

2026

BLC[®]

**BLUE LEADERSHIP
COLLABORATIVE**

**Campaign Manager
Intensive Training Guide**

Blue Leadership Collaborative's 2026 Training Guide

A guide to BLC's Campaign Manager Intensive training

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Welcome to Blue Leadership Collaborative

Founded in 2018, BLC retains and trains diverse leaders to run culturally competent, winning campaigns and build Democratic majorities. We teach our participants the hard skills, soft skills, and leadership fundamentals necessary to lead and win.

When it comes to competitive campaigns, talented and culturally competent staff members are essential to winning. But there are some major barriers to building these teams, resulting in senior campaign staff across Democratic politics who are far less representative of our party and our country. From lack of steady income and cyclical unemployment to limited access to political networks and jobs and lack of individual, long-term training. It is a challenge that I faced as a young campaign manager.

Our solution is to provide full-time employment with competitive salary, benefits, and other forms of financial support; Intensive and intentional leadership development & skills training, on-demand and ongoing throughout the program; and long-term campaign career path development.

Our State Manager Program recruits talented, diverse, and passionate leaders to work as campaign managers on top-tier state legislative races across the country. As we enter our 6th year- we are incredibly proud of our alumni who have gone on to manage some of the biggest races in the country.

This program is designed to equip managers with the training, tools, resources, and support to give them a competitive edge to win and create a pool of driven, resourceful, and adaptable campaign managers who will go on to deliver Democratic victories in 2026 and beyond.

Thank you for choosing to embark on this journey. Team BLC is excited to support you, build community with you, and cheer you on to victory!

In solidarity,

A handwritten signature in black ink that reads "Justin Myers". The signature is fluid and cursive, with the first name "Justin" being larger and more prominent than the last name "Myers".

Justin Myers
Executive Director
Blue Leadership Collaborative

Tips for Success in the State Manager Program

1. Use Your Resources

Throughout this training and in the weeks and months following, we will share numerous resources that will help you on your management journey. Some of the templates and guides will save you time (your most precious resource). If there are additional resources that would be helpful to you, let us know.

2. Ask Questions

We hope that each in depth training session and discussion will spark your curiosity and expand your knowledge and skillset. As you continue to learn new things, it will inevitably raise questions. We encourage you to ask as many as you can and soak up the wisdom from our experts and presenters.

3. Be Open to Learning

Whether it's new technology, new organizing tactics, or how to manage staff; good managers are always willing to learn. Keep an open mind and be eager to gain new skills and best practices.

4. Ask for Help

As first-time managers, you will face novel challenges on the campaign trail. At times, you will need to seek the wisdom and support of your fellow cohort members, BLC coaches, and BLC staff.

5. Build Community and Your Network

We have an all-star lineup of trainers and speakers. As you glean their wisdom, please remember to follow up with them with thank you notes over email and LinkedIn requests.

6. Be Present

Getting the most out of this program requires that you are fully present during all sessions and activities. Please mitigate any distractions that will take away from your learning experience. If you are having challenges minimizing distractions; please reach out to a member of the BLC Team

Training Overview

Blue Leadership Collaborative's Campaign Manager Intensive is a four-week training program. Each week will build upon the previous week's knowledge and skill development.

Below is an overview of the training themes for each week:

Week 1 (3/9 - 3/13):

Laying the Foundation: Campaign Strategy, State Landscape and Intro to Candidate Management: Virtual training kickoff: BLC experience, 2026 Landscape, managing state races, goal and intention setting.

Week 2 (3/16 - 3/20):

Learning Your Candidate, District, and Building Your Team: What to do when you get on the ground: building trust, learning your district, managing and working with: tough candidates, caucus directors, and consultants.

Week 3 (3/23 - 3/27):

Finance and Budgeting: Building a finance plan, cash flow and Excel budgeting, best practices.

Week 4 (3/30 - 4/3):

Communications, Organizing & Paid Media: Candidate Campaign plans, launching a campaign, comms 101, field plans, paid media plans

Commit to Your Journey as a Manager

What are 3 things you would like to learn during this training?

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What are 3 ways of your leadership that you'd like to develop?

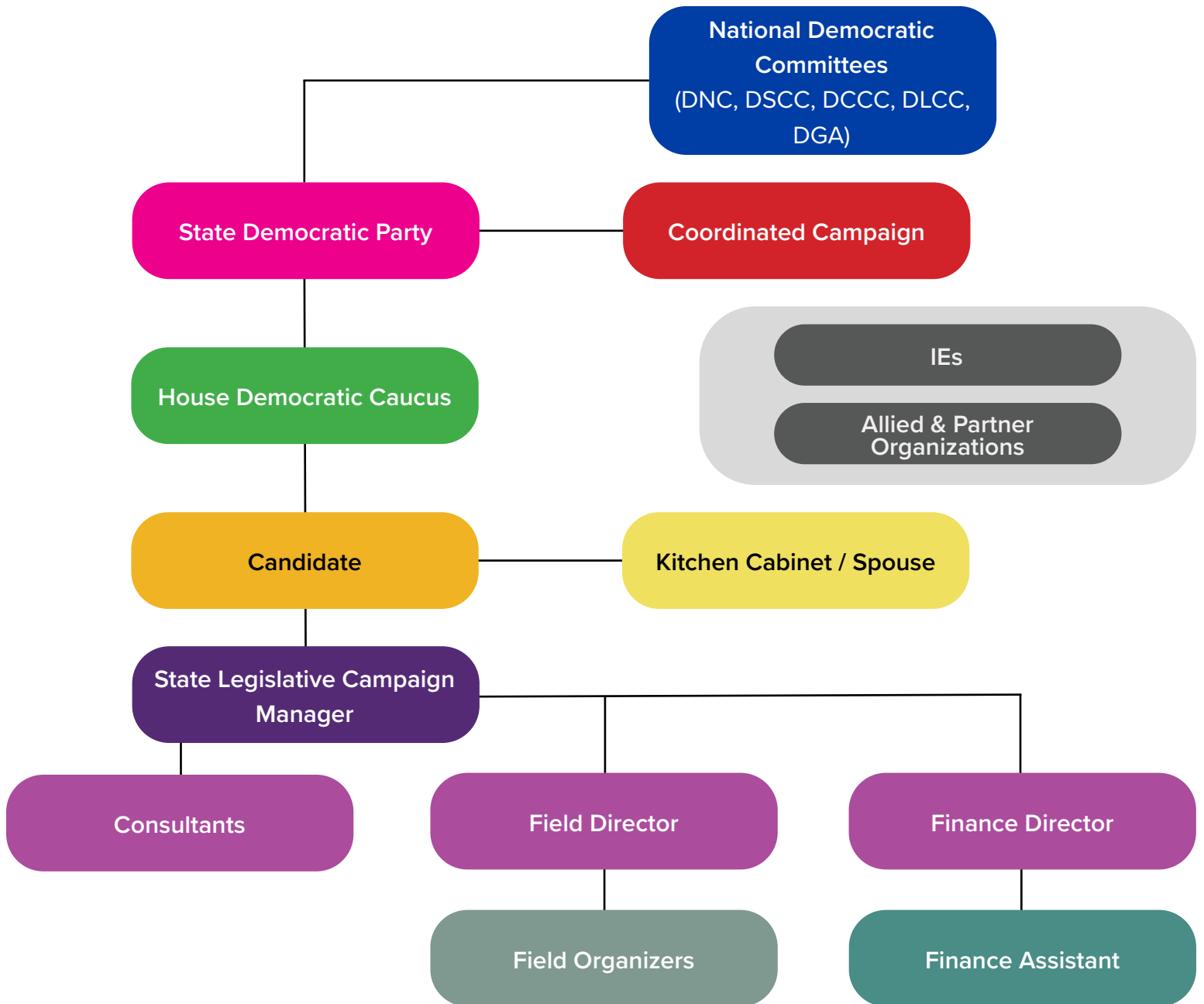
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What are 3 ways that you'd like to contribute to this community of managers?

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Campaign Overview

Candidate campaigns exist in a political ecosystem that includes issue campaigns, coordinated campaigns, state parties, national committees, and independent expenditures- just to name a few. Below is a snapshot of the democratic ecosystem.



Building Blocks of Strong Campaigns

Well-run political campaigns prioritize the following:

- **Strategy:** What is the path to victory for your campaign, and how will you get there?
 - Which voters do you need to register?
 - Which voters do you need to persuade?
 - Which voters do you need to mobilize?
 - What are the key messages that motivate each group?
 - How do you use research about your candidate and opponent to better inform your messaging strategy?
- **Maximizing partnerships:** Whether it is a top-of-ticket campaign or a democratic caucus, most legislative races aren't successful when they operate in a vacuum. Some things to think about:
 - What larger campaigns can help us with field?
 - What resources is the house democratic caucus able to provide to help me fund my campaign strategy?
- **Tactics:** What specific programs will your campaign need to run to execute the strategy?
 - Voter contact
 - Paid Media
 - Earned media
- **Resources:** What kinds of resources and tools will your campaign need to execute the strategy?
 - Dialer (fundraising)
 - Staff (Organizing Staff, Communications Staff, Finance Staff, Consultants- Polling, TV, Digital, Mail, etc)
 - Digital Platforms (P2P Texting)
 - Benchmark Poll (Polling)
 - Trackers (Polling)
- **Timeline:** When does your campaign start, when does it end, what are the other key dates and benchmarks that will drive your campaign?
 - When should the campaign commission the creation of a research book to determine how the campaign will shape its messaging and strategy?
 - When does the campaign officially launch?
 - What are the fundraising EOQ deadlines? When is filing due?
 - When is the voter registration deadline?
 - When does early voting begin?
 - When do vote-by-mail ballots go out?

Organizer Story

Organizer story is a tool to connect with existing and potential supporters of the campaign. It is an opportunity for you to share your background and experience; why you chose to join the campaign and support your candidate, and what you hope to accomplish on the campaign through building relationships in the community. Your organizer story will be one of the first things you share with new people as you hit the ground as a new campaign manager and meet new people in 1:1 and group settings.

The key components of an organizer story:

- **Introduction/ Background:** Where are you from? Describe your professional background and accomplishments.
- **Challenge:** What was a challenge you faced in life and why?
- **Choice:** What choice did you make as a result of this challenge?
- **Outcome:** What was the result of your choice? What was the impact? How does it relate to the mission and goals of the campaign and potentially the reason why this volunteer/ potential supporter is interested in helping on the campaign?
- **Ask:** How are you inviting your audience to take action based on what you have shared? Volunteer? Be a surrogate? An endorsement? Introducing you to other community members and leaders? Make sure you end the conversation with an ask.

Take a few moments to outline your organizer story below:

Introduction/Background: _____

Challenge: _____

Outcome: _____

Ask: _____

A few key reminders

- **Be adaptive:** You can choose different challenges, choices, and outcomes based on your audience. Find commonalities and make a values-based connection.
- **Research the individual and/or group prior to engagement:** Take a few minutes ahead of your 1:1 meeting to research the person you are meeting with. This will help you find connection points when telling your personal story and making an ask.
- **Be succinct:** You may only have a short period of time to share your personal story. Practice covering the most important pieces efficiently.
- **Be conversational:** This is an opportunity for you to hear from a potential volunteer or supporter. Don't dominate the conversation. Talk less and listen more. Try to strike a balance of 60/40 listening-to-talking ratio.
- **Listen:** Finding connection points between your story and their story and interest requires you to listen with intention. Volunteer? Be a surrogate? An endorsement? Introducing you to other community members and leaders? Make sure you end the conversation with an ask.
- **Highlight the candidate:** Make every effort to connect the candidate to the individual and/or group's values- Making the connection between the potential volunteer and/or supporter and your campaign is the most important part! Become familiar with your candidate's background and the campaign's message so that you are readily able to connect the dots.

Breakout Session

You will be split into randomized pairings

Each pair will take turns practicing their organizer story in the following roles and giving feedback. (10 minutes. Please take 4 minutes each for the role play, 1 minute for feedback and switch roles)

Person 1: Community stakeholder (Mayor, Neighborhood team leader, grassroots org leader)

Person 2: Campaign manager

We will reconvene and debrief (10 min)

Coffee Hour: Justin Myers

Speakers & Bios

Session Notes

What are my key takeaways from this session?

What am I still curious about?

Other notes:

Panel: The BLC Experience

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Intro to TX State Landscape - part 1

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Intro to TX State Landscape - part 2

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Intro to PA State Landscape - part 1

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Intro to PA State Landscape - part 2

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Coffee Hour: BLC Coaches

Speakers & Bios

Session Notes

What are my key takeaways from this session?

What am I still curious about?

Panel: Managing State Races

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Resume Review

Resume Do's

- Use descriptive verbs (Led, maximized, raised, designed, managed, created, leveraged, eliminated, reduced, engaged)
- Use synonyms for overused words (i.e: managed → directed)
- Quantify your experience (number of people you managed, impressive goals that your team hit, money raised, unique needs of role/ race/district)
- Add certifications and trainings
- [TRY TO] Maintain a consistent number of bullets under each job description
- Include links to your LinkedIn etc for a more information on your work experience.

Resume Dont's

- Use graphics, headshots, and color.
- Use a hard-to-follow creative format.
- Make your resume more than 1 page.

Sample Resume

CAMPAIGN & MANAGEMENT EXPERIENCE

Made to Save | Civic Nation

Washington, DC | **May 2021-May 2022**

Deputy Chief of Staff (Aug. '21-May '22), Consultant (May-Aug '21.)

- Supported Executive & Managing Directors with day-to-day management, including managing an Executive Assistant and project managing major cross-department projects, like our Vaccines at Work initiative.
- Oversaw staff engagement for team of 35, including all-staff retreats, reviews, and professional development.
- Helped design and execute an internal strategic planning process and helped manage operational budget.
- Drafted and edited funding proposals, grant reports, and monthly updates for key organizational funders.

Planned Parenthood Pennsylvania Advocates: State Field Director

Philadelphia, PA | **June 2020-April 2021**

- Managed an organizing team of 3 regional field directors, 1 digital organizer, and 8 community organizers.
- Developed and oversaw legislative campaigns, patient advocacy programs, and supporter engagement.
- Directed 2020 coordinated federal & state electoral programs, including managing \$175k state PAC budget.

Warren for President: Ohio Organizing Director

Columbus, OH | **November 2019-March 2020**

- Created and executed an ambitious field program for the Ohio presidential primary that engaged 2,500 unique volunteers and made 93,000 phone calls and 71,000 door attempts through early March.
- Managed four regional organizing directors and 20 organizers and collaborated with senior staff of seven.

Christina Finello for Congress: Campaign Manager

Bucks & Montgomery County, PA | **July-November 2019**

- Launched and managed all aspects of first-time candidate's campaign in competitive primary race in PA-01.
- Managed full team of consultants and relationships with EMILY's List, DCCC, and local Democratic leaders.

Pennsylvania Democratic Party: Coordinated Campaign GOTV Director

Philadelphia, PA | **July-November 2018**

- Planned and helped run the state party's largest ever midterm GOTV operation: 15,000 volunteers knocked 700,000+ doors over the final four days, launched by 435 volunteer leaders from 128 staging locations.
- Developed GOTV plan and led project management for all GOTV prep. Facilitated collaboration between departments, tailored voter contact programs and messaging for targeted down-ballot races, and managed relationships with key congressional, state senate, and state house campaigns in southeast PA.

Chrissy Houlahan for Congress: Field Director

Chester & Berks County, PA | **April-July 2018**

- Developed field plan for DCCC Red to Blue race & built field program infrastructure for first-time candidate.
- Hired, trained, and managed 3 organizers and activated 168 volunteers to make 51,000 calls in 12 weeks.
- Served as campaign's political liaison to local Democratic leaders and regional & national activist groups.

Indivisible Project: Midwest Regional Organizer

Chicago, IL | **July 2017-March 2018**

- Managed, mobilized, and grew 700 local Indivisible groups across Illinois, Ohio, Michigan, and Indiana.
- Organized groups to execute national coalition priorities & develop strategic plans for state-level advocacy.
- Trained activists on electoral and advocacy skills, including fundraising, earned media, and endorsements.

Hillary for Ohio | Ohio Democratic Party

Cincinnati, OH | **June-November 2016**

Deputy Regional Organizing Director (Aug.-Nov.), Organizer (June-Aug.)

- Organized volunteers in 3 Cincinnati suburbs, then co-managed 13 field organizers in the city of Cincinnati.

EDUCATION & TRAINING

Blue Leadership Collaborative Fellowship

Washington, DC | **April-July 2019**

- Completed a full-time, 20-person campaign manager training program for women and people of color, which included placement with the Federal & Gubernatorial Campaigns team at EMILY's List for 3 months.

Brown University: B.A. Political Science, American Politics focus

Providence, RI | **May 2016**

Developing Your Leadership Style

Developing your leadership style begins with a recognition of the parts of your identity, personality, and life/professional experience that shape your approach to leading and managing people. As you develop, you recognize how your style may be impacting others and how you can maximize your strengths and improve in areas of weakness.

Which Leadership Style Describes You?



Coercive: Demanding immediate compliance



Authoritative: Mobilizes individuals towards a vision



Affiliative: Creates harmony and emotional bonds



Democratic: Forges consensus thru participation



Pacesetter: Sets high performance standards

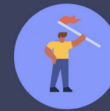
What your followers want



Authenticity



Significance



A role model



Clarity of direction



Energy and community

Session Notes

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Goal Setting & Assessments

Goal Setting is foundational to your success as a leader. As studies show, when people write down their goals- they are 33% more successful in achieving them than those who plan only in their heads.

7 Questions: What is Possible for Your Life?

The intention of these questions is to get into a mindset of possibility for your life and your vision & goals. Don't overthink these – write what immediately comes to mind.

1. What are the 8 things you value most in life?

- _____
- _____
- _____
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- _____

2. What are the 3 most important goals in your life right now?

- _____
- _____
- _____

3. What would you do if you won \$5,000,000?

- _____
- _____
- _____

4. What would you do if you only had 6 months to live?

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5. What have you always wanted to do but have been afraid to attempt?

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6. In looking back at all the things you've done, what gives you the greatest feeling of importance?

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7. What one great thing would you dare to dream if you knew you could not fail?

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What Success Looks Like as a Campaign Manager in the First 3 Weeks

Your first few weeks on the ground as a campaign manager can be the most challenging. From getting to know your district, getting to know your candidate, and putting together a campaign plan; it is important to create lists and systems that will help you to stay organized and prioritize your most important tasks.

Week 1: Laying the Foundation

This week is all about building the foundation for a successful campaign by getting to know your candidate, creating schedules for both you and your candidate, learning the district (researching the political landscape, scoping out the area)

What does success look like?

Candidate Management _____

Managing Yourself _____

Finance _____

Political _____

Other Important Tasks _____

Week 2: Relationship Building & Planning

This week will focus on building relationships through meeting community leaders, key stakeholders, and consultants; beginning to work on your campaign plan; and developing your campaign infrastructure.

What does success look like?

Candidate Management _____

Managing Yourself _____

Finance _____

Political _____

Other Important Tasks _____

Week 3: Improving and Iterating

This week will focus on fine tuning systems as you continue to develop and possibly preview your campaign plan. This is also an opportunity to begin posting jobs for key staff roles.

What does success look like?

Candidate Management _____

Managing Yourself _____

Finance _____

Political _____

Other Important Tasks _____

Panel: Getting on the Ground from a Manager's Perspective

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Learning Your District: Power Mapping

Learning your district will require that you meet and develop relationships with important individuals who can positively impact your campaign.

Power mapping is a visual tool to help you do just that. Whether it's current or former elected officials, county chairs, clergy members, donors, community leaders, or labor leaders; power mapping can help you better understand who to connect with when you hit the ground and if/how they might be able to be helpful to the campaign.

The following pages contain two charts that can help get you started.

STAKEHOLDER WORKSHEET

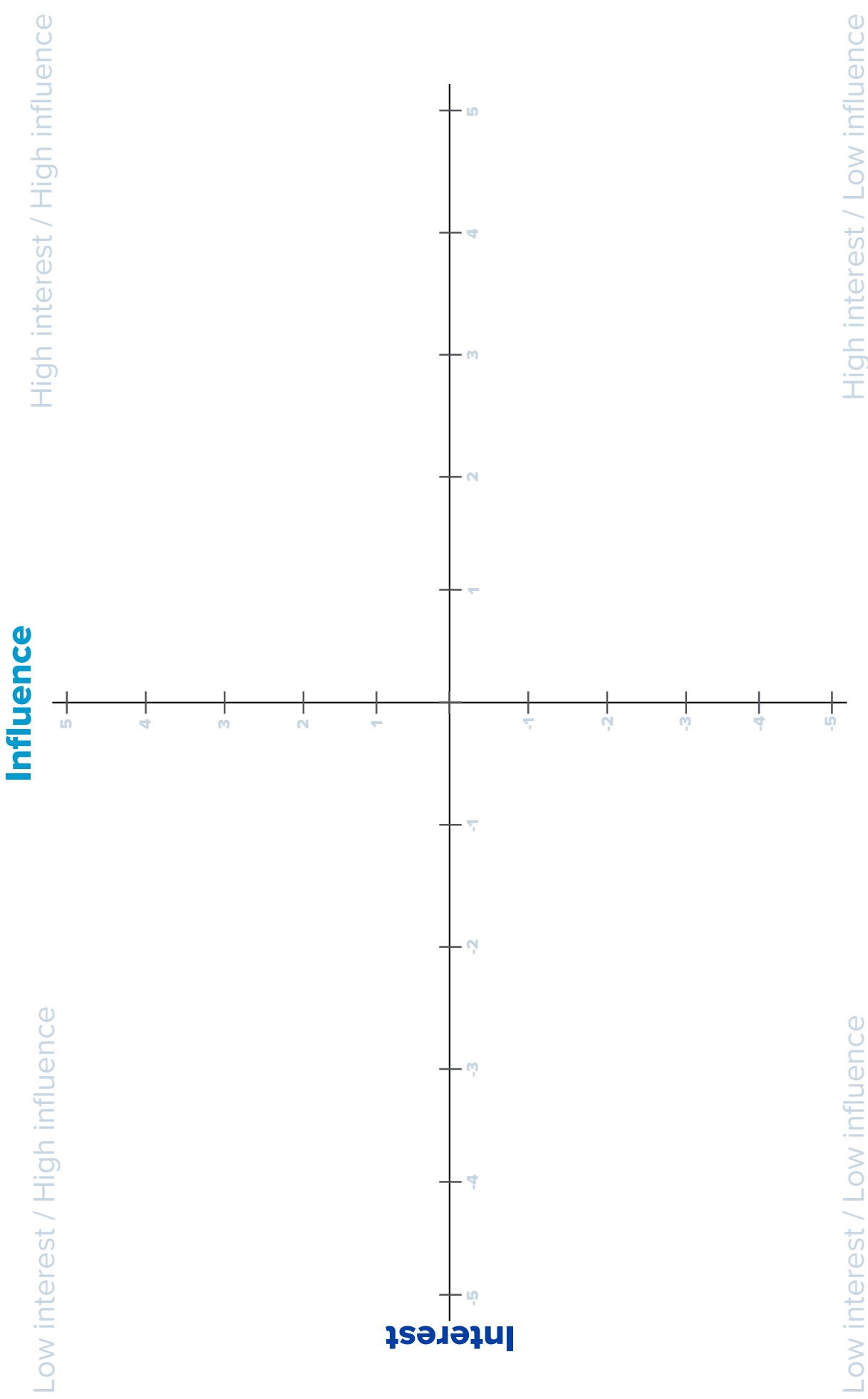
Level of Influence Scale: 1: Not Much 2: Some 3: Influencer 4: High Influencer 5: Decision Maker

Level of Interest Scale: 1: None 2: Some 3: Potential 4: Strong Potential 5: Definite

| ORGANIZATION, GROUP, AFFILIATE, LOCAL ELECTED, OTHER | NAMES & TITLES | ROLE IN DECISION-MAKING | | LEVEL OF INTEREST AND/OR MOTIVATION | CONTACT DETAILS | CURRENT OR POSSIBLE FUTURE PARTNER |
|---|----------------|----------------------------|--|--|-----------------|--|
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POWER MAPPING WORKSHEET

Those who fall in the top-right quadrant should be key stakeholders to target for partnerships. Those in the top-left quadrant should be targeted to partnerships. Must work to increase their awareness and engagement as they are influential. Map your partners and potential Partners!



Session Notes

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Building Trust with Your Candidate and Their People

Building trust with your candidate and their people (kitchen cabinet, trusted advisors, spouse, current staff) is an important part of your role as a campaign manager and will ultimately make your job easier.

Top 6 Ways to build trust with your Candidate (and their people):

1: Have a Campaign Plan

- _____

2: Get to Know the Candidate and the Kitchen Cabinet

- _____

3: Establish Regular Communication

- _____

4: Get to Know and Respect the District

- _____

5: Give Them an Assignment

- _____

6: Pick Your Battles

- _____

Managing Tough Candidates & Situations

Learning how to best work with your candidate can take weeks- especially if your candidate is an incumbent, new to politics or simply resistant to adopting the fundamentals and best practices of strong campaigns. Here are a few best practices for managing tough candidates and tough situations

Listen to the Candidate

- _____

Find out what the candidate cares about most and protect it

- _____

Talk to previous staff

- _____

Talk to the Caucus

- _____

Get buy-in

- _____

Leverage trusted advisors

- _____

Trust the process and take the wins

- _____

Intro to Working with Consultants

Your campaign team will likely include consultants, whose role is twofold: as a vendor of a specific deliverable and as an industry expert to help inform and guide the strategy and execution of your campaign. There are five main types of consultants that you will likely work with on your first race. In some cases, the caucus that you work with will have a preferred list of consultants for you to choose from. All consultants should work in concert to execute the broader strategy of the campaign.

Who are they:

- Strategic advisors
- Senior industry experts
- Well-connected operatives/ Networking opportunities

Types of Consultants

- **Media consultant:** Lead the development of paid media strategy including television ads and digital ads (working alongside digital consultant where applicable)
- **(Direct) Mail consultant:** Lead the development and strategy of paid mail pieces and literature
- **Digital consultant:** Lead the process of developing and executing digital strategy on behalf of the campaign. This may include digital ads, social media, etc, digital fundraising etc. They should work hand in hand with other media consultants.
 - Digital fundraising- online fundraising through email, SMS etc
 - Digital persuasion- targeted ads on key issues to persuade a specific part of the electorate.
- **Polling consultant:** Lead the process of developing and executing polling on behalf of the campaign.
- **Research Consultant:** Leads the development and execution of the campaign's research strategy including the creation of the self and opposition research books.

These additional types of consultants you may interact with on this campaign and on future races but are less common.

- **General consultant:** Provide general strategy support for the campaign.
- **Finance consultant:** Design and execute fundraising strategy.
- **Field consultant:** Design and execute field strategy
- **Communications consultant:** Design and execute comms strategy
- **Compliance consultant:** Prepares campaign filings and processes contributions. Their main job is to make sure the campaign is in compliance with campaign finance law.

Managing Consultants

- Introduce yourself
- 1:1s
- Weekly calls (agenda below)
- Share information/updates as needed
- Leverage their expertise for big decisions
- Let them be the expert!

