars for this campaign.

After you get your FPPC number, you can begin raising money. Every penny that enters and exits your campaign account must be communicated with to the FPPC on a scheduled basis. We have attached an FPPC schedule to the back of this guide as Appendix B.

The filing required for the FPPC becomes more frequent as the election gets closer. Eventually, there are requirements to report large donations and expenditures within 24 hours of the money transfer.

Non-monetary donations and expenditures must be reported as well. So if a friend who owns a restaurant hosts a fund-raiser for you and provides his location and food for the event, you are required by law to determine the fair market value of that contribution and report it accordingly.

This is the surface level. You will ultimately need to file paperwork with the Secretary of State, IRS and local government more often than you care to remember. And there are financial consequences that you will be personally liable for should you ignore the law. Enhanced trainings are available on campaign finance reporting should you be interested in learning more on this part of campaigns. If you are a candidate, hire someone with experience and get back to knocking on those doors.

- Bank Account

As previously mentioned, your campaign funding must be explicitly separate from your personal money. You are welcome to donate money to your own campaign, but you must legally have separate bank accounts and the campaign account is subject to FPPC regulations and reporting.

Once you have donated personal money into your campaign account, it cannot be spent on personal purchases unrelated to your campaign. You will also likely find that your existing bank or credit union does not offer specialty accounts like those required by the FPPC. There are a limited number of banks that offer this service. A professional

treasurer will likely have all of these things covered and give you a set of instructions to get started.

## **Fund-Raising**

The most difficult part of being a candidate is asking friends, family and strangers for money. Regardless of your personal story, winning message and endorsements, you will not be able to mount a serious campaign without fund-raising.

There might be some donors so drawn to your message that they offer a major contribution, but that strategy alone will lead to certain failure and an under-resourced campaign. In addition, a mismanaged campaign that does not have budget discipline will also end in defeat and sometimes personal debt.

If you plan to win, you must grind through the bitter reality of asking people for contributions. You must also swallow the fact that many donors will make commitments and forget to write the check, triggering the need for you to make that awkward follow-up call. This section will provide an understanding of the budgeting process and how to fund-raise.

- **Budget**

As previously mentioned, one of your first priorities will be to create a budget. Make sure to have an eraser nearby. Your budget must take into consideration things that you never planned for or might have never heard of.

Creating a realistic budget should be heavily dependent on your field plan, which should be created with an experienced campaigner that has access to a voter database. You will need to factor in filing fees, late penalties, business cards, pictures, Web site development, staff considerations and field plan components, including food for your volunteers. After you include all of that, add an extra 20% for unforeseen expenditures.

Create multiple layers to your budget. Start with a bare-bones budget and work your way up to a dream budget. Use this as your motivation to keep asking for money. A sample budget is included in the back of this guide for reference as Appendix B.

- **Staff versus Field versus GOTV**

As you begin to build your team and subsequently fund-raise, you should consider the importance of your budget priorities before hiring too many staff. You will need adequate funding for the field operation and the final push close to Election Day referred to as Get Out The Vote (GOTV).

It is not uncommon for candidates to spend too much money early and realize their donors are out of available cash during the final push. Hire your team accordingly, offer win bonuses instead of raises and stash enough money for a final mailer or major volunteer effort during GOTV.

- **Personal Network**

The best place to start fund-raising is within your personal network. Your friends and family know you and will likely offer some assistance to get you started. Open your campaign account with your own contribution.

After that, it's time to break open the contacts in your cell phone and identify 10–20 friends and family you can immediately ask for a contribution. This first round of calls will be humbling yet beneficial to your candidate development. An e-mail or text will not help your development and is disrespectful to the person you are asking. Plan to write personal thank-you notes and mail them to early donors in your network.

Make these donors the first people in your supporter database and invite them to every event in the future. You will almost certainly need to ask them for another contribution in a few months.

- **How to Ask for Money**

There is no secret to asking for money. When people believe in you as a person, candidate or leader, they will understand the gravity of your humble request. You will eventually build a mental script that elaborates on how important your campaign is, what issues you are fighting for and how expensive it can be to run a successful campaign.

If you want to make your ask as easy as possible, always have an upcoming fund-raiser or campaign operation that is forcing you to meet a financial goal. Jokingly blame your staff for pushing you to meet the goal. Bring up your opponent's fund-raising totals with disbelief.