Weekly Consultant Calls

Weekly consultant calls are an opportunity to meet with the entire consultant team and your staff to discuss the updates on campaign fundraising, strategy and programs (paid, organizing, etc). As a manager it is your job to develop and send out the agenda as well as do the pre-work involved to ensure the call is successful Below is a sample agenda

Agenda

I. Finance Update

- Cycle raise to date:
- Quarter raise to date:
- Quarter projection:
- COH:
- Upcoming events:
- Finance hiring (if applicable)

II. Polling Update

III. Paid Media Update

- Polling
- Direct mail
- TV
- Digital

IV. Press / Comms Update

- Any stories you're trying to pitch, any recent press clips**
- If you have a poll come back, research come back, or have any big decision your team needs to make, you should add an agenda item**

V. Organizing update

- Canvassing schedule, field hiring (if applicable), GOTV update (if applicable)

VI. Political update

- Endorsements
- Meetings
- Events

If you need to make any political decisions, this is the time

Best Practices for Running Weekly Consultant Calls

- Send Materials (Plans to review etc) in advance
- Be clear about Decision points for the call
- Research and review terms, etc for the plans that are presented/ items that are being reviewed in advance to maximize your participation in the discussion
- Offline with consults to discuss sticking points and over considerations

Team Retreat

Team retreats are an opportunity to take a step a review/ align on the overall strategy of the campaign. Each consultant team / department should present their plans and allow you to preview the plans to ensure a cohesive agenda.

Agenda

- State of the Race + Path to Victory
- Finance & Budget Update
- Polling Presentation
- Communications Presentation
- TV Plan Presentation
- Mail Plan Presentation
- Digital Plan Presentation
- Organizing Plan Update
- Political Plan (Endorsements, Etc)

Panel: Working with Consultants

Speakers & Bios

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- ---

Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Working with the Caucus

The Democratic House Caucus' goal in the state you are working in is to support all viable candidates running in legislative seats and win as many seats as possible. From strategy and candidate management support to training and financial investment; the caucus will be one of the key stakeholders and partners in your race. Developing and maintaining a strong relationship with the House Caucus director and staff will be critical to your success.

How does the caucus support legislative races?

- Strategic advisement
- Financial investment
- Data and targeting
- Vendor and consultant recommendations
- Navigating relationships with stakeholders and partners
- Hiring new staff
- Plan templates and resources

Best practices for working with the Caucus

- **Build relationship early:** In your first week as a manager you should prioritize meeting with the house caucus director and staff to establish a working relationship, meeting cadence and better understand the landscape of your race.
- **Communicate regularly about updates on your campaign:** As you establish a communication cadence with the caucus you should communicate frequently about updates on polling, strategy, fundraising, voter contact and hiring, and any other information that is requested. An open line of communication will help them support you as needed and deepen their investment in your race.
- **Use them as a resource:** As experienced campaigners and strategists, the House Caucus can support your campaign by offering recommendations and solutions for challenges on the campaign trail. Don't spend time inventing/ reinventing the wheel or getting stuck where the caucus can help.
- **Maintain a Positive Relationship:** While you may occasionally disagree with their directives or requests; finding ways to ensure that your working relationship with the caucus is positive is an important part of being a smart, strategic manager

Working with Consultants & Partners: Practice Scenarios

We've discussed how engaging consultants and partners to help strategize and troubleshoot issues on the campaign can be effective. Take a few moments to strategize how you would use consultants and partners in the following scenarios and what the sequencing would be:

Your candidate does not agree with the caucus investment standard requirement of candidates doing voter contact, knocking on 25 doors/ week. How do you leverage your consultant team to convince your candidate of the importance of and need to comply with this standard so as not to jeopardize the campaign's chance for investment?

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Your consultant team has some creative ideas about how to drive up the candidates name ID through some gimmicky ads. Your candidate is all for it! The caucus has advised against it. What do you do?

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Building a Team

Building a strong campaign team is one of the most important building blocks of strong campaigns. From full-time staff to consultants, each member of your team has a role to play in executing your campaign's strategy

What Makes Up Your Team

- **Paid**
 - Hired staff (Field/ organizing director, finance director, etc)
 - Consultants (Paid Media, Polling, Mail, etc)
- **Non-paid**
 - Kitchen cabinet (Trusted advisors)
 - Family and “friends”

Qualities of a Strong Team

- **Diversity:** How are you building out a team that reflects the diversity of the district in terms of demographics, skill sets, and experiences.
- **Shared Goals and Values:** What drives the campaign? How are those values embodied in the day-to-day work?
- **Clear structure, roles, and responsibilities:** What are the clear lanes of responsibility and reporting structures?
- **Collaboration:** How do roles intersect to achieve goals?
- **Accountability:** How do team members hold themselves accountable?

DEI: How to Hire and Create an Inclusive Workplace Equity

<https://diversity.uiowa.edu/resources/dei-definitions>

Diversity, Equity, and Inclusion are three core values at the center of productive and healthy teams and work environments. As a manager, you will lead the charge in establishing and promoting these values in your hiring and management practices.

Defining DEI

- **Diversity** is inviting people from all backgrounds and experiences to have a seat at the table.
- **Equity** is ensuring that people have equal access to partake in everything being served on the table.
- **Inclusion** is being seen, valued, and heard while you are at the table.
- **Belonging** is feeling safe to be your authentic self at the table.
- **Accessibility** is being able to sit comfortably at the table because the necessary accommodations have been made for you to do so.

Hiring Equity Checklist

DEI begins with hiring. Below is a checklist to help you prepare for your hiring process.

Preparing

- How accessible is your website for people with disabilities?
- Who are your job descriptions written to appeal to?
- How inclusive is the language used in your branding and web copy?
- Is the hiring criteria based on job requirements rather than personal preferences?
- Do you have a list of standard questions to ask each applicant to promote consistency across the candidate experience?

Sourcing

- Are we posting this job to sites or organizations that have a diverse candidate pool?
- Is there anyone in my network who may be interested in this role or be a referral source to qualified, diverse candidates?
- Is there someone who we've interviewed previously that might make a good candidate for this role?
- Would the person who was previously in this role have any referrals?

Interviewing, Screening, and Selection

- Am I being transparent about the compensation for this role in the job description and in my interview communications?
- What assumptions are being made about this applicant and their background?
- Is there too much emphasis being placed on “being polished”, “culture fit”, or “presence?”
- Are you open to hiring a candidate that can influence or add to the culture in a new way, or are you looking for someone that fits into the existing culture?
- Is it possible that the candidate is qualified in ways that are less familiar to you?
- Are there opportunities for transferable skills to come into play or for the candidate to grow into the role with training and coaching?
- What will we “miss out” on by not hiring this applicant?
- Are we placing too much emphasis on the technical skills of the job?
- What are our perceived risks of hiring this applicant, and do they have merit?
- Will we be truly living our values around DEI and racial equity by hiring this applicant? If so, how? If not, why not?

Offer

- Is this offer commensurate with the candidate’s level of experience, market value, and the value that they would bring to your organization?
- If this candidate is part of a historically minoritized group, am I offering this candidate the same salary and benefits that I would offer a white male candidate?

Onboarding

- Have I created the new hires 30/60/90-day onboarding plan?
- Has the new hire been assigned a peer onboarding buddy to help them acclimate smoothly into our company and their new role?

Retention

- Have I created a safe space for this employee to bring their authentic self to the workplace?
- Is there a scheduled ongoing time for the hiring manager and employee to meet to discuss challenges and growth opportunities?
- Does the employee have a clearly written career path and growth and development plan that’s been agreed to by the employee and hiring manager?
- Is the employee’s current salary equitable based on current job responsibilities, similar roles at the company and market rate?

DEI Related Interview Questions

- What does DEI mean to you?
- What is your experience with DEI in the workplace?
- What are some ways you have promoted or supported DEI in your previous roles?
- How do you seek to understand the perspectives of co-workers whose backgrounds differ significantly from yours?
- What do you think are the most important aspects of DEI work?
- What relationship do you see between DEI and the work that you do?
- How would your background and experiences contribute to a DEI-focused organization or team?
- How have you incorporated the viewpoints and perspectives of underrepresented groups into your thought process?

Keeping DEI at the Forefront

- To assess diversity, equity, and inclusion in hiring and management, ask yourself, “Does everyone have equal access and the opportunity:...”
- To be hired (attract and recruit)
- To learn and grow (learning & development)
- To be promoted and paid equitably (pay and promotion)

Roadblocks to DEI

- Unconscious & Conscious Bias
- Lack of Visible Leadership Support
- Resistant Company Culture
- Communication Barriers
- Cultural Misunderstandings

Impact vs Intent

- Intent does not always equal impact
- Take accountability for how your actions impact another person
- Listen to understand not to respond or defend

Workplace Bias

- Affinity or Similarity Bias: the tendency to hire and promote someone who looks, acts and thinks like you. (I.e. culture fit)
- Confirmation Bias: spending most of your time trying to confirm or prove an existing belief or thought about a candidate or team member
- Conformity Bias (Groupthink): allowing others' opinions to heavily influence your hiring and promotion decisions.
- Gender bias: associating certain characteristics or roles with gender
- Stereotyping bias: allowing a stereotype about a particular group of people to directly impact your hiring, development, and promotion decisions.

Defining Privilege

- So how do we define privilege
- Unearned advantages you get for some perceived trait you possess
- The set of unwarranted disadvantages you don't suffer under, but other people suffer under
- When something isn't a problem because it isn't a problem to you personally
- Privilege is invisible to those who have it

Identifying Your Privileges

****Give yourself one point for each area of privilege where you are a part of the dominant group****

- Ability (able-bodied and minded)
- Education (college)
- Socio-economic class
- Gender (male-identified)
- Gender Identity (Cisgender)
- Race (white)
- Religion (Christianity)
- Sexuality (Heterosexual)
- Health (access and current condition)
- Accent/Dialect ("proper" English)

Creating an Inclusive Workplace

1. Create a psychologically safe work environment.
2. Communicate with transparency and trust.
3. Be a visible ally by being supportive and amplifying marginalized voices.
4. Own your privilege and use it to advance minoritized groups
5. Lead with empathy.
6. Create a learning culture and environment where employees can learn from mistakes without retaliation.
7. Make DEI a priority by getting leadership buy-in, training employees on DEI and being consistent with modeling inclusive behavior.

Inclusive Hiring

As hiring managers; what did you learn from the DEI session that will help you to run a more diverse and inclusive process?

As you approach your hiring process. Please keep a few things in mind:

- Have a plan for the work
- Find flexibility in your plan
- Hire to your path to victory
- Keep in mind not just hiring the also MANAGEMENT that would be required to maximize their skillset

What roles are you hiring for?

- Finance Director
- Organizing Director
- Comms Director (rare on a state legislative race)
- Field Organizer

The Process

1. Posting the Job
2. Sourcing Applications
 - 2a. DEI check: Does your applicant pool reflect the diversity of your area
3. Interview 1
4. [Writing Samples]
5. Interview 2
6. Reference Checks
7. Offer

Note: You should have a standardized hiring process that shares with other hiring managers

Post Job & Sourcing Applications

** Hiring manager can choose to set applicant goals**

- Job Boards
 - Inclusv, BambooHR, Indeed, Glassdoor, TheOrg, LinkedIn, Daybook, Manatos Jobs, Traverse Jobs, Public Affairs Jobs, Democratic Gain,)
- List-servs (Previous campaigns, DMV List-servs)
- BLC Community
 - Cohort members
 - Alum
- Partners (Caucus, Committees)
- Stakeholders **

Before you proceed; check the diversity of your applicant pool. Ask yourself:

- Does the applicant pool reflect the district?
- Is there bias present in the types of candidates recruited?
- Does the current pool allow the selection of a hire that creates diversity of all types on your team?

Interviews

Round 1: Hiring Manager

- Interest in the role and the race
- Skills and experience
- Strengths and growth areas
- Management Style

*** At the end of the interview- review any expectations around relocation timelines, etc**

Round 2: Senior Leader or Candidate

- Scenario based questions. Tell me about a time when:
- Handling conflict
- Managing stress
- Managing up
- What would others who have worked with you say about you?
- What would your most recent manager say about you?

Reference Checks

- Written vs verbal*
- Should include at least 1 manager
- Unsolicited reference checks can be helpful

Red Flags

- Candidate cannot articulate 'why the role or why the race'
- References are inadequate or reflect negatively on the candidate
- Candidate doesn't ask any questions about the role, the campaign, your experience, etc
- Candidate cannot explain or give context to multiple very brief stints at jobs or campaigns. [Candidate does not send a thank you note, email, etc]

A Few Last Pro Tips

- Don't shortchange your interview process
- Interview at least 2-3 people for each role. Avoid hiring the first and only person you interview
- Be clear about expectations with the interviewee
- Trust your gut and don't be afraid to ask clarifying questions

Resources

Use the Caucus and BLC to support your hiring process

- Sample job descriptions
- Hiring Checklist
- Interview best practices
- What else?

Onboarding

Below is a sample employee onboarding checklist

- **Administrative**
 - Complete any new hire and payroll paperwork, contracts, benefits, etc
 - Share team handbooks, policies, and HR procedures
 - Email address/G Suite set up
 - Slack, Signal, or internal communication set up
 - Share on any shared drives containing key documents
- **Getting Up to Speed on the Race**
 - Background on the candidate
 - Background on the district
 - Review “Path to Victory” for this race (WIN #, persuasion targets, voter registration goals)
 - Recent polling
 - Current fundraising numbers
 - Recent news on the district
 - Key stakeholders, endorsements, etc.
- **Getting to know the Team**
 - Roles and responsibilities (org Chart)
 - Team culture
 - Upcoming hires
- **Role Specific Deep Dive**
 - Roles and responsibilities
 - Management structure (day to day manager)
 - Approvals process
 - Keys for success
- **Communications Norms**
 - Expectations on availability and working hours
 - Requesting time off
 - Meeting Schedule (Team and 1:1s)
- **Next Steps**

Managing and Developing a Team

Once you hire a great team; you as a manager play a key role in help developing them through strong communication, good management practices and developing team culture.

Here are some tips for creating strong communication

- Communication structures
 - Have a cadence/rhythm to meetings/check-ins
 - Who, how often, what is the purpose
 - Before/after a meeting
- Empower communications amongst your team
- Rules around the candidate
- Set expectations around you
-

Here are some tips for creating strong team culture:

- Define your norms and values and talk about those
- Shared goals – everyone wants to WIN
- Prioritize knowing one another
- Don't be afraid to tackle problems and admit mistakes
- LISTEN, evaluate and then be clear

Here are some activities and practices that will help foster a strong team culture

- River of Life activity
- Team retreats
- Team Mini retreats
- Trivia outings
- Bi-weekly staff dinners
- Hot seat interviews during staff meeting
- Staff outing to ball games etc.
- Fantasy football brackets
- March Madness brackets
- Create a team playlist
- Icebreaker at the beginning of meetings
- Give space for big moments in the world
- Acknowledge milestones, birthdays
- Skills test/ personality tests
- Mandatory in office time

Giving Feedback

What is effective feedback?

Feedback is:

- Information about the past given in the present, with the goal of influencing behavior or performance.
- Information that we are constantly giving or receiving, whether we intend to or not

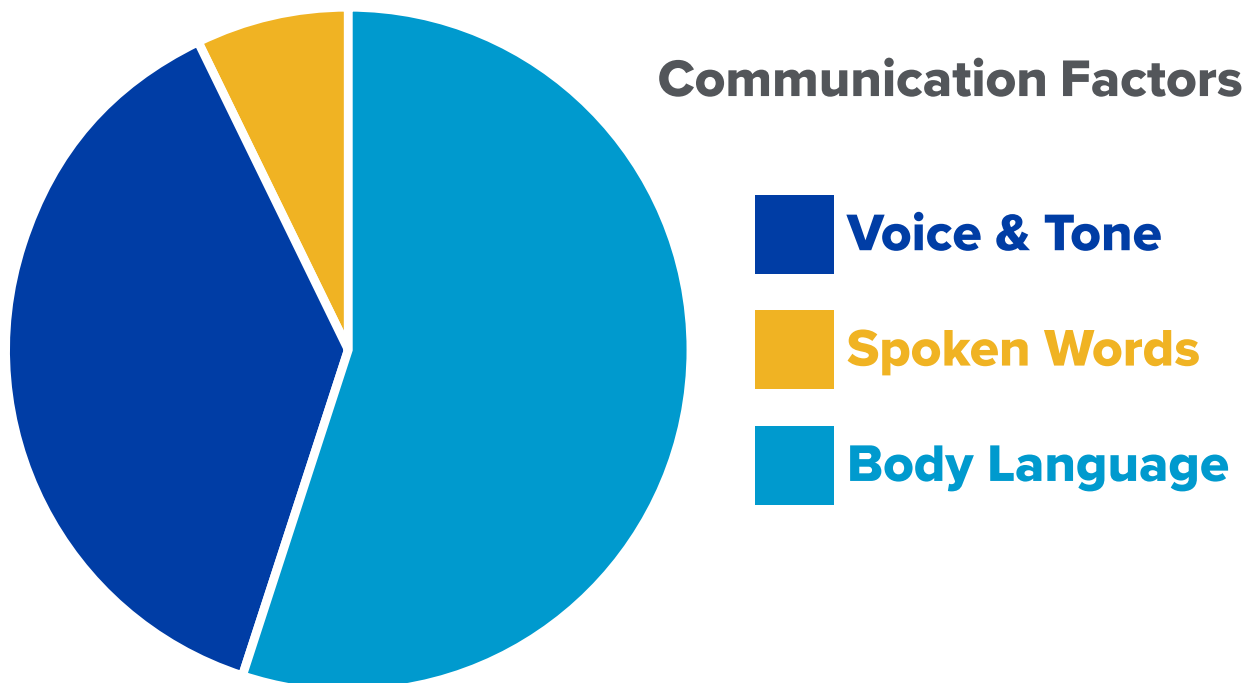
Assessment Questions

- How do you currently give feedback to your team members?
- What challenges, if any, do you have when it comes to giving feedback?
- Do you believe in a one-size-fits-all approach to feedback? Do you base how you give feedback on the individual and/or circumstances?

It's just what you say, but how you say it

The Mehrabian Theory 55/38/7 Formula

Based on research, Albert Mehrabian has concluded that only 7% of feelings and attitudes take place through the words we use in spoken communications, while 38% take place through tone and voice and the remaining 55% take place through body language.



Guidelines for Giving Feedback

- Be specific and factual; don't evaluate or judge
- Separate observations about behavior from the impact of the behavior
- Check for clarity to ensure that the receiver fully understands what's being conveyed
- Refer to behaviors about which the receiver can do something
- Provide timely feedback after the behavior

Situation-Impact-Pull (SIP)

- **S** – Situation (Here's what I saw, just the facts)
- **I** – Impact (Here's how I feel, this is how it impacted me, or how it seemed to impact others)
- **P** – Pull (for their perspective)

Additional Reminders:

- Make sure that feedback is consistent
- Use standing or additional 1:1 meeting to give feedback
- Incorporate feedback in performance review conversations

Scenario:

Gregory makes an error on every project he manages. There is no pattern or consistent mistake being made, and he has been trained several times on the processes. Use this SIP Model to address Gregory's behavior

Situation

- _____

Impact

- _____

Pull

- _____

Managing Protocols: Employee Performance

As a manager it is important to ensure that your team members are performing at their best. When an employee does not meet the standards clearly outlined in their job description and/or your campaign's code of conduct/ values statements; having a Performance Improvement (Success) Plan can make the process more fair and equitable.

A Performance Improvement (Success) Plan is an agreed-upon set of terms to course correct behavior that is not acceptable in the workplace, does not align with the values and mission of your campaign and as a result, is limiting to the employee's future on the campaign. If your team member is on state party or caucus payroll; you should check in with them to ensure that all performance improvement measures and documents align with protocols outlined by the state party/ house democratic caucus or CBA agreements.

Below is an example of a Performance Improvement (Success) Plan. You can also find a digital copy in the Google Drive

YOUR CAMPAIGN LOGO HERE

A Performance Success Plan is an agreed-upon set of terms to course correct on behavior that is not acceptable in the workplace, does not align with the values and mission of the campaign and, as a result, is limiting to the employee's future on the campaign

Each PI(S) P is for a term of eight weeks. At the conclusion of the eight-week period, ideally the employee will have made significant improvements, and no further action will be necessary. However, if the employee has not improved on the behaviors under review, further action will be required. These consequences could range from an extension of the PSP to termination.

Employee Name:

PSP Start Date:

Supervisor Name:

Specific examples of current performance under review:

| Category | Specific Behavior | Example |
|---|-------------------|---------|
| Ex: Productivity, Teamwork, Attendance, Efficiency, Attitude, Conduct, Quality of Work, Other | 1. | 1. |

Success Plan (what is expected, how it should be accomplished, and in what timeframe):

| Specific Behavior | Specific Improvement | Timeframe |
|-------------------|----------------------|-----------|
| | | |

Acknowledgment:

Employee (signature): _____

Date: _____

Manager (signature): _____

Date: _____

Weekly Review Notes

| Comments | Employee Initials | Manager Initials | Date |
|----------|-------------------|------------------|------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |

CHECK ONE:

Performance Improvement (Success) Plan satisfactorily completed on:

_____/_____/_____

Corrective Action Required

Failure to meet and sustain improved performance may lead to further disciplinary action, up to and including termination. Corrective action may be taken in conjunction with, during, or after the Performance Success Plan.

Reviewed and accepted by:

Employee (signature): _____ **Date:** _____

Review completed by:

Supervisor (signature): _____ **Date:** _____

This performance plan is not intended to be an employment contract or guarantee of continuing employment.

In using this type of document- a few reminders:

- Set regular meetings to track progress of the PI(S)P to ensure proper developmental conversations are happening.
- Document every conversation that occurs over the course of the performance improvement plan to ensure accurate records for reference by employee, manager, and HR team/ leadership

Managing Conflict

Conflict can erode team culture. Effectively managing disagreements between team members or tensions and stressors across the team helps everyone to refocus on the campaign's priorities. Because the campaign manager won't always be the one stepping in to help manage or resolve conflict; it is important to also equip team members with best practices.

Maintain consistent lines of communication across the team

- ---

Don't let things fester. Schedule 1:1 or 2:1 meetings to discuss and resolve conflict immediately

- ---

Use 3rd party when matters are particularly sensitive

- ---

Resolve fairly (and in accordance with previously established policies/ rules).

- ---

Shield your candidate from internal conflicts

- ---

Sample Scenario

Harassment Prevention Training

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Intro to Campaign Finance

Finance 101

Overview

As a manager on a campaign with a limited budget, you will likely either play the role of Finance Director and Campaign Manager or will be working with someone who is in the Finance Director role for the first time. This presents a unique set of challenges it is important to prepare for.

In this section, we will cover:

1. Who are your donors and what are their motivations?
 2. As a campaign manager, how do you manage finance staff?
 3. How do you rolodex a candidate?
 4. How can you make your events program successful?
-

1. Types of donors: who they are and why they give

There are several different types of donors:

- **Personal network:** Your candidate's personal contacts and network. These are the most likely to give.
- **Ideology:** People who care about your candidate's mission or share similar belief systems.
- **Axe to Grind:** Groups or individuals that are motivated to give to stop your opposition.
- **Power:** Groups or people that often give solely based on viability and have a formal solicitation and endorsement process.

Understanding who your donors are and how to talk to them

Understanding the motivations of the donors listed above is essential in order to craft your distinct messages catered to each group's motivations.

- Donors from your candidate's **personal network** give because they care about your candidate as an individual and are less concerned about the competitiveness of the district
- **Ideological donors** give mostly based on campaign platforms and partially based on campaign viability

2. Building (and managing) your Finance Team

Roles and responsibilities of a Finance Director

A common misconception about campaign management is that a finance director is responsible for raising the money and the campaign manager is in charge of spending the money and doesn't need to have visibility or be dug-in on the fundraising program.

Although it may be tempting to divide and conquer in that way, it is important for a campaign manager to work in tandem with the finance director, especially if it is their first time being in charge of a finance program.

If your campaign does not hit its fundraising benchmarks, or if your campaign's projections are off, there is no way you will be able to make educated spending decisions. Below, see a breakdown of responsibilities.

| Finance Director | Both | Campaign Manager |
|--|--|--|
| <ul style="list-style-type: none"> • Update Finance Plan at least several times a week • Update projections at least once a week • Send calltime follow-up • Manage finance staff, interns, and volunteers • Complete (or delegate) donor research • Update calltime tracker / send out calltime report daily • Prepare call sheets or dialer • Take detailed calltime notes/ update NGP • Manage fundraisers | <ul style="list-style-type: none"> • Update Warchest (or spreadsheet budget) at least once a week • Hold candidate accountable regarding calltime and scheduling • Staff calltime (FD daily, CM once in a while) • Manage candidates calendar • Staff candidates at events • Cash flow | <ul style="list-style-type: none"> • Input disbursements • Support Finance Director by providing professional development opportunities • In FD/CM weekly 1:1, offer feedback to projections (if your projections are off last week, why was that?) • If there is only an FD and a lack of capacity, CM should offer support by helping with donor research, events, pledge chasing, and data entry. |

Communication norms with your finance team

On a campaign, the finance director is one of the earliest hires campaigns make and is sometimes brought on before the campaign manager.

Once you have a Finance Director/staffer working, it is important to establish communication norms. Below, see a breakdown of how to structure your team communication:

Daily Communication

- **Slack room/ group text:** Early on, it is important to set up an ongoing communication channel. This can be slack, a signal room, or a group text.
- **Nightly calltime reports:** This is something the Finance Director should send on a nightly basis to the candidate and the campaign manager. The purpose of this nightly report is to provide visibility to the team in relation to the campaign's fundraising program (it should not be difficult to pull these numbers as many of them should be in your campaign's calltime tracker). This is also a great candidate accountability tool if your candidate has a habit of cutting calltime hours.
- **Sample report:**
 - Hours of calltime scheduled:
 - Hours of calltime completed:
 - Total dials:
 - Dials per hour:
 - Total raised (in the door):
 - Total pledged:
 - # Of unspecified pledges:
 - Total pledged per hour:
- **Morning meetings (phone, zoom, or in-office depending on time):** Every morning, as a manager you should hold a meeting with the senior team on your campaign where you open with any big campaign updates and then go around the horn.

- **Sample agenda:**
 1. Campaign Manager update:
 - a. Endorsement news
 - b. Upcoming events on schedule
 - c. Hiring updates
 - d. Opponent(s) updates
 - New TV ad, spending, etc
 2. Finance Director update
 - a. Calltime yesterday- who you called, how it went
 - b. Calltime today, who we are calling,
 - c. Upcoming events
 - d. Any help they need from CM?
 3. Organizing update
 - a. Upcoming canvass launches
 - b. Upcoming phone banks
 - c. Hiring
 - d. Other field needs

Weekly Communication

Scheduling meeting

You, your senior staff, and your candidate need to meet once a week to go over the week ahead, as well as add future events to the calendar.

The purpose of this meeting is to get on the same page about the schedule and decide the best way to use your candidate's time. You should have your staff submit scheduling requests and flag 'FYI's' before the meeting to go over together.

This is also an opportunity to schedule a sufficient amount of calltime for the week.

1:1 with Finance Director

As a manager, you should have a 1:1 with each staff member that you directly manage. A standing meeting like this is an essential part of building trust with your team.

You should have a simple agenda for this meeting (which both parties can add to). You should receive some time on the call to talk generally about what is going well and what are areas for improvement.

All-staff meeting (once the team grows)

Once your campaign starts hiring organizers and junior finance staff, you should have a weekly or biweekly meeting with the whole team. Organizers and junior staff are often less read-in about what is happening in other departments on other campaigns, so having a regular team meeting is a great way to get buy-in.

Monthly/ quarterly

Family fun: An important part of your role as a campaign manager is setting the team culture. A great way to do this is to host “family fun” with your whole team. This can be as simple as having a pizza party after work, going bowling, or getting a few pitchers of beer at a bar. You should have your candidate join sometimes as well.

Sample agenda for 1:1 meeting with Finance Director

For your weekly meeting with your Finance Director, this is the time for you to go over successes and challenges and is a chance to go over the finance plan and program together. As a manager, part of your job is to be a thought partner and help your Finance Director think through fundraising challenges.