Remind the donor that even though you seriously dislike fund-raising, your policy proposals are too important to die because of a lack of funding. If your donor can only contribute a small amount right now, ask if they would consider a monthly donation.

There are two golden rules when asking for campaign contributions: You have to follow up to get the money, and you have to plan on asking most donors to make another contribution at a later date.

- **Call Time—What is it?**

“Call time” refers to dedicated hours in your weekly calendar designed to map out potential donors and cold call them for contributions. This is the only acceptable substitute for knocking on doors, although you should be doing both every week. Pick one night every week for call time and focus on the supporters you met last week or a new batch of family and friends.

- **Fund-Raisers**

Instead of planning a few really big fund-raisers, host multiple small fund-raisers every month. The best fund-raisers are hosted by a donor who will provide the food and location for the event, while inviting their network to meet you. This is a good suggestion for that family member with the nice house that doesn't like using the online donation tool.

Successful fund-raisers are well promoted, well-branded, offer good food, have an open bar and have the expenses paid for by a hosting donor. Don't forget to have a sign-in table to collect information for your database.

Your fund-raisers should not include any significant hard costs outside of food and alcohol. For instance, don't buy an order of campaign t-shirts that will be offered to every donor at the next event. This is a waste of money. Your donors want you to spend their money wisely and win the campaign.

- **E-Mail and Web Site**

Small contributions via e-mail are becoming a significant part of national campaigns but have yet to make a major impact at the local level. Still, an extra \$500 for that GOTV push would be nice.

Active donors in national campaigns will often seek to help their local candidates with small, recurring donations. To capture this type of donation, you should set up an online account (e.g., ActBlue) at the beginning of your campaign and make sure to prominently include the link in all of your campaign materials, especially the Web site. You will need a strong database to capitalize on this form of fund-raising. A short but frequent newsletter will go a long way in this department as well.

## **Field**

A "field" plan refers to planning targeted conversations with voters. A good field operation harnesses the power of a campaign's base by turning supporters into volunteers, and volunteers into activists and leaders. There are several ways to have direct, personal contact with prospective voters. This section will review the elements of a basic field operation. A list of field plan best practices is included in the back of this guide for reference as Appendix C.

- **Win Number**

The very first thing you must determine when mapping out a field plan, is how many votes it is going to take for you to win the election. This is called the "win number". The best place to start when determining your win number is to look up the most recent election for the office you are seeking and find how many votes it took for the incumbent to win. Election results, including vote totals and other helpful demographic information are public record and can be found at your city or county clerk's offices. It is important to note that every election has different variables that affect voter turnout. You should consider the following when determining your win number: Number of candidates in previous race, number of candidates in current race, possibility of a redrawn district after the Census, possibility of a special election in previous race, voter participation fluctuation in Presidential years.

- **Targeting**

No matter the campaign, you will not have the money or time to communicate with every voter. Targeting helps focus these conversations. A successful voter engagement effort will have quality conversations with prospective voters.

- *Demographic targeting.* By demography, we mean the interests, backgrounds and characteristics of certain groups of people, such as communities of color, students and new Americans. Demographic targeting is based on identifying key constituencies that tend to either turn out to vote in relatively low numbers or are generally underrepresented by elected leaders.
  - *Geographic targeting.* This means finding out where the likely voters are in your district. Data from previous elections can help identify which precincts or neighborhoods had high versus low voter turnout.
- **Voter Data**  
In order to have a field plan, you will need to know where voters are and how to contact them. All of this information is public record. You can get these records at your county or city clerk's office, but the raw data can be difficult to manage without the correct software. In smaller races, you may have success using Excel to house the data and target voters, but creating geographic canvassing lists requires experience. We highly recommend consulting with a professional when acquiring and organizing your voter data.
  - **Canvassing**  
Statistically, the most effective form of communication is peer-to-peer. Conversations that happen in person are the best of the best. The process of targeting a geographic or demographic population and organizing an effort to have personal conversations with them is called canvassing. The advantages of canvassing (compared to other forms of voter contact) are as follows:
    - It is more personal and therefore more effective. Even if the person is not home, you can leave a short personal note at their door (e.g., sorry I missed you).
    - It gives you the ability to obtain much more information.
    - It provides the basis for more extensive follow-up.
  - **Phoning**  
To maximize your field plan, your campaign needs to plan on making phone calls to voters and your base of supporters on a regular basis. While phone calls are not as effective as they have been in the past, you can still reach voters faster than you can by canvassing them at their doors. This method of voter contact is most commonly utilized by volunteers who may feel more comfortable calling voters than canvassing voters. Phoning is effective for voter contact, volunteer mobilization and event attendance registration.
  - **Texting**  
Communicating with voters by text is a growing trend but still the least effective method of a field operation. Frequent voters receive dozens of text messages from multiple campaigns and generally respond to very few. Still, the quantity of texts you can send in a short period of time makes this an inexpensive part of most campaigns. If you are planning to include texting in your field plan, be sure to budget for a texting software that is designed for campaigns.



## Branding

Successful campaigns maximize visibility of the candidate and the platform. Think of branding as the digital version of your winning message. Research tells us that voters need constant reminders about when to vote, why to vote and who to vote for.

Considering that any candidate should have a strong history of voting, you will know that ballots are generally long and confusing. The likelihood that voters will remember your race and your name will come down to how many times they have been touched by your campaign, both personally and digitally.

This is why branding is so important. While you are on the campaign trail raising money and talking to voters, your campaign needs to be prepared to touch voters through a variety of media channels to keep your name and platform relevant. The quality of your branding efforts will determine how successful those marketing appeals are. This section will cover the various elements of building your brand.

- Logo

Having a logo is important for your brand. Having a complicated logo is not. Do not spend too much time on this. Review campaign logos and lawn signs from successful elected officials in the area and design something similar. Make sure to identify a simple color scheme that you will use for all of your marketing elements.

- Pictures

Your social media channels, Web site and outreach materials are going to need a few good pictures to use for the next several months. You will likely need a profile picture, a wide shot with constituents, an action photo with industry leaders and some family photos.

Your photos should include a mix of both professional and casual attire. No need to break the bank on a photo shoot. Find a friend who does photography on the side with a decent camera. If you are short on family, business relationships or constituents, ask a few friends to play the part and stage a photo shoot on a weekend. If you do this right the first time, you will be set for the entire campaign. Once completed, be sure to host your photos in a specific place for media access.

- Social Media

As previously mentioned, your personal social media channels should be reviewed ahead of your race and potentially placed on private during the campaign. Professional campaigns have branded social media channels that reinforce the platform and core values of the candidate, while promoting campaign events and donation opportunities.

Your campaign doesn't need to have every type of social media. Facebook is the only one that is universally recommended. Twitter is secondary. The others will waste your time. Facebook live is a great tool to record and promote press conferences and campaign events without relying on the traditional media.

- Newsletter

Do you need a newsletter? No. This is an optional tool based on the type of race you are in. Many successful campaigns do not use newsletters, but they are helpful for traditional media outlets and voters that get more communication via e-mail than social media.

Newsletters can be time-consuming, and their success relies on how many e-mails your campaign is collecting. If you don't have the staff or volunteer capacity for this, spend your campaign efforts elsewhere, but keep in mind the potential for recurring small dollar donations via e-mail.

- Mailers

Regardless of how many times you walk your district and knock on doors, you will only ever speak to a fraction of the total voting population. Some people work night shifts or weekends, whereas others do not like to talk with strangers at their door.

This is why successful campaigns invest heavily in mailers. Sending mail to hundreds or thousands of people is expensive. You should work with a professional on your mail program in the budgeting and design process.

Larger campaigns might send 10–20 different mailers to specific demographics with targeted messaging on each one. It might be necessary to consider second-language mailers depending on your district. Smaller campaigns might design only two or three mailers and use one of them when knocking on doors and reserve the others for Election Day reminders.

Typically, you want at least one mailer to introduce yourself as a candidate and one to remind the voters closer to Election Day. It is crucial that you work with experienced professionals for this aspect of your campaign or your final product will not appeal to the correct voters.

- Web Site

In today's marketing world, Web sites are primarily used for static information that doesn't change, whereas social media is for ever-changing updates. You should definitely invest in a Web site, though it is not mandatory.