1. Successes and challenges from the week
2. Calltime update (go over calltime tracker)
 - a. Hours completed last week
 - b. Number of hours scheduled for this week
 - c. Lists we are calling
 - How are these lists performing?
 - d. Any other challenges or needs?
3. Events update
 - a. Upcoming events
 - \$, \$ Pledged
 - b. Tentative events (in process of being scheduled)
 - Location, goal, timeframe
 - What else do you need to lock in a date?

4. Finance plan (line by line, go over raise #s by 'bucket' and projections)
 - a. Projections (if projections for the week were way off, you should talk about if you need to change them for the next week)
 - b. Outstanding pledges
 - \$ Outstanding
 - Plan to get that \$ in the door
 - c. Areas for growth
 - What do you need in order to increase our calltime/events/digital goal?
5. Other issues/needs?

Documents/ reports your finance team should be filling out (and you should be checking)

- **Check tracker:** A check tracker is a document, normally in the form of a spreadsheet where physical checks are imputed. This is an important system because
- **Calltime tracker:** A calltime tracker is a document, normally in the form of a spreadsheet, where the fields listed below are being tracked. Tracking calltime results is an important part of running a data-driven finance operation and identifying areas for improvement.

| | |
|-----------------------------|--------------------------|
| Scheduled Hours of Calltime | Actual Hours of Calltime |
| # Of Calls Made | # of Contacts |
| # Of Pledges | Hard Pledges: |
| Soft Pledges: | Non-Specific Pledges |
| Non-Commits | Total Call Time \$ |
| Contact % | Pledge Rate: |
| Hourly Rate: | |

- **Pledge tracker:** A pledge tracker is a document, normally in the form of a spreadsheet, that tracks all of the people who have committed to contributing to the campaign or hosting an event. This is an important tool to stay organized and track outreach. This can be added as a tab in the finance plan.

3. Guide to rolodexing your candidate

What is a “rolodex”? And What is “rolodexing?”

The term rolodex is based on the image on the right side of the page, which was an organizational tool to keep track of contacts that was common before the advent of the cell phone. In electoral politics, a candidate’s “rolodex” refers to their network, and the action of “rolodexing” refers to going over the candidate’s network with them, identifying potential donors, volunteers, or folks who can be politically helpful.

A candidate’s early calltime will be their rolodex (it is a good habit to re-visit the rolodex once a quarter as well!). These are the prospective donors that are most likely to invest in your campaign.

How long will it take?

Between four and ten hours. It sounds like a lot, but the information that you need from your candidate is very detailed. You can start with a four-hour block and add a second block if you aren’t able to block off a whole day.

Step by step: Rolodexing Guide

Phase 1: Setting the stage: Before you sit down with your candidate, you need to do some homework in order to have a speedy and smooth rolodexing session.

Step 1: Collection

In order to maximize the time you have set aside for rolodexing your candidate, you need to collect the list of people you will be talking through. The way you construct this list is by:

- Downloading your candidate’s:
 - Cell phone contacts to a CSV
 - Email contacts to a CSV
 - LinkedIn contacts to CSV
 - Facebook friend list
- Asking your candidate for their:
 - Christmas card list
 - Directories (state law association directories, children’s school directories, sorority/ fraternity directories, university alumni directories)

Step 2: Organization

After completing the collection phase, you will have a lot of raw data. It is your job to process and consolidate these contacts. Put them all in one sheet and fill out as much information as possible— you should be able to add the following information on your own before the rolodexing meeting:

- First, Last, Occupation, Employer, Cell #, Work #, Email, City, State

The other columns listed below, you should go over together.

- The Rating A-D, Network, High/Low Ask, High/Low raise, Event host?, Meeting?, Affinity, Strategy, and Other Notes (Please see fields below and template in the drive.)

The header of the spreadsheet should contain the following fields:

| | | | |
|--------------|------------|--------------|-------------------|
| Rating (A-D) | Network | First | Last |
| Occupation | Employer | Cell # | Work # |
| Email | City | State | High Ask |
| Low Ask | High Raise | Low Raise | Event host? (y/n) |
| Affinity | Strategy | Other notes: | |

What do those terms mean, and why are they important?

Rating (A-D): Rating contact on an A to D scale to determine the likelihood of giving. Someone with an “A” rating= 90-100% likelihood of giving if asked; “B”=70-89%; C= 50-69%; D= Below 50%. By having your candidate rate the likelihood of contributing this can help you prioritize the call lists.

Network: How your candidate knows this person. This is a way to group people/ sort this sheet later.

- Some examples: College, High school, Law school, Church, Family, Childhood, Workplace name, Tennis club, Neighborhood Assn.

High Ask/Low Ask: What is the maximum you think this person would contribute to your campaign if asked? What is the minimum? It is important that your candidate commits to a number.

- Example: my mother would for sure contribute to my campaign. She could at most contribute \$1000 and would at least give \$500

High Raise/ Low Raise: What is the maximum you think this person could raise from their personal networking for you? What is the minimum?

- Note: Raising can be through a fundraising event, could be from asking their law partners to give, could mean raising from their family members

Event host y/n: Would this person be a good event host target? (make sure the high raise/low raise is filled out to reflect their capacity)

Affinity: A key aspect of either this person's identity/ a key issue this person is associated with. Affinity is also another way to sort this sheet later.

- Some examples: Choice, LGBTQI+, Elected, Environment, AIPAC, J-Street, Gun violence, AAJ, Realtors Assn

Meeting (y/n): Could this be a phone call or does it have to be a meeting? For larger/ more complicated asks, sometimes it will require a sit-down. Use your judgment regarding if it would be a good use of your candidate's time.

Other notes: Anything of note your candidate says about this person. Some examples:

- Johnny's wife was recently diagnosed with cancer and is not as involved in politics anymore; but are personal friends, so should still call first and do a wellness check and potentially ask at a later date.
- Sally has two kids in college/her husband, Joe, is unemployed. Would still give something small if asked.
- Jose has a booming AI business. Will want to meet to talk about some of the issues surrounding AI. He should host a fundraiser and raise from the executives from his company/ the tech community.

Phase 2: Brain dump: After you have all of your candidate's contacts in a spreadsheet with the appropriate header, it is time to meet and go over their network line by line together!

Order in lunch, set aside a big block of time, and get working! You/your finance staff should be the notetaker and move from left to right.

In order for this to be a helpful resource, you need to fill out all of the columns, and your candidate needs to put a number for the high and low asks.

Phase 3: Execution– calling the rolodex

Now that you have a wealth of information about your candidate’s network, you now need to:

- Upload this spreadsheet into NGP (if your campaign has it)
- Make sure to create “tags” for the affinity codes, make sure to create a “rolodex” tag
- Either have your candidate call from the rolodexing document or create call sheets. Start with the “A’s” who have the largest giving capacities.

Breakout Session

Individually, go through the first 10-15 contacts in your phone and fill out the document provided in the drive. Fill it out as if you are a first-time candidate running for office. Make sure you have dollar amounts associated with each ask. You will then go back into small groups and discuss. Skip over restaurants/ businesses in your contacts.

Discussion Questions:

- What was the hardest part going through your rolodex? What was the most interesting finding?
- Who did you identify as the prospective donor with the giving potential? Why?
- What “network” categories did you identify? What affinity groups?
- What do you think will be difficult when you duplicate this system with your candidate?

Note to self:

- Any interesting findings from the group?

4. Events best practices

Overview

A fundraising event is a planned gathering of donors where attendees pay a predetermined and advertised contribution amount. The event serves as an opportunity to attract and engage a specific group of donors and is an opportunity to expand your donor base.

These events come in various sizes, prices, timings, venues, and formats. They can range from a large formal affair held at a restaurant to smaller receptions, house parties, or even lunch meetings. Events can be tailored to engage a single group of donors or a mix of different constituencies.

While event sizes, locations, and styles may differ, the underlying objective remains the same: raising as much money as possible. **It is crucial to prioritize the fundraising aspect rather than treating the event as merely a social gathering.** *Whenever feasible, aim to minimize costs by seeking support from hosts or a host-committee who can contribute goods and services in-kind.*

How much should I spend on an event?

As little as possible (five to ten percent of the projected raise amount)

How to host a successful event: a step-by-step guide:

| 4 Weeks out Step 1: | 3 Weeks Out Step 2: | 2 Weeks Out Step 3: | 1 Week Out Step 4 |
|---|---|--|--|
| <ul style="list-style-type: none"> • Determine a suitable date, time, and location • Develop a comprehensive budget for the event. • Make a list of potential host committee • Create an event tracking document to track RSVPs • Candidate call potential hosts • Set a goal for event and for each host to write or raise • Compile guest lists– ask hosts for the list of people they are planning to invite. Identify which of the campaign’s donors should be invited. • Create invitations for distribution via email and traditional mail, if necessary. | <ul style="list-style-type: none"> • Check- in with host committee– ask for an updated RSVP list, let them know who replied to you • Have staff and volunteers begin making calls to invite people to the event • Coordinate food and beverages with hosts and venue (ideally your hosts can help with this!) | <ul style="list-style-type: none"> • Have staff and volunteers continue making calls to invite people to the event • Check-in with host committee– send over updated RSVP List • Recruit volunteers for sign-in table duties | <ul style="list-style-type: none"> • Have staff and volunteers make confirmation calls • Check-in with host committee • Venue walk-through • Prepare candidate remarks |

How to host a successful event: a step-by-step guide, continued:

| Day Before Step 5: | Day Of Step 6: | After Event Step 7: |
|---|--|---|
| <ul style="list-style-type: none"> • Complete memo that includes bios, event schedule, projected raise, and remarks for candidate • Complete different memo that includes bios and event schedule for hosts • Call sign-in volunteer to confirm timeline. Make sure they have the ActBlue form, understand what information you need from remit envelopes, and are shared on the schedule and guest list. • Call hosts to go over the schedule and attendees one more time. • If the event is at a host's house, make sure to introduce them to your sign-in volunteer. • Print name tags, memos, and sign-in sheets. • Put all of the things for your check-in table into a box or bag. Items to include: sign in sheet, remit envelopes, basket for checks, pens, campaign signs (if you have them). Make sure you and your volunteer also bring your computers to the event. | <ul style="list-style-type: none"> * Morning of event: Drop off "event box" to sign-in volunteer (or give to finance staff if applicable) • ~ 1 hour before the event starts: Finance staff (if applicable) and sign-in volunteer arrive to set-up the sign-in table. <i>Be sure to text the volunteer to make sure they have everything they need</i> • Event start time: guests arrive, are signed in/get their name tags • 15-30 minutes after the event starts: Arrive with the candidate to the event (you should drive them). Make sure they thank the host right when they get there. • 5 min before speaking begins: Tell host that speaking should begin (you should start with them introducing your candidate or guest). • Event ends: Thank host, ask them what they need help with in terms of clean-up/ take down (you should drive your candidate and your helpers should make sure your host has help if they need it) | <ul style="list-style-type: none"> • Call/ text host a 'thank you' message • Call/ text your volunteer a "thank you" message • Day after event: email host a spreadsheet of the breakdown of who gave. If someone who the host invited to the event did not contribute, ask the host the best way to follow up. • 1-3 days after event: Have your candidate write a personalized thank you note to the event host and high \$ donors • 2-4 days after the event: Have your candidate sign form letter thank you notes to the smaller \$ donors. |

Building a Finance Plan and Setting up a Calltime room

In the previous section we covered:

- Types of donors: who they are and why they give
- Building (and managing) your Finance Team
- What rolodexing is and how to rolodex your candidate
- How to put on a fundraising event from start to finish

In this section we will cover two essential elements of any successful finance program:

- Building a successful calltime operation
- Building a finance plan.

1. Calltime 101

What is calltime and why do we do it?

Calltime refers to the designated, uninterrupted time for the candidate to spend on the telephone soliciting contributions.

Telephone solicitation is the most efficient way to raise money. Regrettably, arranging call schedules demands a considerable amount of staff time a. Nonetheless, it remains the paramount tool for achieving fundraising objectives, as a significant portion of your budget will be raised through phone outreach.

Who should my candidate call during calltime?

As a best practice, your candidate should start with their rolodex / their personal network circle, which we covered in the previous finance training. **These are the donors most likely to give early on.**

Once the rolodex is called through, which may end up being one day's worth of calls or one month's worth of calls depending on the network of your candidate, you will have to transition to prospect calls. Your candidate's rolodex should be engaged regularly and should be called fairly regularly– but developing new prospective donors is also an essential part of building a healthy fundraising program and reaching your goals.

What makes a good prospect call?

- A donor who has a giving history to other candidates who are similar to your candidate
- A donor who shares something in common with your candidate- some examples are:
 - A donor who serves on the same board as your candidate, but don't know each other
 - A donor that is involved with similar projects to your candidate's and are interested in similar issues that your candidate has worked on
 - A donor who lives in the district and cares about the community

What are the key tasks me and my staff need to complete in order to have a productive calltime session?

| Before Calltime | During Calltime | After Calltime |
|--|--|---|
| <ul style="list-style-type: none"> • Identify a list of prospective donors that need research • Research donors contact information, donor history, and bios. Be sure to pre-call the donor to make sure the number works • Sort through donors you researched- pick the best calls for calltime • Based on giving history and capacity, add a specific money ask to the callsheet/ dialer • Input donor info into NGP • If using dialer, upload donor research and contact info into dialer • Go through callbacks (folks who called your candidate back), people who asked to be called at a different time, and • If candidate over-analyses calls, consider giving them the call sheets/ donor information the day before calltime | <ul style="list-style-type: none"> • Keep the ball rolling– have the next call ready to dial in order to move through calls quickly • Before each call, remind the candidate who the person is, what they are asking for, and any other context from previous calls/ meetings • Take detailed notes. Did the person commit to giving? What did they talk about? • Keep the mood positive, especially if it is a long calltime session • Immediately after someone “pledges”, a best practice is for you to take the credit card info over the phone. • If pledge does not give over phone, you or your staff should send an email with the donation link to the donor from your candidate's campaign email | <ul style="list-style-type: none"> • Enter call result info into NGP • Continue to follow-up with pledges • Update calltime tracking document • Send around nightly calltime report |

What information does my candidate need on the call sheet/ dialer?

Some helpful information you should have on the callsheet / in the dialer:

- Job/Employer
- Spouse name/ info
- A biography, which should include:
 - Info on any boards they are on
 - Issues they care about
 - Where they went to college / relevant career background
- Donor history
 - Federal contributions over last 4-5 years
 - State/local contributions over last 4-5 years
- Notes from past interactions/ meetings
 - If your candidate spoke to them on the phone, at an event, or via text/email, these interactions should be reflected in the notes

How should my candidate ask for money on the phone?

How to ask for money

This section goes over the basic elements of “making the ask”. These points are applied to phone solicitation or “calltime”, “making the ask” at events and asking for money through digital fundraising.

A step-by-step guide to “making the ask”: Regardless of the candidate or fundraising method, certain universal principles apply when soliciting donors. It is essential to incorporate the following steps into a concise fundraising pitch lasting five minutes or less.

Step 1: Preparation and building a connection

Your candidate developing a rapport with the donor is crucial. Take the time to conduct preliminary research and gather relevant information.

Utilize the insights you’ve gathered about the donor to shape your approach and strategy. It is important to be well-informed about the following details:

Obtain information about the donor’s:

- Occupation and place of work
- Information about their spouse/ family
- Any boards or associations they are part of

- Correct pronunciation of their name
- Relationship with the candidate: Are they acquainted? How did they meet? Is it a close connection? Do they know anyone in common?
- Nature of the relationship: Is it personal or professional?
- Previous contributions: Have they donated before, and if so, how much?
- Commonalities: If your candidate does not have a prior relationship with the donor, identify shared attributes such as similar stances on issues, membership in civic or professional associations, shared experiences, or common adversaries.

Your candidate should rely on the background research you or your staff has obtained to have the context necessary in order to understand the motivation of the donor.

Processing donor information: preparing your candidate

Once you collect this background information, you or your finance staff need to put this information into either a call sheet (or dialer platform) or into a memo format if it is an in-person meeting. If it is for an in-person meeting, you should get the memo to your candidate a day or two in advance.

Step 2: Practice active listening

It is important that your candidate practices active listening when on the phone with a donor and during an in-person meeting. If your candidate spends too much time talking, they won't be able to learn about the donor and their questions and concerns. This is a good opportunity to talk to the donor about issues that are important to them and are going on in the community.

Step 3: Make the case

Your candidate needs to perfect this part of the elevator pitch. This is the part where they share:

- How the race is competitive
 - Information about the district
 - How much did the president win/ lose the district by?
 - How much did recent statewide candidates win/lose the district by?
 - Do you have polling or other data to share?
- Campaign accomplishments
 - Key endorsements
 - Fundraising numbers
 - How is your candidate's fundraising compared to their opponent?
- Why your candidate's background is the best fit for the district

Step 4: “Why is now the best time to give and what will this money be used for?”

When talking to donors, they are most motivated by deadlines or important campaign updates. Some examples:

- Friday is the last day of our financial quarter. This is my first quarter in the race, so showing a strong start is especially important
- My opponent is already attacking me on TV and digital advertising, and Republican outside groups have millions of dollars of airtime reserved because they know my opponent is vulnerable. It is important that I am able to fight back and communicate my campaign’s winning message.

These kinds of messages can help the donor feel bought into your candidate’s candidacy. This reinforces the concept of collaboration between the candidate and donor, illustrating a shared partnership. It provides a clear depiction of how the funds will be utilized throughout the campaign.

Step 5: Make the ask

This is the most important part of any call or meeting. If your candidate is not specific about what they are asking for, you will not get the most out of that donor interaction.

Elements of the ask:

- Needs to be a specific amount of money
- Needs to be specific about when you need it (today, end of quarter, etc)
 - You should use publicly available donor information to determine how much you ask for
 - **Example:** “Our quarterly deadline is coming up and I’m about \$10,000 short of our goal and are working hard to have our best showing yet. Can I count on you to invest in my campaign with a \$1,000 contribution today?”

Step 6: Silence

Once the ask is made, your candidate needs to let the person they are meeting or are on the phone with answer.

Step 7: Getting the money in

Once someone is converted from a “prospect” to a “pledge”, it is the responsibility of the staff to follow up. Follow-up should look like:

- **Right after the call:** email or text your ActBlue link to the donor
- **~2-4 days after pledge:** send another email or text
- **~4-7 days after the pledge:** staff should do “pledge chase” calls
- **~One week to ten days after the pledge:** candidate should call

Step 8: Thanking the donor

Once the contribution is made, a physical thank you note needs to promptly be sent to the donor. A common system used on campaigns is to have a thank you

Step 9: Re-solicit

Once someone is converted from a prospect to a donor, they should be updated on campaign milestones and events and should be asked for money again and again (existing donors are your best and most reliable donors!)

2. Finance Plan

What is a Finance Plan and why is it important?

A finance plan is a document that tracks all of the different streams of income for your campaign. Your finance plan should be a document that reflects the actual amount raised from the beginning of the campaign, but also should “project” how much your campaign is going to raise in the future.

What are projections and how do they affect your budget?

Projections are essentially the best estimate of how much money your campaign will raise. *Your projections should be based in reality and should not be wild guesses.*

Your finance projections are an essential part of making educated spending decisions. If your projections are not based in reality you will be at risk of either *overspending* (putting your campaign and candidate into debt) or *underspending* (leaving resources on the table).

How often should projections be adjusted?

Early on in the campaign, projections should be adjusted once a week. Once you begin to talk more seriously about paid media plans and production, you should update projections every 1-2 days.

What are the different streams of income that make up a finance plan?

- Calltime (direct calls candidate makes)
- Fundraising events
- PAC
- Labor
- Member (legislative and federal)
- Digital (SMS and email)
- Staff calltime
- Direct mail
- Bundlers (individuals who solicit contributions from their network on behalf of the candidate)

How do I start?

Break it down by part- focus on each projection individually

1. Calltime

- a. This will likely be the largest stream of income for your campaign. To calculate projections, you need the following information:
 - An estimate of calltime hours completed per week/ per month
 - An average raise per hour rate for your candidate's prospect calls
 - An average raise per hour for your candidate's rolodex calls/ re-solicit calls

2. Events

- a. As we went over in the previous session, it takes at least four weeks to plan an event. Your projection for an event should be based on:
 - Event host's commitment
 - What amount did they commit to raise?
 - What amount did they commit to personally raise?
 - Campaign outreach
 - From your staff and candidate calls and emails, how many people said they would attend?
- b. If the number of guests changes, you add a new host, or the event is on track to over-perform or under-perform expectations, projections need to be adjusted

3. Digital

- a. If you have a digital fundraising consultant, ask them to build out monthly projections. They may need to wait 4-6 weeks before they can give accurate projections
 - If you are doing D2D ads, SMS, or email, make sure those sub-categories are reflected
 - Check-in with digital consultant on a weekly basis regarding the digital program and performance

4. PAC/Labor/Member

- a. If you have a PAC consultant, ask them for a list of targets and for projections for the quarter.
- b. Check-in with the PAC consultant regularly regarding pledges, conversations with local labor groups, endorsements, etc.

Putting it all together

Once you collect the information you need about each income stream or “bucket”, it is time to put all of this information into an excel document/google sheet! The finance plan should be broken down by month and for the last three months of the campaign, the finance plan needs to be broken down by week.

This is a living document! It is allowed to be changed and should reflect the reality of your campaign!

Panel: Helping Your Candidate Raise Money

Speakers & Bios

- ---
- ---
- ---

Session Notes

- ---
- ---
- ---
- ---

What are my key takeaways from this session?

- ---
- ---
- ---
- ---

What am I still curious about?

- ---
- ---
- ---
- ---

Other notes:

Budgeting 101

Before We Start

What is a budget?

A campaign budget has been described as a flight plan for your campaign or a map to victory; but at the end of the day, your budget is:

- How much you are going to spend
- How you are going to spend your resources
- When you are going to spend it.

Key budget-related terms you should know:

Budget: The system for tracking money and setting the priorities for the campaign.

Line-item: specific expenditure

Projections: What you expect to spend money on.

Actuals: What you have actually spent money on.

Cash On Hand (COH): Your actual raise minus your actual spending. Please note: This does not include checks or any pending money, but it does include checks you have sent that have not yet been deposited. Bank statement \neq COH

Zeroing out: The act of making past projections equal actuals.

Reconciliation: The purposeful rebalancing of past actuals to projections.

Spend down: The last few weeks of the campaign, where you are spending large amounts. Often, during the spend-down phase of the campaign, you will be wiring out as fast as you raise.

Budget gap/surplus: Your projected raise minus projected spend. If you have money left over, this is called a surplus. If you are projected to spend more than you are projected to raise, this is called a budget gap.

First week (day) in the red: The first week or day you are projected to dip below zero COH.

ZOOM OUT

You are now going to be broken out into pairs.

In previous roles you've held, what have your interactions been with the campaign budget? What questions do you have around budgeting? Take a few minutes to reflect and then share with your partner.

Building the budget

Your campaign budget should be a living document that adjusts and changes depending on the following factors: outside spending, investment from caucuses/ committees, fundraising prowess, general political climate, and perceived competitiveness of the race.

Below, we have broken down the three phases of building a campaign budget.

Phase 1: Gathering:

Sometimes starting can be the most difficult part. It can be daunting to have an empty spreadsheet or nothing in Warchest.

A good place to start is to reflect on your known recurring expenses, like:

- Payroll for current staff
- Wire/ bank fees
- Rent/utilities for the office

Early on in the campaign, you should also reach out to all of your paid media consultants and ask them for:

- TV plans (high and low with wire dates)
 - Also ask for projected production costs and when they need money up-front/ what expenses can wait. Sometimes TV consultants will let you pay-as-you-go or split this payment to free- up cashflow. The main production costs are:
 - TV shoot costs (crew, consultant travel, any permit fees, hair/makeup, etc)
 - Post production costs
- Mail plans (high and low, with wire dates)
 - Also ask for projected shoot costs
 - Photographer fee
 - Consultant travel to shoot
- Digital plans (high and low, with wire dates)
- Research plan
 - Projected costs of self and oppo research books/ approximately when you will be invoiced
- Polling plans (if relevant, sometimes caucus manages polling process)

The reason we ask for **wire dates**, which refers to the date you should initiate a wire to your paid media consultant for the week. It is important to ask for these because TV, digital, and mail consultants all work on different timelines.

Example

For example, your TV consultant will likely ask you to wire on a weekly basis starting the week **before** you go up on TV. This is because TV station staff (which places media buys) do not process buys over the weekend. Nearly all television consultants work on a **Tuesday-to- Monday schedule**, which means that in order for your TV to be up on Tuesday, you have to initiate a wire on Wednesday of the week before so your consultant/ their media buyer can secure the desired inventory.

Thinking ahead will help you make sure you have the money you need to make your wire dates.

Aligning with your candidate

Another important part of the gathering phase is aligning with your candidate. Starting budget conversations early on can help mitigate future disagreements and is a good way to build trust with your candidate.

Here are some key questions to discuss:

- How long do you want to keep staff on payroll (November 15? November 30? End of the year?)
- Signoff on staffing plan- what staff do you need and when do you need to bring them on? Propose an approximate market rate salary for placeholders in the budget.
- How are you planning to handle health insurance for staff?
- Anything they strongly would like to incorporate in the campaign budget?

Phase 2: Building

Once you gathered your plans from your consultants, confirmed wire dates with your consultants, spoken with your candidate about the staffing plan, you are ready to build your budget!

- Here are some things you should have in your budget:
- Mail plans (don't forget to add still shoot)
- TV plans (don't forget to add shoot, buy, post-production)
- Bank fees and wire fees (your bank should be able to tell you these)
- Digital plans
- Payroll fees/ payroll taxes/ unemployment insurance
- ActBlue fees
- Salaries
- Placeholder office costs (rent, internet, electric)
- Placeholder office supplies
- Placeholder travel and fundraiser costs
- Research (ask caucus if they recommend you do a book)
- Polling (ask caucus)
- NGP
- VAN
- Projected candidate travel
- Misc (yard signs, merch, etc)

Phase 3: Maintaining

Once you have your projected expenses in your budget, now you have to regularly update it!

There are four key things you should be updating at least on a weekly basis:

- Expenses (or Budget line items).
 - Reconciling your budget, or “zeroing out” is an essential part of budgeting and evaluating the accuracy of the projected spending you had in your budget
- Disbursements (money out)
- Updating income (money in)
- Updating projections (money you think you will have in the future)

How often do I need to update my budget?

| Daily | Weekly | Monthly | Quarterly |
|--|---|--|--|
| <ul style="list-style-type: none"> When spending starts, all disbursements should be updated in real-time | <ul style="list-style-type: none"> Compliance firm P&L (inc COH) Finance Director updates projections Finance Director inputs income Manager updates disbursements Manager reconciles budget | <ul style="list-style-type: none"> Match budget to bank | <ul style="list-style-type: none"> Manager works with consultants on updated plans based on projected raise Sync with compliance-make sure budget matches report |

Moving from monthly to weekly to daily

As your campaign increases the frequency in which it wires out money, so should the frequency in which you update your disbursements and projections.

| ~12 to ~4 months before election | ~4 to 3 months before election | 3 months before election to e-day |
|---|--|--|
| <p>Disbursements and projections: should be updated approx. once every seven to ten days</p> <p>Reconciled: Budget should be reconciled/ zeroed out approximately once a week</p> <p>Critically looking at line-items and paid media plans: Since the election is pretty far out, you should do a deep dive into your budget about once a quarter at this point.</p> | <p>Disbursements and projections: should be updated approx. twice a week</p> <p>Reconciled: Budget should be reconciled/ zeroed out approximately twice a week</p> <p>Critically looking at line-items and paid media plans: Since the election is pretty far out, you should do a deep dive into your budget about once a quarter at this point.</p> | <p>Disbursements and projections: Should be updated every time you send a wire over \$1000 (close to election this may be every day). Projections should be updated twice a week/ as things change</p> <p>Reconciled: Budget should be reconciled/ zeroed out whenever you send over a wire over \$1000+</p> <p>Critically looking at line- items and paid media plans: At this point, you should have a better sense of:</p> |

| | | |
|--|--|---|
| <p>If you aren't in a primary, you don't really need to ask for updated media plans at this point.</p> <p>A natural spot in the campaign to re-look at media plans and how your campaign is going is surrounding your TV shoot (how many spots you are going to go up with, how long of a shoot you are going to need, how much it is going to cost)</p> | <p>If you aren't in a primary, you don't really need to ask for updated media plans at this point.</p> | <ol style="list-style-type: none"> 1. What your partner and allied groups are going to spend 2. What your opponent/ Republican outside groups are going to spend. <p>You should examine your paid media plans approximately once a week. The goal always to at least communicate the same amount as your opponent, but it is even better if you are able to outspend your opponent (your media consultant should have access to competitive reports),</p> |
|--|--|---|

How does the rest of my team interact with the budget?

| Role | Responsibility |
|---------------------------------|--|
| Campaign Manager | Owns and manages the budget |
| Finance Director | Manages the income and fundraising projections |
| Candidate | Consulted regarding major strategic spending decisions; candidate should be briefed on a regular basis regarding fundraising expectations and its impact on the budget as a whole |
| Department Directors | Communicates staffing plan and budget needs to campaign manager |
| (If Applicable) Compliance team | Sends P&L to CM weekly; should be a point of contact for the bank/can assist with wiring |
| Paid media consultants | Paid media consultants send TV, mail and digital plans with wire dates to campaign managers. Tentative Paid media plans should be discussed before and regularly updated, especially after large expenditures, polling etc |

| | |
|----------------------------|---|
| Junior staff | Virtually have no interaction with budget. Any expense requests should be directed toward their supervisor. |
| Caucus Director/ Sr. Staff | Are a key stakeholder who will be very in the weeds on your campaign's spending. Communicating any big budget changes to the caucus is extremely important. |

What should I expect to spend most of my money on?

Most competitive campaigns spend the bulk of their resources on paid communications (TV, mail, digital).

As a general rule, competitive campaigns should plan on spending to zero (spending all of their money).

75% direct voter contact

- Paid communications
- Organizing materials

10% overhead

- Staff salary
- Rent / Ops
- Fundraising events

10% research

- Polling
- Self / Opposition Research books

5% political/ miscellaneous

Spending to Zero

The last 8-12 weeks of the campaign should be when your campaigns spend the bulk of its money, mostly on paid media. This phase of the campaign is commonly referred to as the "spend down".

Key elements of the "spend down"

- **Understanding cash on hand**
 - Cash on hand is not usually the amount of money left in your bank account. If you have sent a wire out and it hasn't left your bank account yet, that should be subtracted from your count.
 - Cash on hand should include checks that are in the process of being deposited

- It is important to understand your cash on hand because if you are just relying on your bank statement, it will always be a little off
- **Communication norms with your finance director**
 - If you don't know how much money you are projected to have at a given moment, you are not going to be able to spend your resources wisely.
 - A few weeks before your paid comms plan starts, you should have a weekly cash flow meeting with your finance director where you go over:
 - Projections (any changes/ adjustments need to be made?)
 - Upcoming spending
 - Any changes to the budget (or changes you would like to make should projections change)
- **Understanding “going into the red”**
 - When you begin writing out large sums of money, your cash on hand begins to dwindle. Eventually, your campaign is going to project spending more than it brings in, which can be daunting!
 - **Splitting wires**
 - If you are anticipating running out of money, you should talk to your consultants about your options in order to stay on TV
 - **One option can be splitting up your TV, or digital wire** – this means sending out money for half of the week on your usual wire date and the other half later for the other half of the TV buy.
 - If you are confident about the ability to make the wire (you have pending ActBlue wires, or a big event that week which is projected to bring in a lot of money, etc) this is a good option for you in order to have some budget flexibility.
- **Understanding banking systems**
 - You need to know the following things about your bank in advance of spending down:
 - Hours of operation/holidays observed
 - The latest you can get a wire out and have it hit the same day (often it is earlier than the closing time!)
 - Your bank account wiring limits
 - Sometimes banks have a default wire limit– if you are going to be wiring large amounts of money, you need to know what the wire limits are and should ask to raise them if the limits are too low.
- **Make sure you have ActBlue payments wired (not sent via check)**
 - It will make your life easier and it will help you avoid the several day waiting process

Excel Budgeting

Now that we've gone over what a budget is, who is involved in the budgeting process, along with other budgeting basics and best practices, we are now going to dive a little deeper into the processes and mediums campaign managers use.

The traditional way of budgeting is using an Excel spreadsheet (see sample spreadsheet in the drive)

Common mistakes:

- **Human error: formula issues**
 - A common mistake in Excel budgeting is adding rows/columns to your spreadsheet and not double checking your formula
- **Giving editing access to too many people**
 - You should be the only person updating your budget, and your finance director should be the only one updating projections
- **Not aligning your finance plan + budget**
 - A downside to excel budgeting is that you usually have to look at two different documents when it comes to spending, the budget and the finance plan. If you are at the point in the campaign where your budget is broken down by day, your finance plan should match that granularity

Independent Budgeting Exercise

What is Warchest?

Depending on the caucus you will be working with, you may be asked to put your budget in a campaign-specific budgeting software called Warchest.

What makes it different from a regular spreadsheet budget?

In Warchest, you update both your campaign's income and your campaign's expenditures. If you update your budget regularly, Warchest calculates some important numbers for you, including:

- First day in the red
- Budget gap
- Cash on hand

This can help eliminate some of the human error that comes with traditional budgeting.

One aspect that makes Warchest different from a budget spreadsheet is the **granularity**.

Warchest requires thinking about your budget in terms of days (in an Excel sheet, the granularity can be manually adjusted).

Building a Warchest budget

The building of a Warchest budget is a similar process to building an Excel budget. You still need to gather the plans from your consultants, align with your candidate on spending, get a staffing plan approved, and align with your finance director on projections.

Maintaining Warchest

Once you have your projected expenses in your budget, you now have to regularly update it!

There are four key things you should be updating on a weekly basis (before major campaign spending)

- Expenses (or Budget line items)
- Disbursements
- Uploading contributions
- Updating projections

Step 1: add contributions

Step 2: add disbursements

Step 3: reconcile projections (past)

Step 4: adjust projections (future)

Step 5: reconcile budget (past)

Step 6: adjust budget (future)

****It is critical that these are regularly updated in order for you to understand what your budget gap is so you can make cuts accordingly****

Budget Gaps & Projections

Reminder: Key Terms

Budget gap/surplus: The COH you expect to have at the end of the campaign. Typically projected raise minus projected spend.

Projections: the amount of money you are on track to raise throughout the campaign. Some factors that can impact your projections are: candidate's personal network, competitiveness of the district, contribution limits in your state, expected assistance from partners and allies.

Cash flow: the movement of money in and out of your campaign bank account at the end of the campaign.

Closing the gap

Budget gaps are a normal function of a budget, especially early on in the campaign. Your paid media plans should ideally be a slight reach above what you are projecting.

Ideally, the closer you are to the election, the more your budget gap shrinks. As you begin your spending program, it is important to communicate with your candidate on the status of your campaign's budget gap. Remember, if your campaign goes into debt, it becomes your candidate's debt!

How do you fill the gap?

You can close a budget gap by:

- Raising more money
- The caucus taking certain expenses off of your books (field staff, part of mail plan, poll splits)
- Outside groups/party directly investing in your campaign

What to do if you are raising more than your projections

If your fundraising is doing better than expected, that is wonderful! But, if you are running a race in a competitive district, you do not want to end the campaign with \$100,000 in the bank.

The moment you raise your projections or begin raising more than expected, you should talk to your consultants about what your options are.

For some mediums, like TV or digital, it is fairly easy to plus-up spending. For other mediums like mail, it requires a longer runway, making it more difficult to add additional mail pieces given that it requires more in-advance planning.

Cutting your budget

If your budget gap is NOT shrinking, you need to cut your budget. Maybe that means starting a week later on digital, cutting a mail piece, or cutting programmatic or part of your cable buy.

This is not your consultants' first rodeo— it is better to have an honest conversation right when you start having budget problems or right when you start missing your projections than going dark on TV or not being able to pay your consultants' invoices.

Having honest conversations early gives your consultants an opportunity to adjust plans, find places to move money around, etc. It may be easier to be flexible digital moreso than TV, and TV moreso than mail, because mail moves very slowly with the printing process.

Does spending to zero really mean having \$0 in the campaign account on election day?

Honestly, no. It almost never means that. You need to take into account expenses that have to be paid after the election. Some examples are:

- Payroll (either through 11/15, 12/1, or whatever you and your candidate decides is your staff's last day on the campaign)
- Rent (you probably will have to pay rent through the month of November at least)
- Any costs associated with breaking-down the office

In Summary:

- Communicate with your candidate, your consultants, and the caucus you are working with about your budget gap and upcoming spending
- Monitor your finance director's projections + meet with your finance director on a regular basis to discuss any changes to their projections/ finance plan
- Cut if you need to! Plus-up if you need to! Don't leave money on the table, but also don't get your candidate into debt!

Putting it all together: Budgeting and Cash flow in practice

Overview

This section will cover one of the most important roles of a campaign manager, spending down your budget and coordinating with your Finance Director on “cashflow”, which is the movement of funds in and out of your campaign account.

Please see the relevant key terms for this section below:

Cashflow: the movement of money in and out of your campaign bank account at the end of the campaign.

Finance plan: the guiding document that tracks money raised and projected money raised for the cycle, broken down into “buckets”.

In the red: to be in debt, running a deficit, or generally just not making money—being cash negative. The first day your campaign is projected to run out of money.

Budget gap: The difference between the amount of money you are projected to raise and the amount of money you need to win according to your budget.

Reconcile: In budgeting, matching the amount projected to spend with the actual spent until all money in the campaign bank account is spent.

Spend-down: The last few weeks of the campaign, where you are spending large amounts. Often, during the spend-down phase of the campaign, you will be wiring out as fast as you raise.

Division of labor: roles of Finance Director and Campaign Manager during “spend down”

During the last few months of the campaign, one of the most important roles of a campaign manager is to manage your campaign’s budget “spend down”. This involves having a firm grasp on the following:

- How much money your campaign currently has
- How much money your campaign will have in the coming months (or weeks)
- How much money your campaign has spent (and on what)
- How much money your campaign is planning to spend
- The size of your budget gap or surplus (the difference between the amount of money you are going to spend and the amount of money projected to raise)

Because understanding the movement of money is an essential part of spending down, working closely with your finance director is essential– please see division of responsibilities below:

- Finance Director
 - Provide daily COH reports
 - Update finance plan nightly
 - Update projections weekly (at least, becomes more frequent within the final 4-6 weeks)
 - Input finance plan changes/ contributions into Warchest (or whatever budgeting system your caucus or committee is using)
- Manager
 - Makes decisions about what the campaign is spending money on
 - Makes budget recommendations regarding potentially budget cuts or “plus-ups” depending on projections / how the race is going (in tandem with candidate and consultants)
 - Updates manager side of Warchest (disbursements, spending changes, zeroing-out budget)

Sample agenda for cashflow meeting with Finance Director

In order to ensure no balls are being dropped, having a cashflow conversation on a weekly basis (and more frequently as spending intensifies) with your finance director where you reflect on the week past and look forward to the upcoming week will set your campaign up for success.

Agenda

- Manager:
 - Upcoming spending review, including wire dates
 - Budget gap review (did it grow, or did it shrink from where you were last week?)
 - Projected first day in the red (the first day your campaign runs out of money)
 - Review of high/low budgets
- Finance Director
 - COH
 - Projection overview
 - Bucket-by-bucket- how did fundraising go last week? Did we hit our projections? If not, why? If yes, should we raise this week’s projections?
 - Areas of potential growth in finance plan

Campaign Plans: An Introduction

A campaign plan is a 10,000- foot view of your campaign operation including:

- **A set of assumptions about the race:** based on Democratic candidates' performance in the district, demographic and ideological trends and any other factors that may affect the race (ie-is it a presidential election year, is there a statewide election on the ballot, is there an incumbent in office)
- **Strategy, Tools (Resources) and Tactics:** What kinds of programs do you need to tin to win? Persuasion, Paid media, Organizing, Direct Mail?
- **Narrative version of the budget:** How much money do you need to win and how will you raise it?
- **Accountability tool:** Keeps the campaign on track, builds trust with your candidate, the caucus, and other key stakeholders; helps measure the campaign's success

A campaign plan is NOT

- **Set in stone:** You will change your plan based on the progression/ performance of your campaign. Campaign plans are living documents.
- **Limitations on what will be done on the campaign:** With even the best plans, you may need to incorporate new programs or tactics.
- **A plug-and-play tool where one template works for every scenario:** Think critically about the execution of your plan and address each scenario accordingly. When necessary- seek the counsel of consultants, coaches, and fellow managers.

Writing a campaign plan

There are a number of ways to write a campaign plan:

- By department: Communications, Field, Finance, etc.
- Over time: Q1, Q2, Q3-Labor Day, Labor Day-GOTV, GOTV-Election Day

You can use a word document, a spreadsheet or some combination of both.

Elements of the campaign plan

PTV (Path to Victory):

- How many votes do you need to win?
- What key groups of voters do you need support from to win? How will you win that support?
- ****This summary should dictate all of the other pieces of your plan****

Budget: Spending overview/major start dates for polling, mail, TV

Staffing plan:

- Who are you hiring and when?
- How much are you paying them?

Communication plan:

- Message box: How is your campaign defining your candidate, your opponent, addressing potential attacks.
- Press strategy: how will you engage the press? What is your earned media strategy?
- Digital strategy: how will you leverage digital tools? What's your digital strategy?

Political plan:

- Key stakeholders/constituencies: who are the key constituencies your campaign needs to reach and how?
- Endorsements to chase: What key groups and VIPs do you need endorsements from?
- Outreach planning: How will you engage and build relationships with key community stakeholders?

Organizing plan:

- Measure capacity: Based on your campaign's targeted universe; what kind of volunteer capacity will you need to recruit and deploy. How will they be managed and directed by your staff?
- Timeline for actions: How and when does your field plan ramp up and scale?
- Goals: What are your voter contact goals?

Finance Plan: Lay out any fundraising numbers and key fundraising strategies.

Research:

- Opposition/Self research if applicable.
- Polling/any other research timeline.

Paid Media: What are your TV and paid digital plans? (Consultants should help with this).

Mail Plan: What is your direct mail plan (mail that you will send to voters throughout the campaign to persuade and mobilize them, your mail consultants will provide this).

GOTV Plan: Any pieces of your organizing specifically related to GOTV, universe size curation, setting aside budget for GOTV related political events, press avail, plans for the candidate, etc.

A Few Reminders on campaign planning

- This will take time... give yourself a few days to write the plan, sit on it, and come back to it to check your assumptions
- Are you assuming an influx of cash? Why? Does that need to change?
- Remember to work with:
- Staff, consultant, and stakeholders
- Friends/mentors
- You should also be willing to change your campaign plan if necessary
- You should think about what you can present to your candidate vs what you need to get buy- in on before considering your plan “final” (for now)

Campaign Plans: Best Practices

Speakers & Bios

- ---
- ---
- ---

Session Notes

- ---
- ---
- ---
- ---

What are my key takeaways from this session?

- ---
- ---
- ---

What am I still curious about?

- ---
- ---
- ---
- ---

Other notes:

Intro to Communications

A campaign's communication plan serves as a roadmap for delivering a targeted and strategic message to voters, donors, and other key audiences. In smaller races like state legislative races, campaign managers may serve in the role of a communications director.

What's the message?

The development of a strong campaign message starts with defining your candidate, your opponent, and contrasts between the two. The caucus and your consultants may share available data and polling to help you craft your message.

A messaging square (frame) can be a helpful way to organize the message you are conveying to your target audiences. Below is an example:

| | |
|---|---|
| <p>What We Say About Us</p> <ul style="list-style-type: none">• Teacher• Working mom• Understands region• Stands up for you• Independent• Consensus builder | <p>What We Say About Them</p> <ul style="list-style-type: none">• Sides with special interests• Voted to end Medicare guaranteed benefits• Anti-choice• Out of touch• Supports tax breaks for corporations and the wealthy |
| <p>What They Say About Us</p> <ul style="list-style-type: none">• Liberal• Not a real democrat• Supports liberal policies• Tax and spend liberal | <p>What They Say About Them</p> <ul style="list-style-type: none">• Tough on crime• Strong supporter of armed forces• Conservative• Tough on illegal immigration |

Communications plans are typically divided into three parts:

- **Earned media:** - Media coverage your campaign “earns” through coverage or promotion of the campaign through organic means. Examples include: TV interviews, magazine features, news coverage of a campaign event, newspaper articles
- **Paid media:** Communication your campaign spends to reach voters. This includes: TV, Mail, Digital, and Radio.
- **Social media:** Organic (not paid) engagement by posting content on social media platforms (Facebook, Threads, X, Instagram)

Earned Media: Planning Your Strategy

- Identify the key audiences you need to persuade, including constituencies, voters in particular neighborhoods, wards or other geographic areas. Key audiences can also include donors, the political chattering class, political leaders (district leaders, party officials).
- Work with your consultants to develop a winning “messaging frame”.
- Determine the most appropriate earned media mediums for your campaign. Do your audiences read specific local newspapers or blogs, watch specific news stations or cable news?
- While preparing your candidate’s schedule for public events/activities, develop metrics for highlighting key issues and/or messages during a given timeframe. For example, “two events per month with gun safety groups/audiences highlighting candidate’s support for reforming gun laws.”

Tactics for Receiving Earned Media Coverage:

- Targeted Zoom events
- Print interviews
- Tailored in-person events
- TV interviews
- Social media – The quickest way to get out a message.
- Press Release – Getting out a message, directly to press, tied to a larger headline.
- Press Advisory – Getting out a message by inviting press to a real-world event.
- Coffees and sit-down with reporters, columnists and news outlet editorial board members. While these might not turn around immediate coverage, these engagements will likely be critical for shaping coverage of your candidate and the campaign at large.
- “Ride alongs” – Useful for setting up 1-on-1 interviews and helping reporters gather “color” on your candidate for their stories.

Below is a sample earned media plan

TO: Candidate & Team

FROM: Campaign Manager; Communications Director

RE: EARNED MEDIA PLAN

DATE: XX-XX-XXXX

Messaging Frame: The below message frame will provide a streamlined, unified, message for the campaign across departments and communication mediums.

First and foremost, any earned and paid communication effort must protect and amplify Christy's well-established personal brand. Local perspective is key.

In one sentence: A longtime (BLANK) resident, Candidate 1 is a homegrown independent leader who will work with both parties to deliver common sense results for the residents of the (DISTRICT), from making healthcare more affordable and accessible to ending Washington's corrupt politics.

Longer version: Candidate 1 is a homegrown and effective leader who has lived in (DISTRICT), for nearly 40 years, raised their family here, and is now stepping up to represent her home in Congress.

As (TITLE), Candidate 1 reached across the aisle and co-authored a bill that gives tax relief and support to small businesses owned by veterans. She helped pass a historic bipartisan law to expand paid family leave for new parents and caregivers and secured resources for healthcare clinics, schools, emergency responders and seniors throughout the district. She has also prioritized keeping families safe in her role as Chair of the state's Emergency Management Committee.

Candidate 1 knows that we need to end Washington's corrupt politics in order to deliver results for families and our community.

In Congress, Candidate 1 will be an independent voice who will work with anyone to deliver for our community. She will work across party lines to ensure access to affordable health care, guarantee that our veterans get the benefits they have earned, enact equal pay for women and men, provide safer schools for our children, and create more local, middle class jobs.

Monthly Communications Goals & Metrics:

- 2- 4 press events per month
 - Big Endorsements
 - Town hall
 - Events surrounding the timing of presidential events?
- 2 op-eds per month in widely-read local news outlets
- National cable interviews whenever topic is strategically smart & beneficial
 - It's important to consider whether difficult topics, like immigration, are in the news and weigh the possibility of a harmful soundbite against positive attention or fundraising
 - Consider Candidate brand
- National print interviews should be high priority whenever beneficial topics and
- Candidate's schedule allows
 - This will help drive attention and money to the race, and are less risky than cable
 - Editorial Board meetings - Important once endorsement process & timing is determined
 - Weekly surrogate talking points

Press Outreach

Concerted press outreach will help garner free earned media coverage throughout the campaign. Some events can be more open, town hall-style events, while others would be more thematic such as a meeting about protecting Social Security, African American and Latinx roundtables. Candidate 1 could meet with seniors at a seniors' center to specifically speak about her commitment to protecting Social Security benefits, or an event outside a planned parenthood clinic emphasizing the importance of reproductive healthcare.

The campaign should have a comprehensive press list of the district, state, and relevant national political press corps including print, radio, and television reporters who are invited to all of our public events. Additionally, cameras from local television stations and reporters from smaller town newspapers should be contacted directly whenever there is a public event in their area.

Reporters could also ride with Christy as she drives to some events, to give them a real first-hand look at the campaign.

We find ourselves with the added challenge of Candidate being in the capitol, Monday to Mid Thursday every week meaning we must maximize her time in-district. We should make a concerted effort to book Candidate 1 on Sunday morning broadcast shows as well as radio broadcasts such as KPCC/KCRW/KNX/KF. Those wide-reaching earned media hits will help underpin our paid media efforts.

Organizing Program

This plan also lends itself to a field component. Volunteers will phone voters letting them know that candidate 1 is the consensus Democratic nominee and will need to vote for her TWICE on the same ballot on the March 3rd primary. They will also provide background on candidate 1's bio and policy stances.

As part of this field effort, volunteers will collect email addresses, cell phone numbers, and other information allowing for regular contact between now and Election Day.

Integrating Website, Email, and Social Media

Digital should be integrated into every aspect of the campaign to reflect the grassroots energy around Christy's campaign.

Whenever possible, social media should be leveraged to feature the real-people stories Candidate 1 has heard along the way, e.g. ideas by small business, troubling stories from local workers, etc, and amplify key campaign messages. The goal is to communicate an integrated, unified message across all of our platforms.

- Volunteers online, along with mass emails from the campaign to individuals within the district, can help build crowds for campaign events.
- The campaign can Facebook Live select public appearances such as office openings.
- Photos from the events can be posted by candidate 1's supporters with targeted Hashtags
- Fundraising emails can highlight candidate 1's activities within the district
- Candidate 1 can even post comments after events on Facebook, Twitter, and other social mediums, noting the interesting problems and solutions she has learned at each stop.
- The Organizing Director should have organizers take photos while canvassing or at events and forward them to the Communications Director for use on social.
- We should also have field staff help empower select volunteers to push a unified message as directed by the campaign, either to amplify an existing message or provide rapid response through a grassroots channel.

Paid Media

We will discuss paid media later in this training

Comms 101: Communicating with the Press

Effective communication with the press is essential to ensure that your campaign's message is reaching key voters through your chosen mediums.

Key Terms:

- **Off the record:** Information that is shared with a reporter that is NOT attributable to the source due to privacy or confidentiality. While off-the-record material will not be included in the story, it can often be valuable context for reporters, so sources wishing to ensure the confidentiality of certain information are generally advised to discuss the “terms of use” before disclosing the information, if possible.
- **On the record:** Information that is shared with a reporter that is attributable to the source. On the record is generally used for formal interviews and when providing quotes.
- **On background:** Information that is shared with a reporter that can be published (with direct quotes or paraphrased), but only under conditions agreed upon with the source. Typically that source requests to remain anonymous. You'll see this most often in stories that use attribution such as “a Democratic strategist says” or “according to a senior campaign official”. On Background is generally a useful way to chat with reporters without fear of being directly quoted. Interviewees will often share information on background to provide additional context/framing for the story

Preparation

As you arrive in your district and begin crafting your communications plan, you should prioritize the following tasks

- Create a Press list of local outlets and publications
- Reach out to reporters, columnists, and editorial board members for 1:1 meetings to build relationships
- Create a Media Kit for reporters, such as a candidate biography and headshot, one-pager on your candidate's position,
- Create template press releases and media advisories

EXAMPLE

U.S. Senator Tammy Baldwin Announces “Business Leaders for Tammy” at Events in Marinette and Milwaukee

Over 100 local business leaders back Tammy Baldwin’s bipartisan
leadership to build a made in Wisconsin economy

REALTORS from across Wisconsin join announcement by endorsing Tammy
Baldwin

MARINETTE — U.S. Senator Tammy Baldwin today announced Business Leaders for Tammy, a coalition of over 100 Wisconsin business leaders from across the state, at events in Marinette and Milwaukee.

In Marinette, Tammy Baldwin was joined at the Wisconsin Maritime Center of Excellence by representatives from Fincantieri Marinette Marine, Strom Worldwide, an LCS supplier, and a local small business owner, to highlight Tammy’s advocacy for the U.S. Navy Littoral Combat Ship. In Milwaukee, Tammy Baldwin was joined at Fred’s Pub at the Miller Brewery by representatives from MillerCoors, Fairbanks Morse, and a small business owner from Racine.

“Today, I am proud to announce the support of over 100 business leaders from across Wisconsin. Together, we are standing up and demanding that Washington starts working for Wisconsin’s businesses,” **said Tammy Baldwin.** “Whether it’s taking on unfair trade deals, passing Buy American laws or reforming our tax code, we can continue to drive growth, support job-creating businesses and create a made-in-Wisconsin economy built to last.”

“Our hot production line would go cold without the strong, unyielding support of Senator Tammy Baldwin, who fights every single day for our shipyard and our working families. She leads the fight in the Senate for the Freedom Class Littoral Combat Ship,” **said Jan Allman, President, Chief Executive Officer and General Manager, Fincantieri Marinette Marine.** “The future of Fincantieri Marinette Marine is the FREMM Frigate. And we cannot win the competition unless Senator Tammy Baldwin leads the fight. We cannot lose her. We have to keep her.”

“Senator Baldwin’s leadership has created an environment where businesses like MillerCoors can invest in Wisconsin and create jobs,” **said Kelly Grebe, Chief Legal and Corporate Services Officer, MillerCoors.** “Next month, the Beer Institute will be honoring Senator Baldwin with the 2018 Beer Champion Service Award. Senator Baldwin will be receiving this award due to her passion, devotion and leadership for our company, our employees, our consumers and the beer industry in Wisconsin.”

Additionally, REALTORS from across Wisconsin joined in launching Business Leaders for Tammy today by announcing their endorsement of Tammy Baldwin:

“We are proud to endorse Senator Tammy Baldwin for her long record of supporting homeownership and private property rights and we look forward to her continued leadership on key real estate issues in the U.S. Senate,” **said Jim Schuessler, Wisconsin & National Realtors PAC, REALTOR® with Stark Company Realtors from Madison, Wisconsin.**

In the Senate, Tammy Baldwin has worked across party lines to create a made in Wisconsin economy built to last.

Tammy Baldwin has been an unrivaled leader for Buy American laws, introducing legislation supported by Democrats and Republicans, including President Trump, to boost Wisconsin manufacturing. Tammy Baldwin has also led efforts to combat China’s cheating and confront unfair trade deals.

Working with Wisconsin manufacturers, start-ups and breweries, Tammy Baldwin has introduced tax reforms that would help spur investment in innovation, drive economic growth and create new Wisconsin jobs. For more information on Tammy Baldwin’s leadership to support Wisconsin business leaders, **see here [INSERT HYPERLINK].**

Candidate Press Prep

Practice makes perfect. Taking time to prep your candidate to talk to the press can make all the difference.

Before stepping in front of the mic or camera, you should work with your candidate to craft/refine their elevator pitch and presentation.