For successful campaigns, a Web site serves as the host for all of the content that your social media channels promote. This includes your platform, personal story, campaign pictures, press releases, newsletters, calendar of events and donation page. Your content needs to live somewhere and digging through your social media channels will lead to fewer donations and less marketing value for the campaign.

Web site developers are plentiful and can design simple, inexpensive campaign Web sites. Make sure to keep the Web site basic and adaptable to mobile phones.

## Campaign Support

To mount a successful campaign and validate the countless hours, days and months that you will spend as a candidate, you must build a foundation of support that grows exponentially over time. You will never reach every voter. In addition, you will be told by dozens of people that they are supporting your opponent regardless of what you do.

Successful campaigns ask for and receive crucial endorsements from community leaders, organizations and media outlets. These endorsements will add legitimacy to your candidacy, and many will amplify your campaign through their own marketing tools.

As you contemplate your candidacy and the quality of your campaign, remember that you could ultimately lose and need to try again down the road. Be humble when seeking support, and avoid burning bridges along the way. Your opponents in this campaign might someday be your biggest supporters. This section is about building a foundation of support for your campaign.

- Family

Your family should be seriously consulted before you run for office. There are multiple factors to consider here. Your spouse or significant other (if applicable) should be your No. 1 supporter. She/he doesn't need to work on your campaign but should be fully abreast of the time commitment required of a candidate and ultimately an elected official.

If you are single, consider how your future as a public figure could affect your personal life. All of the same considerations should be applied if you are a parent or planning to be a parent in the short term.

As a newcomer in the political arena, every extra meeting or public appearance you can make will earn you more votes and money. Over time, your foundation of support will grow but your available free time for family and personal life will not relax until after the election.

If successful, your post-election free time will be dedicated to learning about governing for the entirety of your first term. It is absolutely crucial that you do your best to avoid a personal meltdown with your family or yourself during the campaign. If you receive anything less than enthusiastic support from your closest family members, consider a different year to make your move.

- Endorsements

The mark of a trusted candidate and quality campaign is a list of respected endorsements from community leaders, advocacy organizations and elected officials. If you are a newcomer with little experience, your list might need to contain individuals in respected professions, as the more experienced candidates might have better relationships with top endorsers.

Start by drafting a list of organizations, elected officials and community leaders that you think might endorse in your race. Attend events to introduce yourself, and ask for a chance to meet at a future date. Follow up by e-mail and by phone as soon as possible, and be persistent. Think of this process like trying to land a job interview.

Often, endorsers will tell you right away that they have endorsed your opponent. Do not let this deter you. Meet with them anyway, and pick their brain. You might need their support in the future. They might also have suggestions for other organizations or leaders that are not on your list.

Organizations that commonly make endorsements will generally have an interview process and a questionnaire based on their advocacy issues. You should meet with leaders and members of the organization in advance to learn about their issues beforehand.

It's important to note that relying on verbal endorsements from individuals is not a good practice. There are plenty of examples of media outlets writing stories about falsely listed endorsements on Web sites and mailers. This can create a public relations nightmare that can damage a candidate's credibility.

Have an endorsement form with room for a signature for every single endorser you plan to publicly list. You should ask all of your endorsers to donate or host a meet-and-greet.

- Media

In general, media outlets cover races more often than they endorse, but many newspapers will make a recommendation toward the end of the campaign based on their coverage and an interview process. Television and radio stations are more likely to host debates and candidate forums.

If you are media savvy, you will have made contact with a number of reporters from newspapers, television and radio. You should inquire about free airtime and coverage for your campaign.

Your staff should also be alerting them to campaign events and other public appearances that you have scheduled. These will likely be your only opportunities to amplify your platform through these media channels, as commercials and advertisements are generally too expensive for local campaigns.

- Employer

It is highly unlikely that your current employer will love the fact that you are running for public office. Legally, they cannot prevent you from doing so, however, unless you work for the federal government. This does not mean that you should avoid telling them. You should consult with them about any paid time off, sick time and healthcare considerations.

Plan with your employer accordingly. If you are perceived to be campaigning while at work, there will be consequences with your employer and the media. Take every precaution possible to avoid this situation. Document your time off, and be prepared to answer questions about your campaign time to both entities.

# Appendix A

## Candidate Assessment Questionnaire

1. Am I a registered voter?
2. For which political office am I planning to run?
3. Do I live and vote in the district from where I intend to run for election?
4. Have I ever been a member of another political party, or been registered as "Decline to State"?
5. What is my record of accomplishment in this district? (chronologically)
6. What is my record of accomplishment outside my district? (chronologically)
7. What are my qualifications and strengths for the office for which I plan to run?
8. How have I prepared myself to understand this office?
  - a. Have I run for this office before? If so, how did I fare?
  - b. How many times have I observed meetings of the body to which I seek election?
  - c. What issues related to this position am I familiar with? (list all)
  - d. What services/support do the voters in the district need from this office? (list all you are aware of)
  - e. List any other relevant information.
9. What is my past personal and professional experience? (academic and experiential accomplishments)
10. What is my current personal and professional experience? (same)
11. What is my potential? Describe your management style and leadership potential.
12. Do I have a field of specialty related to this office?
13. What is my passion? What motivates me to run for this office?
14. Do I have the necessary (transferable) knowledge and experience for this position? (list)
15. Am I candidate material? (speaking ability, attire, poise, experience with media, fund-raising)
16. What is my social media history and activity? Anything that would compromise your image?
17. What do I have to offer?
18. Why would people elect me?
19. Am I financially independent and able to take on this job if elected?
20. Does my business or employment allow me to continue earning my income while holding office?
21. If "yes" to Question 19, can I do justice to both elected and professional/business responsibilities?
22. Is there a conflict of interest based on my current occupation or status?
23. What is my ability to raise funds for my political campaign? What actual experience do I have?
24. What are my affiliations? (e.g., service clubs, professional associations, nonprofit charities, religious congregations, sports clubs)
25. Do I have a clean financial background (credit rating)? Have I paid my taxes in full and on time? Have I ever had a bankruptcy?
26. Are there any civil or criminal convictions or cases in my past, even if acquitted?
27. How many elected leaders and organizations know of my work as an active leader in the region?
28. Do I have the fire in my belly to pursue the workload necessary to be elected?

# Appendix B

## Sample Budget

Campaign Budget		Cost	Quantity	Months	Calculated
<b>Staff</b>					
	Campaign Manager	1,500	1	4	6,000
	Treasurer	500	1	4	2,000
	Field Consultant	1,000	1	1	1,000
	Interns	250	2	4	2,000
					17,000
<b>Field Campaign</b>					
	Voter Data	750	1		750
	Maps	100	2		200
	Phone/Tablet costs	50	10		500
	Staff Computer	1000	1		1,000
	Volunteer Food	100	2	4	800
	Gas	100	1	4	400
	Software	100	1	4	400
	Website Design	1000	1		1,000
					5,050
<b>Materials</b>					
	Mailer Design	250	3		750
	Mailer Printing	1.25	6000		7,500
	GOTV Lit Design	250	1		250
	GOTV Literature Print	1.25	2000		2,500
	Postage	0.22	2500		550
	Lawn Signs	5	100		500
	Office Supplies	100	1	5	500
	T-shirts/Buttons/Badges	1000	1		1,000
					13550
<b>Legal</b>					
	Filing Fees	500	1		500
					500
<b>Expected Expense</b>					36,100

# Appendix C

## Field Plan Best Practices

### Canvassing

#### Basic components of a canvass conversation:

- **Introduction.** It's best to use first names and mention that you are a volunteer.
- **Problem**
- **Solution**
- **Action request.** Can I count on your vote? Can I count on you to go to the polls? Can I interest you in volunteering with our effort? etc.
- **Thank you**

#### Develop your canvassing skills:

- **Confidence.** Don't be shy about knocking; you are bringing democracy to the doorstep! Think about what would inspire you from someone you greet at the door.
- **Practice.** Make sure you feel comfortable about where you are going and with your walk kit. Take the time to look at the script and practice it to make it more conversational. (This does not mean abandoning the script, but make it more personally yours.) Recall that good canvassing is about having a conversation, not being read a script.
- **Know the canvass goals.** Have a sense of who you will be talking with, the type of canvass (introduction, education/persuasion or GOTV). Be sure to review the talking points on the campaign's issues.