Who is involved

- Media consultant
- Research consultant
- Mail consultant
- Pollster

Elevator pitch

- Who am I?
- Why am I running?
- Why me? (Contrast)
- What do you want your audience to do? (Call to Action)

Prepping for the interview

- Know the format
- Do your homework
- Know your audience
- Prepare answers to “hot topic” questions that could touch on controversial topics
- Practice with your candidate (Recording a mock interview, watching and debriefing can be helpful)

During the Interview:

- Record the interview (Voices Notes on iPhone is a good tool to use)
- Be clear
- Pivot (when necessary)
- Stick the Landing (Make sure to repeat anything you want to make sure that voters know)
- Stick to the agreed timetable and don't be afraid to enforce the conditions of the interview

After the interview

Follow up with reporter on how and when the story will run, clarify/clean up any answers that your candidate answered poorly, and provide further information for any outstanding questions

Candidate Digital & Social Media

Social media can be a great tool to help raise your candidate's name ID, share their personal story, share news and updates from the campaign trail and weigh in on important salient issues. While you shouldn't place too much focus on your candidate's social media presence- it can be a great supplement to your overall strategy. You may have the help of a digital consultant to help ensure social media is a helpful tool.

** Important note: Your candidate's personal social media page and campaign page should be separate ***

Candidate Profile: What is your brand?

Know your candidate

- Danica Roem
- First transgender state senator in VA (Senator or Delegate)
- 'Fix the Damn roads'

Social Media Platforms: Which platform to use/why?

- Facebook
- Instagram
- Twitter
- TikTok

STAY ON MESSAGE

- Personal
- Work
- Cultural
- District

Social Media Examples

Personal:

- Accomplishments
- Family
- Personal Life


Del. Danica Roem @pwcdanica

It's April 26: my debut book "Burn the Page" is now out in stores and online! 📖

It's funny, it's self-deprecating and it's for the underdogs: own your own narrative and ignite change.

- ✓ Hard copy
- ✓ Audiobook
- ✓ E-book

Order #BurnThePage here:



penguinrandomhouse.com
Burn the Page by Danica Roem: 9780593296554 | PenguinR
An inspirational memoir-meets-manifesto by Danica Roem, the nation's first openly trans person elected to US state ...

6:55 AM · Apr 26, 2022

Position Posts

- Committee Assignments
- Policy Priorities
- Work Related

Del. Danica Roem @pwcdanica · Nov 1

12 HBs passed to feed kids
\$24.5M to #fixRoute28

"In her speech to volunteers, Roem focuses almost entirely on her campaign slogan, which is 'Fixing Roads, Feeding Kids,' a nod to her work on alleviating traffic congestion & ending childhood hunger in VA."



5 41 89 5.4K

Del. Danica Roem reposted

Del. Danica Roem @pwcdanica · Oct 26

"The issues I'm running on in this campaign, what I hope to do in the state senate, are exactly what I've been prioritizing the last six years in the Virginia House of Delegates: fixing roads, feeding kids," Roem said."



Del. Danica Roem @pwcdanica · Sep 23

In 2022, we passed my bill HB 925 to require large private employers providing health insurance to include coverage for high-tech prosthetic devices for people in the limb loss community.

It's great to see the ACA will also be providing that coverage.



richmond.com

Del. Danica Roem @pwcdanica · Oct 10

Here's a thread about what's happening right now with Route 28 in Manassas Park, Yorkshire and Centreville, what it took to get here, and what's happening next. 📖

Del. Danica Roem @pwcdanica · Oct 10

With the six-landing now complete on Route 28 in Centreville, construction crews will be working on the shared-use paths on both sides of the road so they're ready by early next year, which will expand multimodal connectivity in the area. Then it's time to start my STARS project.

Campaign Posts

- Filing Process
- Endorsements
- Campaign Events
- Information about Voting



Del. Danica Roem @pwcdanica

Huge shout-out to area's field director @JosephTennant, Team Thomas and Team Nembhard's FDs, and all of the organizers from all three campaigns — plus our other staffers & volunteers who pitched in to help — to make sure every weekend goes well in the field. Our field team is A+.



Del. Danica Roem @pwcdanica · Sep 22

Early voting begins today, #Virginia!

Where to vote in SD-30:

Prince William County (8:30AM-4:30PM):
 PWC Office of Elections (Manassas)
 Haymarket Gainesville Community Library

City of Manassas Park (8:30AM-4:30PM):
 City Hall...
[Show more](#)

If you live in Prince William County, vote Monday-Friday from 8:30 a.m. - 4:30 p.m. at the:
PWC Office of Elections (9250 Lee Avenue, Suite 1, Manassas);
Haymarket Gainesville Community Library (14870 Lightner Road, Haymarket); or
DMV-Woodbridge (2731 Caton Hill Road)

If you live in the City of Manassas Park, vote Monday-Friday from 8:30 a.m. - 4:30 p.m. at City Hall (100 Park Central Plaza).



Launching a Campaign

Your campaign's official launch is the day that you announce to the public that your candidate is running. This is the single- best day you'll have to push out your message to voters and donors on your terms AND raise money. This is the day you kick off your momentum, don't squander it!

Preparing to launch your campaign begins weeks before launch day and should include your whole staff, consultants, and supporters.

Your Launch Checklist

- Campaign Message Frame
 - Candidate message frame (See Intro to Communications section)
 - Three paragraph bio/mission statement (Added to website)
 - Identify top three issue messages
 - A mom and local leader who gets your priorities
 - A record of getting things done
 - Washington is broken
- Candidate talking points
- Campaign website
- Press plan
- Press release/advisory
- Digital/social media plan
- Fundraising email

What makes a successful launch?

- Clean Rollout
- Kickstart to raise money

| | |
|--|---|
| What We Say About Us <ul style="list-style-type: none">• Teacher• Working mom• Understands region• Stands up for you• Independent• Consensus builder | What We Say About Them <ul style="list-style-type: none">• Sides with special interests• Voted to end Medicare's guaranteed benefits• Anti-choice• Out of touch• Tax breaks for corporations and the wealthy |
| What They Say About Us <ul style="list-style-type: none">• Liberal• Not a real democrat• Supports liberal policies• Tax and spend liberal | What They Say About Them <ul style="list-style-type: none">• Tough on crime• Strong supporter of armed forces• Conservative• Tough on illegal immigration |

Prepare Candidate Talking Points

- Why are you running for office?
- What do you think of your opponent
- How do you plan to win?
- Sticky issues:
 - Why did you vote for tax increases?
 - Why did you flip-flop on immigration
- Collect stories and anecdotes!!!

Press Strategies ~Psst.. It's All About the Headlines~~

- “Push out on paper” Setup an exclusive interview with a reporter
- Push for a “clean” story no back-and-forths
- Draft a press release
 - Includes announcement sentence
 - Candidate quote
 - Validator quote
 - Candidate bio/summary

The Interview

- It's “on the record” - everything you saw can be used.
- Schedule a few practice prep sessions with your candidate. Play the role of the reporter.
- RECORD THE DISCUSSION!

Launch Morning

- Let the story lead the launch, followed by everything else.
- Ideal flow:
 - Story launches midnight before launch day.
 - Pitch your story so that it gets picked up in morning political “tipsheets”.
 - Schedule your fundraising email to hit inboxes as people wake up. The release should go out at the same time.
 - Post the announcement on social media in the morning.

Fundraising

Hit the Phones and Inboxes

- Your launch is one of your single best days to raise money
- No distractions → Get your candidate on the phone with donors
- Don't be shy - send your fundraising email to EVERYONE. It will likely be your highest open rate

How do I go viral?

- Don't try to "go viral" with stunts and gimmicks. It creates unwanted distractions, rarely impresses the audiences you need to engage, and usually creates a narrative that you will have to deal with for the rest of the cycle
- If you want to create buzz be authentic
- Shoot a selfie video a few days before then post on social media to generate some chatter and an online following

Build Momentum

- Draft a long-term earned media plan with events and announcements
- Anchor them around holidays and breaking news
- Roll out your endorsements
- Hold your opponent accountable

What Doesn't Work

- Gimmicks
- Stunts
- Kickstart to raise money

Self and Oppo Research

What does it mean?

A quick guide to self-research:

Self research on campaigns at any level, it is important to understand your candidate's vulnerabilities. This can range from anything from the consequences of a vote your candidate took (if they have held public office before) to any ties to questionable figures (i.e donating to a candidate who was indicted, business partners with someone who committed fraud..) to deeply personal issues from your candidate's past (messy divorce, child with criminal record, personal bankruptcies, etc).

Role of research consultant

Your campaign will likely hire a research consultant to complete a "self research book", which usually takes a few months to complete. This means that your research consultant will look into your candidate's past and identify anything they believe could come up during the campaign. If your candidate was in the military or was a civil servant, your research consultant will almost certainly request their military records/ submit any FOIA (which stands for Freedom of Information Act and essentially means a public records request). Your research consultant may recommend your candidate seal their divorce files if there is anything that could potentially be damaging.

Self-book call

Once the research book is complete, you will host a call with your consultants, your candidate, and your partners/allies. On this call, your research consultant will go through the book and answer any questions. This helps the entire team brace themselves for the potential upcoming attacks. This call usually lasts at least one hour.

A quick guide to opposition research

Opposition research: Just like it is important to understand your candidate's vulnerabilities, it is also important to understand your opponent's vulnerabilities, which is why campaigns conduct opposition research.

Similar to how your research consultant will conduct a "self-book" they will also conduct an "opposition book", which takes a few months to complete.

Opposition research looks into the past of your opponent— some of the things your research consultant may investigate include: military record of the opponent, voting record of the opponent (if politician), divorce records, deep dive into news articles mentioning the opponent from the past, deep dive into spouse of the opponent, business dealings, debts, bankruptcies, among many other areas.

The goal of this research is to have a list of testable negative messages you can field in your next poll. This is important in order to understand what the most salient attack/message is as it relates to your opponent's policy positions and personal background. Ideally, something from your opposition research book will resonate with voters, and will be featured in your campaign's paid communication plan.

Weaponizing Research

Research can be a campaign's greatest weapon. Whether attacking your opponent's record, background/ bio, or drawing a contrast with your candidate; having a strategy for using research can ensure that your campaign wins the messaging war in paid and earned media. In evaluating the research that you commission, your communications and research teams (and consultants) can help you develop a strategy for using your research.

Here are some avenues to weaponize research:

- **Public profile as an elected official:** Controversial votes or endorsements on key policies issues or candidates, media appearances
- **Voting record as a private citizen:** Votes for controversial candidates, voting in Republican primaries, not voting in key elections
- **Social Media presence as a private citizen:** Controversial statements, questionable civic affiliations
- **Background or bio:** Financial issues, domestic issues, residency issues

There are certainly limits to weaponizing research. The following are cautions that campaigns should take when using research against your opponent:

- **Prepare for Impact:** Once a campaign launches an attack on another campaign-they should be prepared to be attacked as well
- **Avoid political landmines:** Depending on the political landscape there may be some issues that are better left alone. Some examples include children, mental health, religion, etc. All campaigns must use their own judgment to ensure that weaponized research does not have unintended, costly effects on the campaign.

Example:

CHICAGO TRIBUNE

Ryan quits race

By Liam Ford and Rudolph Bush, Tribune staff reporters, Tribune staff reporters Christi Parsons, Ray Long, John Chase and David Mendell and Rick Pea
Chicago Tribune • Last Updated: Jun 26, 2004 at 2:00 am



Expand



Divorce file unsealed Republican U.S. Senate nominee Jack Ryan's ex-wife, TV actress Jeri Ryan, accused him of taking her to sex clubs, according to records released from the couple's divorce file. Jack Ryan denied the allegations when they were made in 2000. (Tribune photo by Candice C. Cusic)



Beleaguered Republican U.S. Senate hopeful Jack Ryan ended his campaign Friday, leaving his party scrambling to find a replacement with enough money and magnetism to mount a serious challenge against Democratic candidate Barack Obama.

Ryan had been under attack by a wide range of party leaders for a lack of candor following the release this week of previously sealed records from his divorce from TV actress Jeri Ryan, giving rise to what one prominent Republican called "buyer's remorse."

Jack Ryan had fought the release, insisting he was trying only to protect his son and not to hide embarrassing information. But the files showed Jeri Ryan had accused her ex-husband of taking her to sex clubs and trying to pressure her into having sex in front of others.

Barack Obama's 2004 US Senate Opponent was forced out of the race after sealed documents leaked, revealing secrets from his divorce

Tracking

What is tracking?

Tracking refers to the filming and recording of your opponent's public appearances and digital Q&A with the goal of getting your opponent on the record surrounding a specific issue and/or making a mistake, with the goal of using these recordings for paid and earned communications.

Why is it important to get your opponent on the record?

For citations or “back-up”— when your paid media consultants begin production on your TV, mail, and digital, they will need hard evidence to support their claims, which can come in the form of: public records, written questionnaires, TV interviews, debate transcripts, and tracking footage.

Some famous examples of tracking or tracking footage:

Senator George Allen, R-VA, 2006, The “Macaca” moment

In August 2006, Incumbent US Senator from Virginia, George Allen had a tracking incident that was subsequently used in a paid comms campaign.

Sen. Allen was at a public event On August 11, 2006, where Allen used the word “Macaca” to refer to his opponent's tracker, S.R. Sidarth, who was filming an event.

A poll the following week showed Webb gaining 10 percentage points. The race, which at one point looked like a sure win for Allen, became one of the most watched and closest races of the 2006 elections.

John Stirrup, Republican Candidates for House of Delegates, District 21, “Total Abortion Ban”, 2023

One of the strongest examples of the impact of tracking at the State Legislative level during the 2023 election season was Democratic Candidate (now Delegate) Josh Thomas' campaign capturing Republican candidate John Stirrup saying he would support a total abortion ban in Virginia.

This recording was captured during the competitive Republican primary at the Republican debate hosted by a local Republican club.

After the Republican primary was over, the Josh Thomas campaign sent this audio recording to the Washington Post in August (three months after the debate took place), which the reporter used to construct his narrative



The Washington Post article, along with the recording which was posted on youtube so it could be publicly accessible and used as a citation, was used by both the Thomas campaign along with many outside groups in their paid communications where they used this soundbite as evidence of Stirrup being extremely conservative and out of touch with this educated and moderate Northern Virginia district.

August 10, 2023

The Washington Post

RECORDINGS SHOW VA. SWING DISTRICT CANDIDATE FAVORS 'TOTAL BAN' ON ABORTION



How to protect your candidate from trackers

- Make sure your candidate never speaks to the tracker
 - It is a bad look. They may shout questions to your candidate as they walk into an event, but it is critical that your candidate and your staff ignore them.
- If someone random RSVPs for a fundraiser, look them up in VAN/ on Facebook or Instagram.
 - Pay attention to behavior at fundraiser, if they begin recording, kick them out
 - If they aren't speaking to anyone and attend the fundraiser alone, they may be a tracker
 - If they are young, they may be a tracker
 - If someone starts recording, kick them out
 - If the event is at a public space, but you reserved a specific section, you may not be able to kick them out of the venue as a whole, but they may have to wait outside or may have to stand outside of your section
- Note: normally, trackers will not pay to get into fundraisers. It is important to make sure that any random people who are attending these closed-door events are actual donors. Sometimes folks who look like enthusiastic college students will ask to attend to learn more about the candidate's platform (this is probably a tracker and you should try to direct them to your campaign website or other resources)

Media prep:

- The best way to help your candidate prepare for difficult questions is to host regular prep

How to hold a productive media prep session:

1. Use your consultants! They can be very helpful when thinking through how your candidate should respond to tough questions
2. Identify areas of weakness
3. Go through your candidates' self-book— especially prepare for any tough votes your candidate has taken (if incumbent) or any other obvious areas of weakness that are easy to find PUBLICLY
 - a. If challenger, research what your opponent was attacked on; research what the Democrat last time was hit on
4. Sprinkle in Q+A prep when you are practicing your stump speech
5. Record your candidate so they can watch themselves back; if their answer needs some work, you should write out an answer they can memorize

How to track your opponent

- Find out when events hosted by the local Republican Party, your opponent's campaign team, and other local groups supporting your candidate are. Also, keep track of when Republican debates are if your opponent is in a primary.
- Recruit volunteers to attend; have at least one of them record audio.
- Host a mini training with your volunteers where you cover:
 - How to record video/audio
 - What questions to ask (if you get the opportunity)
 - Encourage the tracker to ask the questions in a private conversation (if possible)
 - The moment your tracker begins to be recognized by your opponent's team, have a different person begin to track
 - It is important that your trackers are able to be effective (once they are found out, they can track in public places such as parks or rallies, but will likely get kicked out of private events)
 - Know your rights
 - If you are in a public place where your tracker is recording your opponent and they are asked to leave— YOUR TRACKER DOESN'T HAVE TO! UNLESS THEY HAVE A PARK PERMIT
 - If you are in a private residence or business and someone asks your tracker to leave, your tracker should leave

Things to be aware of:

Primary politics

- If your opponent is in a Republican Primary, it is easier to get them on the record on issues that politicians usually skirt away from hot button issues such as social security and abortion.
 - In order to appeal to the Republican Primary electorate, your opponent may take very conservative stances, and then will likely moderate themselves post-primary.
- If you are in a Democratic Primary, the same logic as above applies. This is why having answers to questions about hot-button issues, which for Democrats include Green New Deal and Medicare for All, among many other things.

In summary:

Tracking can be a nail in the coffin for a campaign— so making sure you, your staff, and your candidate know what to do when a tracker is present is critical to ensure your campaign doesn't make a careless mistake.

On the other side of the coin, tracking is an incredible opportunity to define your candidate as extreme and out-of-touch, especially if they are in a crowded Republican primary. Making sure you have the volunteer capacity and training capabilities to execute a strong tracking program will help your campaign have the citations and quotes needed to have a successful paid media campaign.

Polling 101

Polling is a tool (tactic, method) used by campaigns to make decisions. It samples the ideas, attitudes, and opinions of the electorate. While campaigns can use polling to:

- Assess candidate viability
- Establish trends
- Test messages
- Determine target audiences
- Assess programs and campaigns
- Drive narrative publicly
- Persuade others

The main purpose of a poll is to drive strategy on your paid and earned communications. Your pollster will be the main author of the poll and driver of the polling process.

There are 3 main types of services a polling firm may offer:

- **Benchmark Poll:** Takes a snapshot/measure of the current political environment, state-of-the-race and forecasts opportunities for your campaign to grow in gaining support amongst voters you need to win by testing positives and negatives on you and your opponent.
- **Tracking Poll:** Purposefully short, and is designed to show a trend or level of support a candidate has over a period of time. It can also measure the impact of campaign communications. Campaigns can choose to do one or more tracking polls over the course of the race.
- **Focus Group:** Provide insight on how different strategies, messages, or targeting plans will work by consulting actual groups of people. Campaigns with small budgets rarely do focus groups.

Budget

The budget for a pollster should comprise no more than 10% of the total amount you intend to spend on direct voter contact. For example- if your campaign plans to spend \$700,000 on these efforts, you should have a \$60-70,000 polling budget. The bigger your overall budget, the smaller the percentage you spend on polling.

Polling Team

Most campaigns will work with a polling firm to develop, execute, and analyze a poll. In most cases, if a campaign can afford to do multiple polls- they will begin the process in the first few months of the campaign. Depending on state, caucus and compliance laws- this may be a resource that partners may be able to cover the cost.

In most cases, there will be many consultants and partners who will have a hand in helping to create, execute, and analyze the poll:

- **You:** As the campaign manager you will work with the polling team to develop the questions, confirm sample size and targets and have final sign off before the poll goes into the field.
- **Polling consultant/firm:** Leads the polling process (on the consultant side) and is responsible for administering the poll and putting together the analysis. They should deliver topline, crosstabs, and written recommendations
- **Researcher/Research firm:** They will gather/ conduct research on the district, your candidate, and your opponent that will help determine the best questions to ask. They also review the poll content for accuracy/what you can defend.
- **Mail consultant:** May weigh-in on poll development but will use results in a better-informed mail program. Helpful to know the mail universe for inclusion in the tracking poll.
- **All other media consultants:** May weigh in on poll development but will use results to better inform other programs (primarily paid media).
- [If not in primary - caucus may be involved]

Process

Below is an overview of the 5-step process of the development, execution and analysis of a poll. It typically takes about 4 weeks from first brainstorm/ drafting (step 1) to final analysis (step 5)

- 1. Draft:** Write the survey questions that you will ask during the poll. As the campaign manager- you will have the opportunity to provide input on these questions with your consultant.
- 2. Prepare to Field:** Your consultant will recommend the sample size (universe) and methodology of the polling.
- 3. Field (3-4 Days):** The consulting firm will send the poll into the field to gather the results.
- 4. Weight and Produce Deliverables (1 week):** Once the results are in, the consulting firm will produce topline and crosstabs to summarize the data patterns. This is part of the process that you should bring in your candidate.
- 5. Analyze:** What is the strategic path forward based on results? How will this affect your other paid media strategies?

Polling: Creating a Survey

Polls are comprised of a number of survey questions that are developed from a combination of factors:

- Policy Ideas
- Opposition Research
- Candidate Bio

Good survey questions:

- Assesses the political environment and defines the electorate
- Identifies the strengths and weaknesses of your candidate and your opponent
- Determines where the race wants to go
- Determines what you should say about your candidate, your opponent, how much of each, to whom, via which media

Sample questions:

- How likely are you to vote in the election?
- Do you feel like the district/ state is heading in the wrong direction?
- Do you approve of the job that (incumbent) is doing
- What key issues are important to you?
- How likely are you to vote for a candidate who (insert political position- supports increasing teacher pay)?

During the process of creating a survey, your job is to facilitate the process, not write the poll/survey questions. Get your team involved and thoughtful. Get them the research BEFORE the research call.

Before the draft

Determining how the research will be used in your polling should be a collaborative process with your entire team, from the Opp research, media, mail, digital, senior leadership, and your candidate. Buy-in on the strategy starts with buy-in on the research that guides it.

Step 1 (Call): Researcher (or manager) runs through the self and oppo research on a call – usually one whole call just for this and sometimes two

Step 2 (Call): Discussion with the whole team about themes against opponent, contrasts with your candidate

Step 3 (Call): Ideas from the whole team about issues that could impact the race, things that have worked before, areas of greatest contrast.

Step 4: Pollster compiles all the information into a draft for the team to read and review

Step 5: Drafting the Poll: The pollster may take up to a week to draft the poll

Step 6: Call to review the poll draft

Step 7: Reviews from Legal and Research

Step 8: Sign Off from Campaign Manager to put the poll in the field

Step 9: Results

** It typically takes 2 weeks after the drafting of the poll to see results from the poll**

The Impact of Effective Organizing Programs

Effective organizing programs are at the heart of strong campaigns. Like all parts of your campaign; your organizing program should be anchored by timelines and metrics to ensure you are maximizing every opportunity to contact voters

Key Elements of a Organizing Plan

- Timeline:
 - Calendar
 - Phases
- Universes + Data standards
- Metric + Qualitative Goals + Benchmarks
- Phase Planning + Messaging
- GOTV Plans

For most campaigns there are four traditional phases

- **Building Capacity and Field Planning:** Building your volunteer base and infrastructure; voter registration
- **Persuasion:** Talking to voters who are undecided about supporting your candidate
- **Mobilization:** Helping voters make a plan to vote; Motivating them to go vote during the Early voting or vote by mail windows
- **GOTV:** the final few days before Election day where any voters who have not voted early are encourage to vote
- ****At the legislative level planning and persuasion can last all cycle****

Important Notes

- As your universe changes, so will your scripts, trainings, and goals
- While planning out is important, you'll also have to be flexible
- The only immovable date is Election Day

Organizing (Field) on State Legislative Campaigns

Candidate Work

The Role of a Candidate in Organizing

- Our candidates are our best persuaders
- Candidates should be telling their personal story directly to a targeted universe of voters via:
 - Persuasion doors (blended, persuasion dense universes)
 - 3s chase
 - Clincher Cards
- We can also think about ways to strategically use them for volunteer recruitment and retention

Candidate goals should focus on specific persuasive touches within our universe Returning to the candidates role in the field

- Doors
 - Candidates should also be attempting any voters in the persuasion universe to generate more IDs and persuade more voters.
 - This will be prioritized differently depending on how many 3s you already have.
- 3s Chase
 - Chasing 3s: Any time a volunteer or staffer identifies a voter as persuadable (i.e. a 2, 3, or 4). The candidate should follow up with a phone call.
 - Your candidate can make a personal appeal.
 - Setting Metrics: Candidate Goals should be determined by taking the work done so far and extrapolating out from your conversion rate.
- Clincher Cards
 - After any conversation, the candidate should take notes on what they and the voter discussed. This then becomes a “clincher card”.
 - In an ideal clincher card program, one postcard goes out right after the conversation and one goes out when polls open.
 - Setting metrics: The goal should match the current stockpile of conversations plus the anticipated contact rate over time.

- Clincher Cards Explained
 - The most important thing a candidate can do for this program is take detailed notes.
 - Volunteers can write those notes into postcards if need be.
 - This is an important additional metric while we cannot knock doors. Setting goals/timelines for candidates is critical.

Organizing Buy-In

We know field (organizing) wins. Not all of our candidates understand why.

Four Types of Organizing Buy In

- Metric/Vote Goal
- Story-driven
- Past campaigns
- Past conversations

Ask yourself: Who is my candidate and what drives them?

Metric and Vote Goal Buy-in

- These candidates could respond to:
 - Topline Win Number + Vote Deficit information
 - Weekly ID tracking or ID goals
 - Conversion Rates

Community and Story-Driven Buy In

- These candidates could respond to:
 - Organizing plan + goal reviewing
 - Qualitative share outs from volunteers
 - Adding in thank you calls or flake calls into their rotation of DVC

Past Campaign Lore

- These candidates could respond to:
 - Field margin win reminders
 - Reference close races won on “field margins”
 - Stories of local campaigns who did creative things to hit goal
 - Calls or check-ins from incumbents to reinforce their goals

Candidate’s Past Experience

- These candidates could respond to:
 - Reminders of notes they wrote in past shifts
 - Reminders of times they bonded with volunteers
 - Repeat Conversations with folks they’ve persuaded
 - Reminders of their own past volunteer work

Your candidate’s story may help you determine how they’ll get bought in.

Re-Establishing Buy-In

- Over the next three months buy-in will need to be re-earned.
- Ask yourself: What have you shared with your candidate?
 - Do they know the full plan?
 - Do they get regular updates?
 - Do they know what metrics you’re tracking and why?
 - What do they prioritize in a read-out?

Setting Metrics

- Be mindful of the candidate’s larger schedule.
- How many calls do they make an hour?
 - Does this change for cold calls vs. chase calls?
- How long does writing up notes after the calls take?
- Think through the sequence of your campaign to balance hours on field vs. hours in finance. Adjust goals accordingly.

It's easy for candidates to miss the forest for the trees.

Remember: Who are they receiving feedback from?

Things that move the needle.

- Relationships, connections, and real one-on-one conversations.
- This can also include volunteer retention!

Things that can cause well-meaning concern.

- Lack of “viz”, lack of presence at “blue dog Dem” events.
- Remember: identify where your candidate is getting feedback from early!

What if the candidate isn't living up to their end of the bargain?

Establishing Motivators

- Metric driven
 - Give them regular reminders of where they stand on their daily or weekly goals.
 - Read them into the campaign's progress overall.
- Story Driven
 - Be sure their day has some connecting element. Whether that's dropping in on a volunteer event for a few minutes, intentional daily debriefing, or thank you calls to volunteers.

Candidate Accountability

- Always go back to how you got their buy-in.
- Know if it's a “people” problem or a “process” problem.
- Create more regular check-ins on the goals specifically.
- Consider increased “staffing” (even virtually).
- Know when you have to set some new norms or expectations.
 - Remember your “Know”, “Feel”, “Do”.