#### Other key considerations for a canvass:

- **Data collection.** Record all the information you receive at the door accurately, and make sure this gets back to the campaign in a meaningful and organized manner.
- **When delivering your rap, remember the following:**
  - **Maintain eye contact.** Talk to the person, rather than reading to them. Know your materials.
  - **Control the conversation, yet make it interactive.** Ask questions that engage the voter and then allow time for an answer. Remember to listen!
  - **Make sure there is an action step if the person is supportive.** If they are excited about the campaign, offer volunteer opportunities or other ways of helping out (e.g., a financial donation to your efforts).
  - **Do not go inside.** Often an excited supporter will invite you inside, but this should be avoided, both for safety and time considerations.

- **Be courteous.** Be friendly and smile at the door, step away when the person comes to the door, do not walk on someone's prize lawn, thank the person for their time (no matter what they say).

## Phoning

Volunteer phoning typically takes place in the evening (the best calling hours are 5:30 p.m.–8:30 p.m. Sunday–Thursday), and volunteers make calls at a “phone bank.” A phone bank is a location where multiple callers gather. Sometimes, the location will have an auto-dialer, which allows speedier connection of calls. An organizer is responsible for recruiting, training, and supervising volunteers.

### **Keys to a successful phone bank:**

- *Over recruit.* If you want 10 callers, recruit 20 volunteers. Inevitably, some of the volunteers will not show up or will find that they would prefer to do other work. If the phoning takes place at a location outside the campaign, be sure to have some non-poning work as a backup.
- *Make reminder phone calls the night before.* This cannot be overemphasized. If a volunteer does not receive a reminder phone call the night before, she/he is much more likely to forget or to assume that the campaign no longer needs the help. Reminder calls are mandatory!
- *Write a script that the volunteers can use.* This should be a short, succinct script that the volunteers should feel comfortable with. Once phoners learn the script and are comfortable, encourage them to use the script just as a guide and add their own words (although be sure they always stay on message). The types of scripts will vary depending on the nature of the calls.
- *Take time to train each volunteer.* Volunteer callers need specific training and assistance before beginning the calling. Explain the reason for the phoning and why it is important to the campaign. Ask the volunteer to read through the script aloud for practice, and be prepared to give feedback.
- *Be available to answer questions and respond to comments.* Phoners will often have questions once they begin to make calls. The organizer must be accessible and approachable to all volunteers and answer their questions. Check in with the volunteers regularly and ask them how the calls are going. If they are getting frustrated, tell them to take a short break and return to the calls when they are refreshed.
- At the end of the night, *be sure to ask the volunteer to sign up to come back again!*



## Campaign Scripts

You and your volunteers will need to have a clear message that articulates your candidacy and your winning message. Thus you will need to develop multiple campaign scripts to make sure everyone is using the same message with targeted voters. There are different types of scripts, each used for a different purpose and at a different time in a campaign:

- ***Voter ID script.*** A voter ID script is simply to identify if a voter is supporting your campaign. A voter ID script tends to be brief. The goal is to get through as many calls as possible with accurate IDs. A voter ID script is usually done early in a campaign and followed by “persuasion” contacts.
- ***Persuasion script.*** A persuasion script is usually used when calling back an already ID’ed voter. For example, you may be calling a voter who was previously ID’ed as undecided on supporting your candidacy. A persuasion script is a longer script that is designed to engage voters in a conversation about the issues that matter to them. This can be used to educate voters on the issues at stake in an election and persuade them to support your candidacy based on the issues that affect their lives.
- ***GOTV script.*** A GOTV script is a brief script that is directed to a voter who we already know is supporting the campaign. Of those we ID’d as supporting the campaign, we want to make sure they receive a GOTV call after ballots drop. The purpose is to urge the voter to return her/his ballot. If the person prefers to vote in person, provide polling locations and make a vote plan with the voter.
- ***Event turnout script.*** A turnout script is a brief script that gives the details of an event and asks specifically for the person to commit to attending. For those that RSVP, it is important to call again and reconfirm the day before the event.
- ***Volunteer recruitment script.*** Like a turnout script, a volunteer recruitment script asks for a commitment to a volunteer activity at a specific date and time. With a volunteer recruitment script, you will want to provide some “inside information” and make the connection between the person’s interests and taking some action (volunteering).