Data & Targeting 101

Creating a targeted universe of voters for your campaign helps to ensure that you are talking to specific, likely voters who can help your candidate win-especially in local elections where turnout tends to be lower. It will also help inform your strategy on how to use your resources (organizing personnel and volunteers, your candidate's time, and paid communications- digital, TV mail) most effectively.

Universes and Data by Phase

- District Make-up: Who the voters in the district are. Important to use in determining vote history, trends, population increases, or key demographics.
- Universe of targets: Who in the district do you want to be talking to during a specific time? Focused on getting IDs and overall conversion rates.

Why do we target specific universes?

- We do not have the time or resources to talk to every voter in a district.
- We do not want to talk to every voter in a district.
- Different conversations make sense at different times.

What data do we use to target?

- Support and turnout scores.
- Demographic data (like gender, age, race/ethnicity).
- Vote history.
- Data we've collected.

Universe by Phase

| Phase | Universes | |
|-----------------------------|------------|---------|
| Volunteer Engagement | Base | |
| Persuasion | Persuasion | Blended |
| Mobilization | Blended | Base |
| GOTV | GOTV | GOTV |

| | |
|------------------------|-----------------|
| GOP TURNOUT | GOP BASE |
| GOP/DEM TURNOUT | DEM BASE |

| 2021: DLCC State House Support | 2022:DNC/DCCC Clarity National Turnout | | | | | | | | | | | Total People |
|--------------------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|
| | 0 to 9.99 | 10 to 19.99 | 20 to 29.99 | 30 to 39.99 | 40 to 49.99 | 50 to 59.99 | 60 to 69.99 | 70 to 79.99 | 80 to 89.99 | 90+ | Unknown | |
| 0 to 9.99 | 29 | 105 | 88 | 53 | 74 | 137 | 165 | 218 | 1,619 | 3,768 | 0 | 6,256 |
| 10 to 19.99 | 67 | 274 | 108 | 88 | 194 | 183 | 188 | 320 | 1,168 | 1,077 | 0 | 3,667 |
| 20 to 29.99 | 103 | 413 | 160 | 151 | 298 | 203 | 210 | 389 | 1,063 | 547 | 1 | 3,538 |
| 30 to 39.99 | 206 | 524 | 166 | 251 | 336 | 209 | 214 | 441 | 897 | 389 | 0 | 3,633 |
| 40 to 49.99 | 399 | 587 | 181 | 351 | 360 | 212 | 219 | 469 | 889 | 305 | 0 | 3,972 |
| 50 to 59.99 | 473 | 635 | 180 | 410 | 329 | 219 | 201 | 480 | 793 | 259 | 2 | 3,981 |
| 60 to 69.99 | 402 | 602 | 239 | 487 | 280 | 227 | 208 | 472 | 769 | 248 | 0 | 3,934 |
| 70 to 79.99 | 479 | 583 | 290 | 531 | 300 | 307 | 210 | 442 | 858 | 321 | 2 | 4,323 |
| 80 to 89.99 | 470 | 544 | 325 | 492 | 280 | 279 | 277 | 460 | 1,337 | 653 | 0 | 5,117 |
| 90+ | 158 | 246 | 251 | 374 | 323 | 423 | 420 | 651 | 3,338 | 1,929 | 2 | 8,115 |
| Unknown | 16 | 297 | 703 | 442 | 250 | 125 | 291 | 159 | 141 | 22 | 2,235 | 4,681 |
| Total People | 2,802 | 4,810 | 2,691 | 3,630 | 3,024 | 2,524 | 2,603 | 4,501 | 12,872 | 9,518 | 2,242 | 51,21 |

| | |
|----------|-------|
| Dem Base | 7,257 |
| GOP Base | 7,632 |

| | |
|------------------|-------|
| Total Population | 51,21 |
|------------------|-------|

| 2021: DLCC State House Support | 2022:DNC/DCCC Clarity National Turnout | | | | | | | | | | | Total People |
|--------------------------------|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|
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| 10 to 19.99 | 67 | 274 | 108 | 88 | 194 | 183 | 188 | 320 | 1,168 | 1,077 | 0 | 3,667 |
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| 30 to 39.99 | 206 | 524 | 166 | 251 | 336 | 209 | 214 | 441 | 897 | 389 | 0 | 3,633 |
| 40 to 49.99 | 399 | 587 | 181 | 351 | 360 | 212 | 219 | 469 | 889 | 305 | 0 | 3,972 |
| 50 to 59.99 | 473 | 635 | 180 | 410 | 329 | 219 | 201 | 480 | 793 | 259 | 2 | 3,981 |
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| Unknown | 16 | 297 | 703 | 442 | 250 | 125 | 291 | 159 | 141 | 22 | 2,235 | 4,681 |
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|------------------|-------|

| | | | | | |
|-------------|--------|-------------------|-------|----------------|-------|
| Base Tier 1 | 7,257 | Persuasion Tier 1 | 3,263 | Turnout Tier 1 | 1,912 |
| Base Tier 2 | 2,732 | Persuasion Tier 2 | 3,990 | Turnout Tier 2 | 1,442 |
| Base Tier 3 | 907 | Persuasion Tier 3 | 1,120 | Turnout Tier 3 | 2,054 |
| | 10,896 | | 8,373 | | 5,408 |

Turnout T4: 3,484

We should think of every conversation as moving people further into our corner.

Persuasion conversations start with an open ask for support.

Mobilization conversations start with an assumption of support.

Persuasion Communication

- Pure persuasion
 - Who (Universe): Tiered persuasion
 - When (Phases): Persuasion
 - What (Modes): Modes that do not require density: phones, texts, clincher cards, etc
- Blended universes
 - Who (Universe): All persuasion targets + some mobilization
 - When (Phases): Persuasion + Mobilization – but the blend shifts
 - What (Modes): Doors + Texts (think density)
- 3's chase
 - Who (Universe): Identified 3's
 - When (Phases): Now - Election Day
 - What (Modes): Calls or clincher cards from the candidate or a key validator

Mobilization Communication

- Mobilization
 - Who (Universe): Low propensity, high support targets
 - When (Phases): Mid-September, early October through October
 - What (Modes): Doors, phones, texts – all volunteer
 - Remember: what works best here are making a plan conversations.
 - How far in advance can you realistically make a plan?
- Pure Turnout (GOTV)
 - Who (Universe): An altered mobilization universe with persuadables dropped.
 - Your GOTV universe will be the most important targets based on who you can talk to twice over four days. (Let's make a plan!)

- When (Phases): The final four days, an iteration may be used for Dry Runs.
- What (Modes): All doors, all day! (And texts, and phones, and relational.)
- Blended universes
 - Note that you'll use a blended universe during Mobilization as well. But the universe will start to shift from high persuasion with mobilization added for density to high mobilization with persuasion added for density.
- Takeaways
 - District populations are finite: layering and coordination are extremely important
 - Candidate and volunteer work bring different things forward.
 - With new technologies, our programs have to be even nimbler than ever before.

Questions to ask as you look at your district

- What buckets have the best contact information?
 - Phone, email, etc
 - How can we get them? (Answer: Relational + Leadership!)
- What areas of the district are heaviest on persuasion? On turnout?
- How will you track universe saturation?
- Where will you go to make your universes bigger or smaller?

Determining Vote Goals

- Vote Goal: The number of voters we need to win
- Calculating District Vote Goals
 - Population
 - Turnout prediction
 - Win Number
 - Democratic Base
- When you're aiming for 50% + 1, field is +1
- Win number - Dem Base = Vote Deficit
- Reminder: goal setting is half science, half art
 - The best programs set goals between these numbers and what you know you can do

Finding our Vote Deficit

| Scenario 1 - Civis: | Scenario 2 - Targetsmart |
|---|---|
| <ul style="list-style-type: none">• Population: 71,802• Turnout: 49,812 (69%)• Win Number: 25,902• Base at 70x70: 17,610• Vote Deficit: 8,292• Field VD: 4,146 | <ul style="list-style-type: none">• Population: 71,802• Turnout: 53,615 (75%)• Win Number: 27,880• Base: 16,721• Vote Deficit: 11,159• Field VD: 5,580 |

Goal Setting

Using Benchmarks:

- Why do we set goals by phase instead of cycle-long?
- Why are benchmarks important?
 - Set benchmarks in your planning calendar to check on your progress
 - Things are changing quickly this cycle: timelines need to be nimble
 - We will be trying new tactics so follow-up and benchmarks are key
- What does this look like?
 - Evaluating the initial goals from the phase that is ending
 - Looking ahead to what you initially thought the following goals (both buckets and metrics) would be
 - Update based on your findings so far
 - Report out to stakeholders and raise urgency with staff
- Benchmarks also act as key moments in your calendar for stakeholders, candidate management, and staff accountability.
- Think one step ahead
 - Everything should think ahead to GOTV and be focused on your vote deficit
 - Do the metrics you're tracking speak to what is coming next?
 - Are there qualitative goals within the phase that staff need to be aware of?
 - What are your plans for accountability and how do these goals fit in?
- Strategic: Positive IDs converted from each universe
- Controllable: The total number of dials, doors or shifts

Planning Phases- Non Primary

In order to get everything done, we plan things out in phases

| | Phase 1: April-June | Phase 2: July- Early September | Phase 3: Early Vote Onward |
|------------------|--|--|--|
| Focus | Getting our teams online | Persuasion through our networks | GOTEV |
| Vote Math | Initial Calculations, goals built to test capacity | Reset math with new turnout expectations, set ID goals for persuasion | Reset math with final turnout expectations, set ID and GOTV goals |
| Metrics | <ul style="list-style-type: none"> Attendees Events IDs Leadership Prospects | <ul style="list-style-type: none"> Confirmed Leaders Action Shifts Conversations + IDs Commits | <ul style="list-style-type: none"> DVC! Shifts completed Staging Locations Commits |

Cycle-long metrics

- Supporters (1s and 2s contacted)
- Persuasion chase (phones, text, letters/clincher cards)
- Contact rate by method
- Volunteer leadership development

Goal Setting: Things to consider

- 100% contact is unlikely. How do our targets take that into account?
- How many numbers are on the file? How many passes does it take to talk to those contacts?
- So -- how do we track down our top targets who don't have numbers?
- How can we use relational organizing? Digital? SMS?

Every metric should be geared toward expanding our universe of supporters

More than DVC

- Think through how you expand your universe of supporters
- How are you using your supporter networks? Where are key communities meeting online?
- Where does volunteer leadership and strategic training fit into your program?

Goal Setting Week by Week

- Goals should push your team, but be attainable.
- Set modest rates for tools we don't know as much about.
- Set goals for volunteer, candidate, and staff work.
- Cycle-long goals + tracking
 - Contact Rate: How many passes of our universes does it take to contact those voters via different methods?
 - Conversion Rate: What percentage of those folks will support our candidate?

Building Constituency Groups + Volunteer Recruitment

Building a strong grassroots campaign requires a strong volunteer base and constituency outreach program that can reach key voters that you need to turn out to vote.

Grassroots Volunteer Activities

The best and most effective way to engage volunteers is to recruit them for direct voter contact events. Below are the most common types of grassroots volunteer events.

- Voter registration
- Canvassing
- Phone banking
- Text banking
- Relational organizing
- TV, Digital and Mail shoots

Grassroots volunteer Recruitment

If your candidate is a current or former elected official; they may have an existing volunteer list. Here are some additional ways to generate more volunteer leads

- Email Lists
- Social Media Engagement
- Community groups and organizations
- Existing databases

Volunteers help us win elections ...but only if recruited properly and purposefully....and re-engaged

Best Practices for Volunteer Recruitment

- Practice making the “hard ask”. It only gets easier with time.
- Make volunteering seem social and fun.
- Leverage existing relationships -- having volunteers recruit friends through phone calls or social media can boost recruitment rates.

- Make volunteers feel valued and mean it! -- Use language like, “We can’t do it without you!” to get to the heart of why volunteers choose to contribute their time
- Avoid transactional incentives and automated asks -- offering gifts like bumper stickers can actually lower recruitment rates.

Running Volunteer Events

- Make confirmation calls and send text reminders.
- Make your space/office /staging location conducive to volunteer productivity
- Have defined roles so people feel like they are part of something larger.
- Create a sense of community -- perhaps by partnering volunteers with each other. People stay because of relationships and for a sense of belonging.
- Set clear goals (that are achievable) but motivating (i.e. a bit of a stretch) with clear deadlines.
- Thank volunteers, follow up, and gather feedback (make them feel valued).

Sustainability

Campaigns are a marathon, not a sprint. You want your volunteers in it for the long haul and committed to doing the work! Planning for sustainability will help you to develop leaders. No team or campaign can be built on 1 person. PLAN for leadership development and succession. Here are a few ways to prevent volunteer burnout

- Assess volunteers’ current and growing capacity to lead. Not every volunteer starts off a supervol but every volunteer has the capacity to grow
- Schedule weekly or bi-weekly team meetings and 1:1s with your team leaders. This practice will go a long way in relationship building and team morale!
- Provide space for feedback. And never be afraid to change what isn’t working.
- Celebrate your volunteers and volunteer leaders. Parties, shout-outs, thank you notes, gifts, show your volunteers that you appreciate their hard work!
- Remember, your volunteers are humans too!: Honor milestones and check in on life transitions

Constituency Organizing

By assessing the demographic and cultural landscape of your district and meeting with stakeholders your first couple of weeks on the ground- you can identify key groups and communities that may be supportive of your candidates. African Americans, Latinx, Faith communities and Teachers are just a few examples of groups which the campaign's message may resonate with.

In many cases, these groups may already be organized around their traditional convenings and events so it may be best for you to engage existing leaders and find out how best to plug them into the campaign. Cultural competence is key. Constituency events may include:

- Souls to the Polls
- Community roundtable events with faith leaders
- Barbershop and beauty salon visits
- In language phonebanks
- Greek Letter organizations (members only phone banks)

Remember! Volunteers come for the candidate and the cause, but they stay because of their experience (or the campaign/organizer/staffer)

Working with Coordinated Campaigns

What is a coordinated campaign?

A coordinated campaign is a legal structure within a state, by which multiple federal, statewide, and local campaigns (Presidential, US Senate, Gubernatorial, Legislative, etc.), in conjunction with the state party and occasionally with the direction and influence of the national party, combine resources (financial and personnel) and strategy to elect a slate of candidates.

Depending on the election cycle and the state, coordinated campaigns can be structured in a number of different ways and have number of different influential stakeholders, but the goal is to maximize the universe of voters that a campaign can talk to through paid media and organizing.

Because coordinated campaigns are typically anchored by the state party; in some cases a state legislative campaign may benefit from the robust investment from top of the ticket races.

Despite this investment, your campaign will still be responsible for raising your candidate's name ID and earning support from voters.

Here are the following ways that a coordinated campaign may impact your campaign:

- **Messaging + Communications:** The coordinated campaign may employ a specific messaging frame that includes messaging that is popular amongst the majority of Democratic voters.
- **Voter Targeting + Voter Contact:** The coordinated campaign may invest in field organizers that will contact a universe of voters that may overlap with your campaign's universe. Direct Mail: The coordinated campaign may have a specific universe of voters that receive persuasion, vote-by-mail, or GOTV mail.

Working with Allies

Who are your partners and allies?

As mentioned earlier, an essential role as a manager is to manage not only your direct reports and consultants but your partners and allies as well.

Your partners and allies are essentially organizations with a vested interest in your race.

Listed below are the ways that partners and allies can help campaigns:

- Contributing directly to campaigns via a PAC check
- Contributing indirectly to campaigns by hosting a fundraiser or bundling checks
- Connecting your candidate to other potential partners and allies (other elected officials, other organizations, individual donors, etc)
- Directly paying for an organizing program that supports your campaign
- Sending volunteers to your district for GOTV
- Giving your campaign strategic advice
- Independent expenditure on behalf of campaigns (mail, TV ads, digital ads)
- Note: coordination laws are different in every state.

Examples of partners and allies

- EMILY's List
- State House Democratic Caucus
- DLCC
- Planned Parenthood Action Fund
- Swing Left
- Sierra Club
- New Politics
- VoteVets
- 314 Action
- Human Rights Campaign
- AIPAC/J Street
- Latino Victory
- BOLD PAC
- Congressional Black Caucus (CBC)
- Congressional Progressive Caucus (CPC)
- League of Conservation Voters (LCV)

Building rapport with your partners and allies locally and nationally

Given the financial and strategic deliverables partners and allies could potentially provide your campaign with, it is extremely important for a campaign manager to strengthen and maintain relationships with partners and allies.

***Some ways you can build rapport with statewide and national partners: ***

- When you get on the ground, have an introductory call with your partner organizations.
- Depending on the partner, plan on calling them between once a week and once a month, depending on their involvement. Some partners should be included on your weekly team call, such as the House Democratic Caucus and EMILY's List.
- Twice a month, send an update email to your partners and allies where you go over any campaign happenings. This email could include:
 - Recent endorsements
 - Recent events (include pics from canvass launch/ town halls)
 - Upcoming key dates
 - Debates
 - Filing deadline(s)
 - Fundraising deadline
 - Press updates
 - Link to positive stories about your candidate/ district
 - Opponent updates
 - Controversial votes taken recently
 - Their fundraising update
 - Link to negative stories about your opponent
 - Campaign needs
 - Volunteers
 - \$ Before end of quarter
 - Support with upcoming fundraiser
- The reason we send these emails out is because your partners and allies have limited resources available to split across many priority races. Your partners and allies are only going to invest in races that are running strategic campaigns, so it is important for you to advocate for resources and communicate your campaigns' needs and wins.

Ways local partners can help

As a campaign manager, you may be going into a community that is new to you– it can take a second to get the lay of the land politically! Using your local partners to both bolster your volunteer efforts and to help with other various tasks using their local knowledge will help ease your capacity as a manager.

Some examples:

- Press validators
 - Use local Dem groups/ local chapters of larger organizations (local planned parenthood, local unions, local Sierra Club, etc) in the press where it makes sense, such as hosting standups to critique opponent.
 - These groups can also be helpful in getting a letter to the editor landed
- List building
 - Certain local groups may be able to help with list building in the following ways: traditional fundraising, digital fundraising, and volunteer lists.
- Volunteers for GOTV
 - Rely on your local partners to help you recruit volunteers! Or to host their own canvas– this can be a great way to expand your volunteer network!

How much information do I share with my partners?

- Be sure to align with your candidate before you share any sensitive information with partners
- There is a great range of involvement from partners and allies. Generally, the most involved partners are the ones who offer coaching and strategic advice at the staff level, such as the State House Democratic Caucus and EMILY's List. You should aim to speak with these partners once a week.
- Additionally, these partners are going to want some visibility into your campaign's budget and key decisions your campaign is making. It is important to preview that relationship dynamic to your candidate so they don't feel like they are being undercut.

Vote by Mail

Vote by Mail (VBM) is a form of Absentee & Early Voting (AVEV). It is one of the oldest forms of AVEV, with a long history. Recently, many states have shifted to encouraging higher vote-by-mail participation. Depending on your state, vote-by-mail may be a part of your GOTV program.

Regulations on **who** can vote by mail and **when & why** they can do so vary by state.

Types of States:

- **All-Mail:** All Voters Automatically Receive Mail Ballots
- **No-Excuse VBM:** Any Voter can Request A Ballot with no excuse required
- **Excuse-Required VBM:** To request a Mail Ballot, the voter must provide a valid reason they cannot vote in person on election day.

Benefits of VBM

- Increase Voter Turnout
- Vote Banking & Reducing Volume of GOTV Universe
- Increased Accessibility

How does VBM Support other parts of the campaign?

- **Persuasion:** Changing & Cementing Vote Choice
- **VBM:** Banking Supporter Votes Early
- **GOTV:** Getting Remaining Supporters to Polls

Vote By Mail Process

- Each Vote By Mail transaction is available in data from state election officials. This includes:
 - Transaction Type (Request, Ballot Sent, Ballot Return)
 - Transaction Date
 - VoterID
- This data is collected by voter file providers and provided in regular updates.
- These updates can be as frequent as daily, but may be as infrequent as weekly.
- This data is usually available in VAN/VoteBuilder, and data warehouses.
- This Takes Time! (Requests & Returns happen before you see the data!)
- This data allows you to alter your universe

Targeting VBM

- VBM is effective across all demographic groups but most effective among older voters
- Multiple waves of VBM mail to the same universe is effective, but with diminishing returns
- People who voted by mail previously are likely to do so again
- Be Mindful of Permanent Absentee Voters

VBM Creative Best Practices

- Provide the actual application form
- Provide voters with pre-addressed postage-paid return envelope
- Pre-filling voter names/addresses on application form increases impact and risk
- Black and white mail tends to be more effective
- Process oriented and non-political mail tests to be most effective
- Specific language:
- Social normative/social pressure language increases impact
- Track Ballot Links increase comfort

Role of Paid Comms

What do we mean when we refer to ‘paid communications’?

Paid communications refers to the following mediums:

- Television ads (cable, broadcast, streaming)
- Digital (Facebook, Google search ads)
- Direct Mail (persuasion, turnout)

Why do campaigns spend millions of dollars on paid communications every cycle?

- The main goal of any campaign is to raise your candidate’s name identification (how well voters know/ are familiar with your candidate)
 - While there ARE other ways to raise a candidate’s name ID via “earned media”, paid communications is both the most targeted and is the medium where the message is completely controlled by the campaign

How do my paid media consultants fit into my campaign team?

- While the primary function of paid media consultants is that they are vendors for your campaign that produce a product, a secondary but equally important role of paid media consultants is to serve as strategic advisors.
 - Your consultants work with many other candidates across the country– they’ve seen it all! If you ever need someone to problem solve with, your paid media consultants are a great resource

What guides my campaign’s paid communications message?

- Generally, across all mediums (television, digital, and mail), your consultants will rely on polling data and focus group findings to ensure your campaign’s ads and mail are on-message

Questions to ask

- **Who are my audiences?**
 - Are there groups of people that my candidate needs to persuade or turn-out in order to win?
- **What is my budget**
 - How much can we allocate toward each medium? (Sometimes, you have to pick one or two mediums because of budget restrictions)
- **What is my creative**
 - Does the “creative” (ads and mail) message reflect the polling data?

TV 101

Television and campaigns: a brief summary

Television advertising has been a key communication tool for campaigns for years and continues to be the largest line-item in congressional and statewide campaign's budgets. Even in modern times, despite the declining viewership on broadcast and cable networks, television is still the most effective way to reach voters.

Why is TV so expensive?

Various factors impact the price of your TV program.

Media market activity: A media market refers to a geographic area where the population can receive the same (or similar) television and radio station offerings, which includes receiving the same advertising.

- **Example:** If you were in, say, Phoenix during the 2022 election, a lot of campaigns, including a Senate and Governors race along with several congressional races were competing for advertising space, which can make the market more expensive.

Population of media market: two of the most expensive media markets in the country are New York and LA followed by Philadelphia, Chicago, Dallas, and Houston. These are also the most populated cities in the United States. One “point” of television therefore reaches more people, which contributes to the higher price.

Role of Media Consultant

- **Creative / Ad Maker**
 - Your media consultant is in charge of creating a media plan, which is a weekly breakdown of how they are planning on spending their designated budget
 - This will include the # of points/ the total spend on:
 - Broadcast
 - Cable
 - OTT/CTV/Streaming
 - Radio
 - Programmatic
 - Your media consultant will work with a “buyer”, who coordinates the buys with each station or platform

- Your media consultant is also responsible for your candidate's **television shoot**, which is when ads are filmed. From start to finish, your media consultant will:
 - After initial polling and research results come back, talk to your team about possible directions for your candidate's paid media campaign
 - Draft scripts and circulate them to the team for feedback
 - Work with the campaign manager to get scripts approved
 - Communicate with the campaign manager on location scouting and recruiting extras for shoot. Your media consultant will provide you with a list of people, places, and things needed for shoot day.
 - It is the responsibility of the campaign to recruit people and locations for your shoot
 - The shoot is one of the largest expenses of your campaign. You play a critical role in the success of your shoot
- **General political strategy**
 - While media consultants may be paid to make and place ads, they are also an important political advisor beyond the scope of television just like your polling and mail consultants. You should lean on them for questions on politics, earned communication, campaign management and more.
 - It doesn't cost you anything to seek their advice. Just like your polling and mail firms, media consultants earn their fees as part of the commission structure when ads are placed and there is not typically any type of retainer paid. You should lean on them long before paid communication begins in your race.

What are the different mediums of TV advertising? How do media consultants know how much to spend on each medium? What are the pros and cons?

- **Broadcast**
 - **Pros:**
 - **Wide reach:** Broadcast TV has the potential to reach a large audience, making it an effective medium for mass marketing. Broadcast networks have broad coverage and can reach millions of viewers simultaneously, allowing candidates to deliver their message to a wide range of demographics.
 - Broadcast television remains the most effective paid media to boost your candidate's name ID

- **Targeting:** While broadcast TV has a broad reach, it also offers targeting capabilities. Advertisers can choose specific time slots or programs that align with their target audience's characteristics and interests.
- **Cons:**
 - **Price per point:** Buying ad space on broadcast is extremely expensive.
 - **Large geographic market:** When communicating on broadcast television, unless you are running a statewide race, you will inevitably communicate with many people who cannot vote for your candidate.
 - For example, the New York City media market expands over fifty miles outside of Manhattan into New Jersey, Connecticut, and the NYC suburbs. If you were working for a candidate in Long Island and placed a buy on broadcast, voters in two different states would also see your candidate's ads.
- **Cable**
 - **Pros:**
 - **Price per point:** Buying ad space on cable TV is typically more cost-effective than broadcast television because cable advertising rates are often lower than those of broadcast networks.
 - **Targeting:** Cable TV offers a wide range of channels catering to various interests and demographics, so advertisers can select specific cable channels that align with their target audience.
 - **Smaller market:** Cable markets are typically geographically smaller than broadcast markets.
 - **Cons:**
 - **Limited reach:** compared to broadcast, cable has a much lower viewership and reach.
- **Streaming**
 - **Pros:**
 - **A growing medium:** The share of light TV viewers and cord-cutters is growing. 80% of households currently own a smart TV.
 - **Data Availability:** You can use real-time data to adjust and optimize buys across both TV and digital platforms.
 - **Targeting:** While you can use streaming services for amplification of your broad campaign message, it is possible on some platforms to target by geography, demography, and 1:1 targeting.

- **Cons:**
 - **Amplification is key:** Streaming does not have the reach or ability to deliver the frequency needed to fully “burn in” a message, so it should be purchased as part of an overall communications plan.
 - **Lack of Competitive Tracking:** The FCC does not require political streaming buys be publicly accessible, so it is very challenging to see what your opponents are spending on streaming services.

Example Gross Rating Points Calculation

| Program | # Spots | W 25-49 Rating | = GRPs |
|------------------------|---------|----------------|--------|
| Good Morning America | 3 | 2 | 6 |
| Today Show | 5 | 3 | 15 |
| 6pm News | 5 | 8 | 40 |
| 11pm News | 5 | 6 | 30 |
| Total GRPs = 91 | | | |

| Program | \$ per Spot | W 25-49 Rating | = CPP |
|----------------------|-------------|----------------|----------|
| Good Morning America | \$300 | 2 | \$150.00 |
| Today Show | \$500 | 3 | \$166.66 |
| 6pm News | \$1500 | 7.5 | \$200.00 |
| 11pm News | \$2000 | 6.4 | \$312.50 |

Note: Sixty Second spot Cost Per Points are double.

How Much Do I Need to Put Behind a Spot?

The environment you are advertising in matters and can vary widely from market to market and district to district. Cable penetration rates and cost efficiencies can vary just as widely. As a general rule of thumb, research has shown that **1,200 to 1,500 GRPs** can both increase recall and awareness as well as create behavior change. This is the ideal space you want to put behind each spot in your media plan.

Some important things to align with your media consultant on:

- **Budget:** Based on the district, any outside group reservations
- **Wire Schedule:** In most cases, stations will require full payment the Thursday before your ad is scheduled to run. Normally that wire is due to the media consultant on Wednesdays or Thursdays. You should work closely with your finance director and media consultant to ensure your campaign has the appropriate budget and cash flow to execute your plan.
 - Note: Most electoral media buys run Tuesday to Monday.
 - **Before the first wire, make sure to call your bank!**
 - Many banks have wire limits— you should know what they are, and if you need to raise them, do so BEFORE you start spending
- **Competitive** – The competitive is basic tracking of our opponent and allies media spending. Your media consultant will provide the competition in real time. The competitive helps inform strategy. For example you might use the information to adjust your media plan. You might add money to a market where a competitor is active or you might include Spanish language radio or television to your plan.
 - The FCC Requires stations to report political spending in the station’s Public File.
 - Digital does not have that level of regulation. Some platforms such as Google and Facebook have reporting tools but others vary widely.
 - Below is a sample competitive:

All Competitive Summary
(Last updated on: March 29, 2021 5:12 PM)

| State | Racetag | Medium.. | State % | Market | Party | Advertiser | Target Audien.. | Day of Flightweek Startdate | | | | | | |
|---------------------------|---------|---------------------------|---------|--------------|-------|----------------------|-----------------|-----------------------------|------------------|------------------|------------------|------------------|----------|--|
| | | | | | | | | 3/23/2021 | | 3/30/2021 | | | | |
| | | | | | | | | GRPs | Dollars | GRPs | Dollars | | | |
| NY | Mayor | TV | 68.7% | New York, NY | D | New York For Ray Pac | General | 202 | \$346,508 | | | | | |
| | | | | | | Ray Mcguire | General | 80 | \$125,913 | 76 | \$120,123 | | | |
| | | | | | | Shaun Donovan | General | 75 | \$113,998 | | | | | |
| | | Market Party Total | | | | | | | 357 | \$586,419 | 76 | \$120,123 | | |
| | | Radio | | | 0.0% | Radio-New York | D | Ray Mcguire | Afam | 28 | \$12,570 | 24 | \$10,774 | |
| | | | | | | | | | Latino | 72 | \$11,314 | | | |
| Market Party Total | | | | | | | 100 | \$23,884 | 24 | \$10,774 | | | | |
| Grand Total | | | | | | | | 457 | \$610,303 | 100 | \$130,897 | | | |

Typical Ad Making Schedule

This is meant as a rough guideline. Each campaign will work on their own schedule to conduct research, produce content, and communicate with the electorate. It is the campaign manager's responsibility to ensure that this is a seamless schedule that works for the candidate, the campaign, and the various consultants involved in the processes.



Tips on Working with Your Media Consultant

- Time is money.
 - While shooting, you want to ensure the crew does not go into overtime (unless it is previously budgeted).
 - In the editing studio, the clock is running at upwards of \$500 per hour. Be clear about your timeline, edits, and approval.
- Edits are free at the scripting stage.
- Changes get progressively more expensive as the product is closer to complete. For example, re-recording a voiceover, swapping out graphics and changing your mind about a spot will incur big costs.
- Rush HD shipping is expensive and unnecessary with a little bit of old-fashioned planning. Avoid it at all costs. Standard overnight shipping will work in almost all cases.
- Planning is critical. The more lead time, the better for cost savings.

Types of Ads

- **Bio/Intro Ad** – This is normally the first spot your campaign will run. It introduces your candidate.
- **Contrast/Comparative** – This type of ad will dedicate some time to your candidate’s positive messaging and contrast that with a negative message about your opponent.
- **Negative/ Attack Ad** – This type of ad is intended to educate voters about your opponent’s record and/or policy positions.
- **Third Party Validator** – In both positive and contrast messaging, it is sometimes helpful to use a third-party validator to help make your case.
- **Shot ad vs studio produced ad** – Your team may opt to produce a studio ad with a voiceover as opposed to using footage from your shoot. This will depend on the goals and tone your campaign is trying to achieve.

Digital 101

The world of digital has evolved over the past few years to cover a variety of tactics and mediums to reach voters quickly and effectively.

Today, the most viewed channel on TV is YouTube, and many younger voters watch clips of TV shows on their phones. Social media is increasingly a broadcast channel populated with short-form, vertical videos. Algorithms continue to drive attention, which is increasingly curated by micro-influencers with their own niche audiences.

You, as a campaign manager, are overseeing directly or indirectly your candidate's brand and audiences online. Whether it's an email, social media post or targeted paid ad; good digital programs are about meeting voters where they are. Depending on the size and scale of your campaign and your budget; you may utilize a few or all of these digital mediums.

Goals: persuasion, mobilization, and organizing.

There are four main categories of digital and their primary uses:

- Paid Media (persuasion, mobilization, and fundraising)
- Social Media + Website (persuasion, mobilization, fundraising)
- SMS (fundraising and mobilization)
- Email (fundraising and mobilization)

Why Digital

Through use of these digital mediums campaigns can:

- Meet voters where they are on key channels
- Deliver on-brand and authentic content
- Reinforce voter contact and fill audience gaps
- Apply insights from the whole campaign (e.g., field, polling) to your digital program
- Capitalize on key moments in the news or developments in the political landscape

Social Media

- Platforms: Facebook, Twitter, Instagram, Etc.
- Content Types: Memes, Dunks, Slices of Life Trends
- Benefits: Engaging, Authentic, Relevant
- Goals: Build Audiences, Spread Messages, Strengthen your base

SMS

- Content Type/ Purpose: Personal Alerts, Relevant Information
- Goals: Activate Audiences, Fundraising, Mobilization

Email

- Content Style: Longform communication, Urgency Relevant information
- Content Types: Fundraising, Volunteer Recruitment and Engagement, Newsletters, Advocacy Actions
- Goals: Fundraising, Activate Audiences, Strengthen your base
- Key Considerations (Before starting your program) :
 - Do I have a CRM?
 - Do I have a list already?
 - Do I have the budget to grow a list?
 - What is the current ROI?
 - What is the projected return window?
 - Does my email vendor provide regular reporting?
- Best Practices
 - Deliverability: talk to your email consultant about deliverability (improving delivery → higher open rates --> higher \$\$\$).
 - Respect: Treat your list with respect. Spammy emails can backfire, especially in local races.
 - Relevance: Would you read your campaign emails? If a deadline matters, communicate the “why”.
 - Relationships: Are you engaging people over time and building ties? Or is it just a “churn and burn” approach?

Ads (Paid Media)

- **(Major) Types of Digital Ads**
 - :60 audio
 - :30 second video (skippable/non skip)
 - :15 second video (skippable/non skip)
 - :6 non slip
 - Static ads (display)
 - Sponsored content (e.g., influencers)
 - DOOH (digital out of home)
 - **Walled Gardens:** Facebook/ Instagram, YouTube, Snap, Twitter/X
 - **Open web/programmatic:** CTV/OTT, online video (sound-on, non skip pre-roll is typically the highest value) audio, display, DOOH
 - **Search:** Google Search

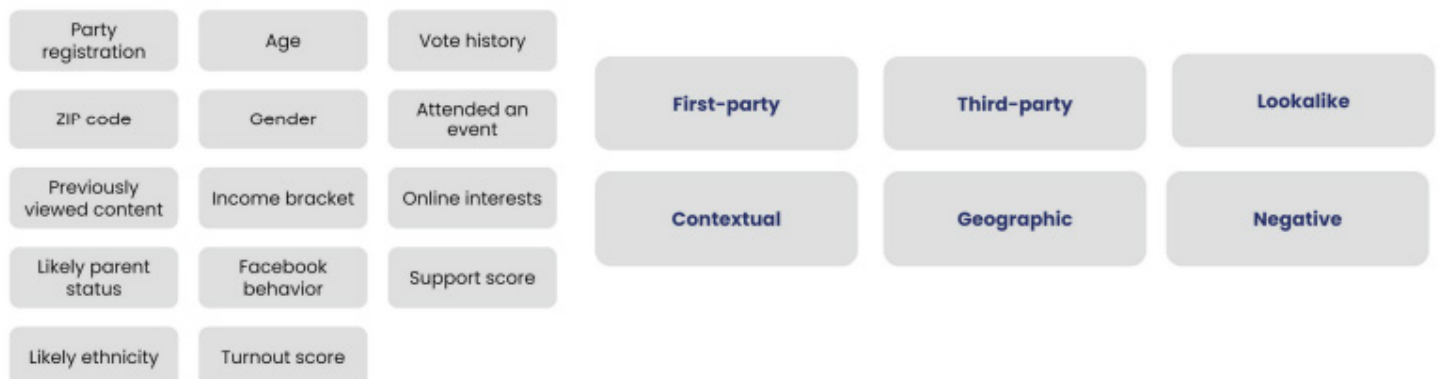
Key Considerations

- **What are my goals?**
 - Every effective media plan starts with one question: what is my objective? Media plans will vary depending on whether you aim to persuade or activate people.
 - How you prioritize your goals (e.g., turnout with X group, boosting a candidate's favorables, etc.) can inform targeting, budgeting, and creativity.
- **Who are my audiences?**
 - The media plans you receive from your consultant should align with the audiences you need to persuade and mobilize.
 - Important questions to ask yourself:
 - TV + digital: Does my digital media plan sync up with the TV plan (e.g., if it's too expensive to buy GRPs in a media market that covers part of my district, are the digital ads covering the gaps)?
 - Mail + digital: Mail and digital often sync up well in list-targeted channels like Meta and programmatic ads. Digital ads can be used to layer mail ads if you run ads to the same audiences to drive greater frequency with targets across channels.
 - Field + digital: Digital ads can be used for "turf priming" and "turf building" by targeting field regions before and after canvasses
 - Mail + Field : Make sure that both programs are working from the same foundational universes and counts.

- **What is my budget?**
 - A digital media budget should reflect your audiences. A large spend on CTV may make less sense in a rural district. Some districts are more efficient for broadcast; other districts are less efficient. Check the DMAs, GRPs, and competitive
 - Media planners typically use a “waterfall” approach of funding the highest priority channels first. If your budget is \$30K over three months, spending on six different types of digital ads will make it less likely that your message breaks through anywhere because each channel (e.g., FB, YouTube, CTV) is competing for small slices of the pie.
- **What is my creative?**
 - Is your creative connected to your messages? Does it serve goals like raising name ID, advancing a negative narrative, or boosting your candidate’s favorability? Does it represent your targets? Does it fit the channels?
 - If you only have 1 TV ad, does your digital creative fill in gaps or amplify your TV message? Similarly, with mail, are you reinforcing different tracks in your digital creative to create a “surround sound” effect?
- **What is my timeline?**
 - If you’re running ads shortly before an election, you’ll want a balance of persuasion (primarily premium video) and mobilization/activation ads (paid social and, depending on the level of keyword traffic, search ads) to both broadcast your campaign message and direct people to take GOTV actions.
 - Campaigns with longer time horizons typically run on more channels to extend and amplify reach from the workhorse premium video channels

Digital Targeting

Digital targeting is the process of determining which universes of voters will receive your digital content. Your digital consultant will drive this process. Below are a few characteristics and behaviors of voters that help create universes.



Below is an example of digital targeting in action

These options are usually layered together

- Goal: Mobilization campaign for Democrats who usually vote in presidential elections but not midterms.
 - Start with a first party list from VAN.
 - Create a lookalike audience to our matched voters.
 - Add audience segments.
 - Saturate ZIP codes in some college towns .
 - Remove people who have already voted.

Key Terms

- OTT: over the top (ex: connected TV, tablet, smartphone).
- CTV: (connected TV like a Roku TV).
- CPM: Cost per thousand impressions
- Impression: an ad that was served.
- CPA: Cost per acquisition.
- Reach: people reached.
- Frequency: how often ads were shown.
- Match rate: per who were matched to digital IDs divided by total list.
- Thumb stop rate: person who watched >3 seconds divided by people who saw the ad.
- AVOC: audible and visible on completion.
- Brand lift: surveys to people who viewed the ads.

Choosing the proper digital medium

Choosing the correct medium can be challenging. Here are a few key questions to ask:

- Email: What's my list size? How is my current fundraising? How much time do I have?
- Social: Do I have staff/volunteer resources for content creation and engagement? Where are my audiences?
- SMS: What universes am I trying to reach? Is this included in an organizing program?
- Paid media: What's my overall budget? Who are my targets?

Maximizing the Effectiveness of Your Digital Program

Before you (or your digital consultant) send that text, email, develop/approve that ad, remember that what really matters is the reach/frequency, the creative, and investment. Effective digital should align with your campaign objectives. Ask yourself:

- Is this email/text/ad/post helping me raise \$\$\$?
- Is this email/test/post/ad recruiting or retaining volunteers?
- Is this email/text/post/ad raising my candidate's name ID and/or favorability in the district?
- Is this email/text/post/ad strengthening my base?
 - Is this email/text/post/ad advancing a poll-driven narrative about my candidate and/or their opponent?
 - Is this email/test/post/ad reinforcing other forms of voter contact (calls, door knocks, mail etc.)?

Cultural Competent Creative and Targeting

Cultural competence should be foundational to your campaign. When you are running ads in a different language be sure to invest in proper translation services and ensure that the political terms are translating correctly.

Targeting should take into consideration factors like geography (e.g., are you targeting to over-index zips?), language (platforms like Meta and Google allow for targeting by language), and content consumption. Equis has done in-depth research on Hispanic targeting and produced resources like this.

It's common to see higher CPMs for targeting multicultural audiences – this is a premium that's often worth paying for meeting voters where they are online.

Working with Your Digital and Media Consultants

Digital consultants specialize in making the most of platforms and ad reach. They may also work closely with your media consultant to ensure stylistic and message consistency in the content.

Reporting

Below are the metrics that you should use, as well as the questions you should answer to evaluate the effectiveness of your program. Your digital consultant will provide reports for your review.

There are two main types of metrics: vanity metrics and impact metrics. Impact metrics measure what ultimately matters, like votes and dollars raised. CPA, ROAS, commit-to-vote signups, and brand lift results are examples of impact metrics.

Vanity metrics can offer directional value but won't tell you directly if your campaign is working. A report that only tells you the number of impressions delivered is missing key facts like how many targets were reached, how many times did the average target see my ads, and whether my ads cause an effect.

If you can't afford a Brand Lift study, you can ask your vendor to use free secondary impact metrics like Thumb Stop ratio in Meta (the % of >3 second views divided by total impressions) and View rate in Google Ads, and the free ad recall lift metric in Meta ads.

Persuasion: Reach, Frequency, BrandLift, AVOC (audible and visible on completion)

- Reach and Frequency are essential to persuasion campaigns. For your message to break through, you need to reach the right targets with sufficient repetition.
- There are two ways to measure ad effectiveness: pre-flight (tests before an ad campaign runs through companies like Swayable and Grow Progress) and mid-flight (brand lift tests done while an ad is running that are free value in Meta and Google, and typically a small charge when run through programmatic CTV campaigns)

Mobilization: CTR, Conversion Rate. Engagement like Shares.

- If you're running GOTV ads to a website like "iwillvote.com" or an official state election site, you can't track conversions directly so CTR (specifically link click through rate) is the best metric.
- If you are driving traffic to your own website, you can install a tracking pixel and measure conversions if there's an on-site activity like a signup form.

Fundraising: CPA, Return on Ad Spend, CTR, acquisition cost

- Digital fundraising typically provides the most detailed reporting. Immediate return on ad spend (example: direct donate ads) and longer term return windows are crucial for evaluating program effectiveness.

Persuasion/Mobilization questions to ask consultants:

- What was the weekly reach and frequency on each channel (YouTube, Facebook/Instagram, Google Search, programmatic etc)?
- What are our audience match rates?
- Have you talked to your pollster and/or direct mail consultant about audiences?
- Which ads are performing best? (Completion rate., AVOC, brand lift, if available, shares etc)
- Where are my ads running (channels, genres, and shows if available)? If programmatic ads, can you provide a placements report?
- How is the landing page performing (traffic, conversions)?
- CTV questions: Are you using an allow list? Are you using a block list? Are my ads running on screensaver apps and other lower-quality inventory?
- Contingent on budget: can you place reservations on YouTube and CTV to lock in lower rates?
- Contingent on budget and timing: can you run a brand lift test?
- Are we taking advantage of key moments in the news cycle to amplify key messages from our campaign and draw a contrast with our opponent?

Buying 101

The process of purchasing ad space for your campaign can be complicated. However, you should rely on seasoned media consultants and vendors who will do the buying on behalf of your campaign. Spending for ad space via platforms should be driven by your overall paid media strategy.

Pricing for ad space will depend on a number of factors, including:

- **Length of ad:** longer ads cost more .
- **Time of year that ad is placed:** Ad space tends to cost more the closer you are to Election day .

Below are some definitions of commonly used words and phrases in media buying:

- **DMA** - Designated Media Market - The Nielsen designated geographic area that is covered by market-specific Television stations
- **GRPs** - Gross Rating Points - The sum of all ratings. The total ratings of all programs purchased during a given period of time.
- **CPP** - Cost Per Point - Cost of reaching one percentage of individuals exposed to a spot. (Rating = 1% of Audience)
- **Flight Date** - The start and end date of your advertising schedule.
- **Frequency** - The potential number of times individuals are exposed to an advertising schedule over a given period of time.
- **Competitive** – The competitive is basic tracking of our opponent and allies media spending. Your media consultant will provide the competitive in real time. The competitive helps inform strategy. For example, you might use the information to adjust your media plan. You might add money to a market where a competitor is active, or you might include Spanish language radio or television to your plan.
 - The FCC Requires stations to report political spending in the station's Public File.
 - Digital does not have that level of regulation. Some platforms, such as Google and Facebook, have reporting tools, but others vary widely.

Streaming

While streaming is a quickly growing share of media consumption, it should still be bought to complement traditional linear advertising to maximize amplification and results. Below are definitions of some commonly used words and phrases when buying streaming.

- **Connected TV (CTV)**– Using a device to connect TV Screens to the internet without cable.
 - Examples: Smart TV, Fire Stick, Gaming Console, Apple TV, Roku (CTV device and streaming platform)
 - CTV is viewed on a TV screen. Content viewed on phones, tablets, or computers is not CTV
- **Over the Top (OTT)** – TV content is accessed “over” cable box using internet connection
 - OTT is viewed on a TV screen. Content viewed on phones, tablets, or computers is not OTT.
- **Full Episode Player (FEP)** – content that can appear on any device but typically TV length, professionally produced, commercial breaks.
- **Video on Demand (VOD)** – content available to stream or download after airing live.
 - **AVOD** – ad-supported video on demand
 - **SVOD** – subscription-supported video on demand

(Direct) Mail 101

Direct mail is a paid communication medium that campaigns use to share specific messages to educate, persuade and mobilize voters. It is also a great tactical medium that is often used to register people to vote, help them request an absentee or mail-in ballot, or commit-to-vote.

Why Direct Mail?

- **Targeted**- One of the great advantages of direct mail is that you can target your communications on a person-level basis. You will work with a direct mail firm to create universes of targeted voters that should receive your mail pieces based on the specific message.
- **Efficient**- A direct mail piece communicates a succinct specific message to voters with carefully selected words and images where voters can read and understand the message in mere seconds or minutes.
- **Can force it into people's homes**- Because most direct mail lands in people's mailboxes- there is no "opt-in" once they are in your universe.

When is Direct Mail Most Useful?

- When there is a message that you need to target (choice, criminal justice reform, guns, etc.)
- Geographic/demographic targets
- Media market considerations (i.e. a very costly market, a very inefficient market, spill markets)
- Budget limitations
- Layering different media

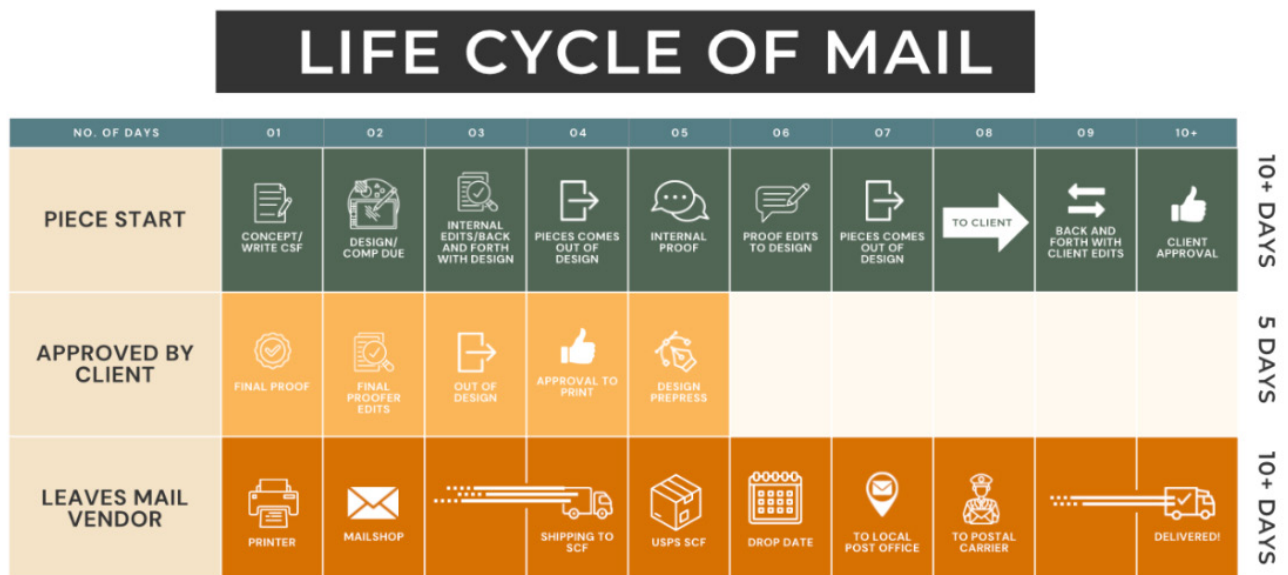
Defining A Direct Mail Universe

A direct mail universe is a list of voters (generally households) who receive your direct mail pieces. The universe is determined by your mail consultant in partnership with you and your data team. In most cases, your campaign will have multiple universes based on demographics, voter propensity, and ideology.

Key Considerations when using Direct Mail

- Message that you need to target to a specific audience about a specific issue (choice, criminal justice reform, guns, etc.)
- Media market considerations
- Budget limitations
- Layering different media

Mail Approval Process



Managing the approvals process for your mail program is key. You should build in a buffer of at least 2-3 days for approvals during phase 1 and 2 when mail pieces are being edited based on your campaign's feedback.

You will also need to factor in approvals/ review from the state party and house caucus.

Direct Mail on State Legislative Races

- Often the main paid communication medium
- Generally, anywhere from 4-20 pieces depending on campaign budget (though potentially to different universes)
- Pieces generally spaced 3-5 days apart (USPS guidelines on drops)
- Potentially dual-drops for Vote-by-Mail and Election Day universes

Expectations of Mail Consultants

- Professional level creative and targeting
- Extensive experience in your county/legislative district
- Lessons learned from experience OUTSIDE your county/legislative district
- Capacity to engage fully in your direct mail planning execution
- Help with other aspects of the campaign (debate prep, stump practice, reviewing press releases, etc., with no retainer fees)

Evaluating your Mail plan

- Does it match the overall strategy?
- Does targeting make sense?
- Are we talking to enough voters to win?
- Do the costs match what we agreed to?
- Do the drop dates make sense?
- Are we getting the right amount of repetition with each voter?

Types of Mail

On a typical state legislative campaign, there are typically two main types of direct mail.

There are two main types of direct mail: **Persuasion and Turnout.**

Persuasion Mail includes the following categories:

- Positive
- Negative
- Comparative

And includes the following types:

Biography: This type of mail piece promotes your candidate's biography and establishes the central message of your campaign/ why your candidate is running.

LORENA AUSTIN

"Our City's Values Are in My DNA"

"Llevo los valores de la ciudad en el ADN."

Meet the generations of Lorena's family who have inspired her. Conoce a miembros de diversas generaciones de la familia de Lorena quienes la inspiraron.

My family is my inspiration, and this our Arizona story.

My family has been serving Arizona communities since the 19th century. My great-grandfather, Fredrick Levi Austin, was a Pinal County Deputy Sheriff.

Mi familia es de servicio de las comunidades de Arizona desde el siglo XIX. Mi bisabuelo, Fredrick Levi Austin, fue sheriff adjunto del condado de Pinal.

My maternal great-grandfather, Bartolo Navarro, worked in the fields as a farmworker well into his senior years.

Mi bisabuelo materno, Bartolo Navarro, trabajó en los campos como agricultor hasta tarde en su vejez.

My grandfather, Albert "Beto" Austin, and my grandmother, Margarita "Maggie" Rodriguez, operated a grocery store that served everyone—regardless of race—in then-segregated Mesa.

Mi abuelo Albert "Beto" Austin y mi abuela, Margarita "Maggie" Rodriguez, operaban una tienda de comestibles que atendía a todos, independientemente de su raza, en Mesa cuando estaba segregada.

My parents are Latino civil rights leaders who grew up in a segregated Southwest and stood up for our community. They taught me to work hard, make a difference and fight for your community.

Mis padres, que crecieron en tiempos en que la región suroeste estaba segregada, son líderes de los derechos civiles de los latinos y defendieron a nuestra comunidad. Me enseñaron a trabajar duro, dejar huella y luchar por mi comunidad.

Courtesy of Berlin Rosen

Learn more at LindseyForPA.com.

"My dad's 40 years as a union operating engineer taught me the value of fighting for what's right, even if it's hard." *Lindsey*

Fighting for Affordable Health Care
Lindsey Williams believes all Pennsylvanians deserve access to affordable health care. She will fight to protect coverage for pre-existing conditions and to lower skyrocketing prescription drug costs.

Fully Funding Our Public Schools
A public education champion, Lindsey Williams will fight to protect funding for our public schools. She will make sure money doesn't get siphoned away from our kids' education.

Leveling the Playing Field for Workers
Lindsey Williams will work to create an economy that works for everyone, not just big corporations. She will fight to raise the minimum wage and secure paid sick leave for workers.

Standing Up for Women
Standing up for a woman's right to choose is a top priority for Lindsey Williams. She believes personal health care decisions should stay among a woman, her family and her doctor—not the government.

Meet Jack.

He knows we need affordable health care. A level playing field for workers. And to protect funding for our schools. He's my inspiration.

He's also my dad.

LINDSEY WILLIAMS *f.e.p.* STATE SENATE

Courtesy of Berlin Rosen

VOTE DEMOCRAT LINDSEY WILLIAMS *for* STATE SENATE

Comparative: This type of mail piece contrasts candidate's position on a specific issue with the opponent

Every day I worry about a shooting happening at my kid's school.

I am voting for Chris Deluzio because he is committed to passing **common sense gun legislation** to keep our communities safe."

Lisa

CHRIS DELUZIO:
A father and veteran who will keep our communities safe.
When Chris Deluzio served in Iraq, he carried the same type of assault weapons that mass shooters are using to kill American children every day.
He knows those weapons don't belong on our streets, let alone in our schools.

AS CONGRESSMAN, CHRIS WILL:

- ✓ Support common sense gun reforms, including a ban on assault weapons
- ✓ Work to keep guns out of our schools, churches, and public spaces
- ✓ Keep firearms out of the hands of people who pose a harm to themselves or others

JEREMY SHAFFER:
A dangerous extremist who puts our families at risk.
We cannot trust Jeremy Shaffer to keep our communities safe from gun violence.

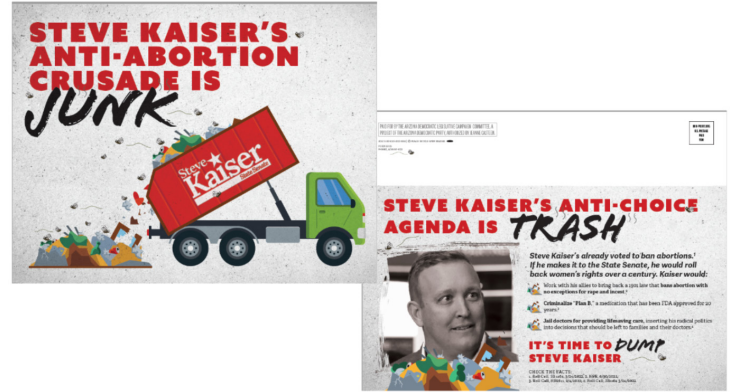
- ✗ Opposes common sense gun safety reforms that would keep our neighborhoods, churches, public events, and schools safe?
- ✗ Has a 99% rating and endorsement from the NRA?

CHECK THE FACTS:

© 2018 Deluzio.com, 407-447-6100, 1, 10th Street, #10000 01011, 010 PLY, Pennsylvania, Braden, 01000 01011

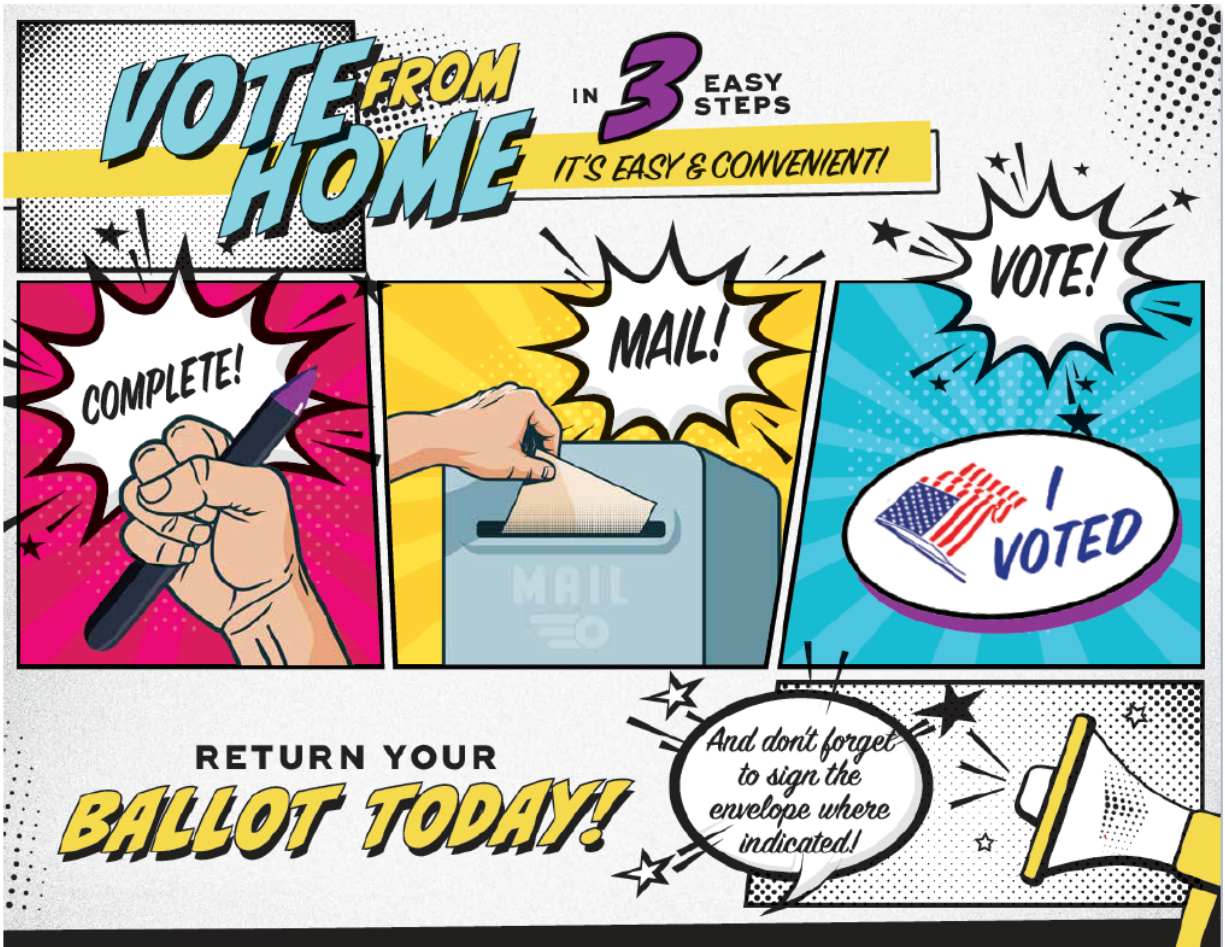
Courtesy of Deliver Strategies

Negative/Attack: This type of mail piece contrasts candidate's position on a specific issue with the opponent



Courtesy of Berlin Rosen

Vote-By-Mail: This type of mail piece gives voters information on how to Vote-by-mail.

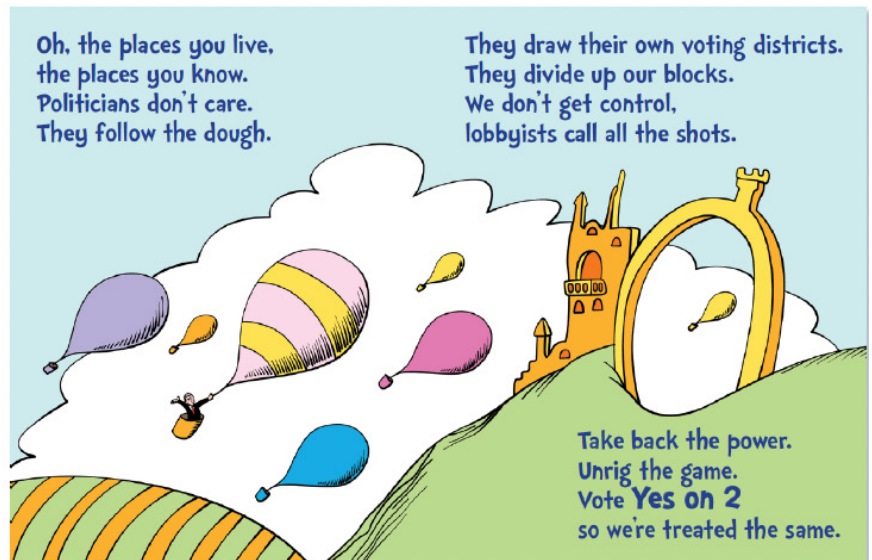
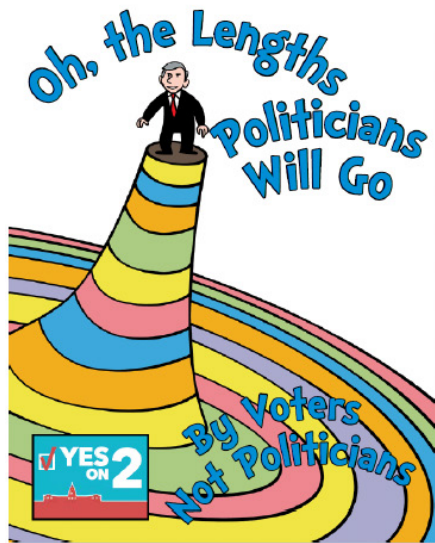


[Courtesy of Deliver Strategies](#)

Additional Types of Mail

While persuasion and turnout/GOTV mail are the two most typical types of mail on state legislative candidate campaigns, there are several other types of mail that you may interact with, either on a candidate campaign or in future work.

Issue-Specific Non-Candidate Mail: This type of mail piece highlights a specific issue that is central to your campaign's message and resonates with a key demographic of voters in the district.



[Courtesy of Deliver Strategies](#)

Multilingual: This type of mail piece is targeted at a segment of voters whose primary language may not be English. The piece may also be a chance to highlight the importance of a certain community to the campaign.

AAPI



[Courtesy of Deliver Strategies](#)

Latinx



[Courtesy of Berlin Rosen](#)

Mail Budgets

Your direct mail budget will likely be a significant portion of the campaign's overall budget. Your mail consultants will put together various plans at various price points for your review and approval. Below are 2 examples of mail budgets:

Budget 1

| Piece | Format | Name | Universe | Campaign Approval | Party Approval | Drop Date | Est. Quantity | Est. Production | Est. Shipping | Est. Postage | VA Sales Tax | TOTAL |
|-------|--------------------------|-------------------|-------------------------------------|-------------------|----------------|-----------|---------------|-----------------|---------------|--------------|--------------|-----------|
| M01 | 11 x 17 Brochure w/Reply | Intro Survey | Core Persuasion + R Women + New Reg | 8/7 | 8/13 | 8/20 | 19,929 \$ | 11,558.82 \$ | 350.00 \$ | 4,185.09 \$ | 693.53 \$ | 16,787.44 |
| M02 | 8.5 x 11 Postcard | Health and Safety | Core Persuasion | 8/10 | 8/16 | 8/23 | 13,242 \$ | 6,091.32 \$ | 350.00 \$ | 2,780.82 \$ | 365.48 \$ | 9,587.62 |
| M03 | 6 x 11 Postcard | Coal Lobby 1 | Core Persuasion | 8/6 | 8/18 | 8/25 | 13,111 \$ | 5,637.73 \$ | 350.00 \$ | 1,704.43 \$ | 338.26 \$ | 8,030.42 |
| M04 | 6 x 11 Postcard | Coal Lobby 2 | Core Persuasion | 8/11 | 8/20 | 8/27 | 13,111 \$ | 5,637.73 \$ | 350.00 \$ | 1,704.43 \$ | 338.26 \$ | 8,030.42 |
| M05 | 6 x 11 Postcard | Coal Lobby 3 | Core Persuasion | 8/19 | 8/23 | 8/30 | 13,111 \$ | 5,637.73 \$ | 350.00 \$ | 1,704.43 \$ | 338.26 \$ | 8,030.42 |
| M06 | 6 x 11 Postcard | Coal Lobby 4 | Core Persuasion | 8/19 | 8/25 | 9/1 | 13,111 \$ | 5,637.73 \$ | 350.00 \$ | 1,704.43 \$ | 338.26 \$ | 8,030.42 |
| M07 | 8.5 x 14 Postcard | Insulin Cap | Core Persuasion + R Women + New Reg | 8/25 | 8/31 | 9/7 | 19,929 \$ | 7,373.73 \$ | 350.00 \$ | 4,185.09 \$ | 442.42 \$ | 12,351.24 |
| M08 | 8.5 x 11 Postcard | Insulin PSA | Core Persuasion + R Women + New Reg | 8/27 | 9/2 | 9/9 | 18,535 \$ | 6,672.60 \$ | 350.00 \$ | 3,892.35 \$ | 400.36 \$ | 11,315.31 |
| M09 | 8.5 x 11 Letter | GOTV Letter | Base Turnout: Early | 9/6 | 9/7 | 9/13 | 13,623 \$ | 4,086.90 \$ | 325.00 \$ | 1,770.99 \$ | 245.21 \$ | 6,428.10 |
| M10 | 8.5 x 11 Postcard | He Wouldn't | Core Persuasion + New Reg | 8/28 | 9/9 | 9/16 | 15,242 \$ | 6,706.48 \$ | 350.00 \$ | 3,200.82 \$ | 402.39 \$ | 10,659.69 |
| M11 | 6 x 11 Postcard | GOTV Go Back | Base Turnout: Early | 9/6 | 9/10 | 9/17 | 13,623 \$ | 5,857.89 \$ | 325.00 \$ | 1,770.99 \$ | 351.47 \$ | 8,305.35 |
| M12 | 8.5 x 11 Postcard | Just One | Core Persuasion + New Reg | 9/2 | 9/14 | 9/21 | 15,242 \$ | 6,706.48 \$ | 350.00 \$ | 3,200.82 \$ | 402.39 \$ | 10,659.69 |
| M13 | 8.5 x 11 Postcard | Every Step | Core Persuasion + R Women | 9/15 | 9/21 | 9/28 | 18,535 \$ | 7,414.00 \$ | 350.00 \$ | 3,765.09 \$ | 444.84 \$ | 11,973.93 |
| M14 | 8.5 x 11 Postcard | Worked Hard | Core Persuasion + R Women | 9/18 | 9/24 | 10/1 | 18,535 \$ | 7,599.35 \$ | 350.00 \$ | 3,765.09 \$ | 455.96 \$ | 12,170.40 |
| M15 | 8.5 x 13 Postcard | Trust | Expanded Persuasion | 9/28 | 9/29 | 10/5 | 14,378 \$ | 6,470.10 \$ | 350.00 \$ | 2,731.82 \$ | 388.21 \$ | 9,940.13 |
| M16 | 8.5 x 11 Postcard | Proud | Women 50+ | 9/28 | 9/29 | 10/6 | 10,163 \$ | 5,183.13 \$ | 300.00 \$ | 2,032.60 \$ | 310.99 \$ | 7,826.72 |
| M17 | 8.5 x 22 Brochure | Voter Guide | Expanded Persuasion | 9/28 | 10/1 | 10/8 | 14,378 \$ | 6,901.44 \$ | 350.00 \$ | 2,731.82 \$ | 414.09 \$ | 10,397.35 |
| M18 | 6 x 11 Postcard | Everything | Expanded Persuasion | 9/30 | 10/5 | 10/12 | 14,378 \$ | 6,038.76 \$ | 350.00 \$ | 1,869.14 \$ | 362.33 \$ | 8,620.23 |

| | | | | | | | | | | | | |
|--------------|--------------------|----------------|---------------------|-------|-------|-------|-----------|-------------|-----------|-------------|-----------|-------------------|
| M19 | 6 x 11 Postcard | Heads | Base Turnout | 9/29 | 10/6 | 10/13 | 15,127 \$ | 6,202.07 \$ | 350.00 \$ | 1,764.10 \$ | 372.12 \$ | 8,688.29 |
| M20 | 8.5 x 11 Postcard | Dollar | Women 50+ | 10/3 | 10/6 | 10/13 | 10,163 \$ | 5,183.13 \$ | 300.00 \$ | 2,032.60 \$ | 310.99 \$ | 7,826.72 |
| M21 | 8.5 x 11 Postcard | Hero | Expanded Persuasion | 10/3 | 10/8 | 10/15 | 14,378 \$ | 6,470.10 \$ | 350.00 \$ | 2,731.82 \$ | 388.21 \$ | 9,940.13 |
| M22 | 8.5 x 11 Postcard | Kids | Expanded Persuasion | 10/8 | 10/11 | 10/18 | 14,378 \$ | 6,470.10 \$ | 350.00 \$ | 2,731.82 \$ | 388.21 \$ | 9,940.13 |
| M23 | 8.5 x 11 Postcard | Costs | Women 50+ | 10/6 | 10/12 | 10/19 | 10,163 \$ | 5,183.13 \$ | 300.00 \$ | 2,032.60 \$ | 310.99 \$ | 7,826.72 |
| M24 | 8.5 x 11 Postcard | GOTV 1 | Base Turnout: Late | 10/9 | 10/12 | 10/19 | 15,385 \$ | 6,769.40 \$ | 350.00 \$ | 2,923.15 \$ | 406.16 \$ | 10,448.71 |
| M25 | 8.5 x 11 Postcard | No Masks | Expanded Persuasion | 10/1 | 10/13 | 10/20 | 14,378 \$ | 6,470.10 \$ | 350.00 \$ | 2,731.82 \$ | 388.21 \$ | 9,940.13 |
| M26 | 6 x 11 Postcard | GOTV 2 | Base Turnout: Late | 10/11 | 10/15 | 10/22 | 15,385 \$ | 6,307.85 \$ | 350.00 \$ | 2,000.05 \$ | 378.47 \$ | 9,036.37 |
| M27 | Letter in Envelope | Closing Letter | Expanded Persuasion | 10/12 | 10/18 | 10/25 | 14,378 \$ | 4,313.40 \$ | 350.00 \$ | 1,869.14 \$ | 258.80 \$ | 6,791.34 |
| M28 | 8.5 x 11 Postcard | GOTV Flags | Base Turnout: Late | 10/19 | 10/20 | 10/25 | 15,753 \$ | 6,931.32 \$ | 350.00 \$ | 2,993.07 \$ | 415.88 \$ | 10,690.27 |
| M29 | 6 x 11 Postcard | GOTV Power | Base Turnout: Late | 10/19 | 10/20 | 10/27 | 15,753 \$ | 6,458.73 \$ | 350.00 \$ | 2,047.89 \$ | 387.52 \$ | 9,244.14 |
| M30 | 6 x 11 Postcard | Dominion | Closing Persuasion | 10/19 | 10/20 | 10/27 | 13,413 \$ | 5,767.59 \$ | - | 5,955.37 \$ | 346.06 \$ | 12,069.02 |
| TOTAL | | | | | | | | | | | | 291,586.86 |

Budget 2

| Piece # | Format | Universe | Approval Date | Drop Date | Total Quantity | Est. Production | Est. Shipping | Est. Postage | Sales Tax | TOTAL |
|--------------|-----------------------------------|------------------|---------------|-----------|----------------|-----------------|---------------|--------------|-----------|----------------------|
| 1 | 8.5 x 11 Letter in Envelope | Broad Persuasion | 3/14 | 3/20 | 15,126 | \$ 9,101.40 | \$ 250.00 | \$ 4,502.71 | \$ 546.08 | \$ 14,400.20 |
| 2 | 11 x 17 Two-Fold Brochure w/Reply | Broad Persuasion | 3/14 | 3/22 | 15,126 | \$ 10,588.20 | \$ 300.00 | \$ 5,128.06 | \$ 635.29 | \$ 16,651.55 |
| 3 | 7 x 13 Postcard | Broad Persuasion | 3/20 | 3/28 | 15,126 | \$ 8,168.04 | \$ 300.00 | \$ 5,128.06 | \$ 490.08 | \$ 14,086.18 |
| 4 | 8.5 x 11 Postcard | Broad Persuasion | 3/27 | 4/3 | 15,126 | \$ 8,168.04 | \$ 300.00 | \$ 5,128.06 | \$ 490.08 | \$ 14,086.18 |
| 5 | 8.5 x 11 Postcard | June Persuasion | 5/22 | 5/30 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| 6 | 7 x 13 Postcard | June Persuasion | 5/24 | 6/1 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| 7 | 8.5 x 11 Postcard | June Persuasion | 5/28 | 6/5 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| 8 | 7 x 13 Postcard | June Persuasion | 5/30 | 6/7 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| 9 | 8.5 x 11 Postcard | June Persuasion | 6/1 | 6/9 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| 10 | 7 x 13 Postcard | June Persuasion | 6/5 | 6/13 | 17,634 | \$ 8,817.00 | \$ 300.00 | \$ 6,207.17 | \$ 529.02 | \$ 15,853.19 |
| TOTAL | | | | | | | | | | \$ 154,343.24 |

Mail Shoot

A mail shoot is a photo shoot focused on capturing images of your candidate and the district that align with the messaging and themes of the direct mail plan.

Campaign managers are in charge of organizing and leading the shoot in partnership with your mail consultants and with the support of your staff. This may include but is not limited to:

- Finding locations to shoot (libraries, schools, parks, etc)
- Finding extras for the shoot (community members, supporters, candidate's family)
- Vetting extras for the shoot (use your research team to ensure you have vetted EVERYONE participating in the shoot)
- Candidate prep (reviewing the schedule, selecting wardrobe)
- Managing day of logistics (shoot schedule, candidate management, food for shoot team)

Below is a sample shoot schedule. Shoot days can last between 8-12 hours. A full shoot schedule template can be found in the BLC Google Drive.

Campaign Name Date of Shoot

| Crew | Name | Email |
|-------------------------|-----------|---------------|
| EP/ Director | Sam Smith | Sam@media.com |
| Producer | Sam Smith | Sam@media.com |
| Producer | Sam Smith | Sam@media.com |
| Director of Photography | Sam Smith | Sam@media.com |
| Cam 2 | Sam Smith | Sam@media.com |

*** Additional roles as needed ***

| CAMPAIGN | NAME | EMAIL |
|--------------------|------------|---------------|
| Candidate | Lisa Ortiz | Sam@media.com |
| Campaign Manager | Lisa Ortiz | Sam@media.com |
| Political Director | Lisa Ortiz | Sam@media.com |

*** Additional roles as needed ***

HEALTH AND SAFETY EXPECTATIONS AND PROCEDURES

- PLEASE REVIEW CDC RECOMMENDATIONS & GUIDELINES.
- All local, state and federal guidelines will be followed.
- DO NOT COME TO SET IF YOU FEEL SICK.

SOCIAL MEDIA

- Please keep in mind that any person involved in the shoot is explicitly forbidden from posting photos or videos from the production on social media without expressed permission and consent from the XX Campaign

Day, Month Date, Year Schedule

- Location1: Address
- Parking: XX
- Location 2: Address
- Parking: XX

| TIME | ACTION | NOTES |
|----------|---------------------------|---------------|
| 5:00 AM | Crew Call Time | |
| 6:00 AM | Hair and Makeup Call Time | |
| 7:00 AM | Talent Call Time | |
| 12:00 PM | Location 1: Group Shot | Rolling Lunch |
| 6:30 PM | Wrap Location/ Day | |

Panel: Working with Media Consultants

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Showing up Authentically in Politics

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Resilience and Self-Care

(Courtesy of Hey Bear Coaching)

Self-care is about being as healthy as you can be and having a generally good state of overall well-being.

| It Is not: | It is: |
|--|--|
| Getting lost in just doing more tasks without intention (self-care virtue signaling) | Deeply personal and shifts depending on your circumstances and needs |
| Judging your body for its size or needs | Reasonably prioritizing important contributions to your well-being |

Reality/Reminder

Budgets are due, meetings must be run, volunteers must be managed, systems must be put in place, data must be entered, copies must be made.

Practical implications:

- We have to take care of ourselves and be as healthy as possible so we can lead and help.
- And we have to be clear about what we can and cannot do so that others can pick up batons and run with them as needed.
- We also need to be clear about what we want to achieve & who we want to be in the world.
- And what we want to model for others.

Campaign Plan: Identify Achievable Options + Implement

- Your resiliency is tied directly to addressing your basic needs.
- Recommendation: develop a systematic (“you fall to the level of your systems”) plan to address different components of your basic needs and, if possible, your complete human self.
- Satisficing = decision-making strategy or cognitive heuristic that entails searching through the available alternatives until an acceptability threshold is met

Move Naturally: Options

FYI: 150 minutes of moderate aerobic activity or 75 minutes of vigorous aerobic activity is the standard for adults. Based on your physical makeup and your amount of stress, you may need more.

- Schedule walking meetings.
- Move in place while you're on conference calls, even if it's just standing up.
- Canvass (obv).
- Have free weights next to or under your desk.
- Make a plan on how to fit in exercise/caretaking of your physical body.

Ideas here:

- Find a local gym that includes a sauna or jacuzzi. Schedule yourself to go every day but give yourself permission to just sit in the sauna/jacuzzi or to work out.
- Find a local exercise class that you can commit to 3x a week.

Make and keep appointments for annual physical exams, needed bloodwork, the dentist, and whatever else your being requires. Obviously, not during GOTV, but figure out when this is possible and do it.

Food and Drink: Options

FYI: An emphasis on anti-inflammatory foods is best when you're under a lot of stress. The Mediterranean diet is very good for this, and the Cleveland Clinic's write-up has clear portions and related ideas available.

- Drink water. Lots and lots of water.
- If you drink more than one cup a day: consider alternating coffee with green tea.
- Have bowls of nuts on your desk.
- Add a side of vegetables to your takeout order.
- Buy a tray of appetizer vegetables each week and put it out regularly on your desk.
- Find a local smoothie or juice place and order the one with the most vegetables in it.
- Eat until you're 80% full.
- Big Night Out? Get a glass of red wine.

Purpose & Stress Relief: Options

- Have a write-up on why you're doing what you're doing near you at all times (on your phone notes, printed out and taped to a monitor, etc) and/or something near your bed that you read each morning or night from a leader you admire. (This is priming and it's very powerful.)
- Similarly, have pictures of people you love and who love you nearby at all times. (Note: avoid pics of people you have complicated relationships with.)
- Meditate. Start with just one minute, with a timer, see if you can work your way up to 3 or 5.
- Express gratitude. Write down things or write-thank you notes. (Lyubomirsky)
- If applicable, find a local spiritual home. You may not be able to regularly make services, but having done the research and knowing that there is a nearby community is likely to be helpful.
- Dedicate time to things that make you "you" besides the campaign and work. It can just be 5 minutes every other day, but play the guitar or paint, read a book, etc.
- Schedule + take naps. Under your desk if needed.

Relationships: Options

- Set aside an hour to schedule recurring appointments for you to call important people in your life and to add birthdays/graduations/anniversaries in the upcoming months to your calendar.
 - You can also use this time to schedule floral bouquets to go out at appropriate moments.
- Tell people regularly, and specifically, about amazing traits you see in them. This is called strength spotting -- <http://bit.ly/strengthspot>.
- Do not underestimate the value of snail mail.
 - Get one blank set of cards + stamps. Set a timer for 3 min once a week, and write one card to one person in your life who is important to you. Mail that thing.
 - Use online shopping to your advantage. Send people fuzzy socks and a gift note saying you are thinking about them.

(Attribution: Hey Bear Coaching)

You Don't Have To Do Everything, Just Do Some Intentional Things

| Pre GOTV | GOTV | Post-GOTV |
|---|--|---|
| <ul style="list-style-type: none"> • Have a vegetable tray on desk • Have nuts on desk • Write purpose statement and read it before bed + upon wake up • Write and send one thank you note a week on Mondays • Stand for 1/2 of all conference calls • Make weekly 1:1 with Pete a walking meeting • Call Grandma every other week • Schedule bouquets for holidays | <ul style="list-style-type: none"> • Have a vegetable tray on desk • Have nuts on desk • Read purpose statement upon wake up • Stand for all conference calls (at start of GOTV, written before it kicks off) mail snail mail cards to brother, Grandma, and best friend • Strength-spot coworkers 2x day | <ul style="list-style-type: none"> • Make it to one religious service • Have a vegetable tray on desk • Have nuts on desk • Dental appointment • Massage • Write 5 thank you notes to people who meant a lot to me during the campaign period |

Signs of Burnout (in You or Your People)

- Chronic fatigue (lack of energy, feeling tired, eventually feeling drained, depleted)
- Insomnia
- Forgetfulness/impaired concentration and attention
- Physical symptoms – could include chest pain, heart palpitations, gastrointestinal pain, dizziness, fainting, shortness of breath, and/or headaches
- Increased illness
- Loss of appetite
- Anxiety
- Depression
- Anger
- Loss of enjoyment
- Pessimism
- Isolation
- Detachment
- Feelings of apathy and hopelessness
- Increased irritability
- Lack of productivity and poor performance

Promoting Resilience & Self Care as a Leader

- People will do what you model. (Avoid wearing a lack of self-care as a badge.)
- Priming Matters. The environment is key.
 - Pro tip: make sure there are plants around.
 - Build self-care and relaxation into the culture. (Stretch breaks, encouraging walks, breathwork.)
 - If you can afford it, have a water cooler.
 - Remind employees that sacrifice for the cause is great until their mind-body gives out. Structurally prioritize safety and well-being.

Getting on the Ground I

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Getting on the Ground II

Speakers & Bios

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Session Notes

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What are my key takeaways from this session?

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What am I still curious about?

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Other notes:

Glossary

Budget

Budget: A comprehensive plan in an Excel spreadsheet that details projected financial resources and expected expenditures.

Budget gap: The difference between the amount of money you are projected to raise and the amount of money you need to win according to your budget.

Burn rate: the rate at which a campaign spends money. This number

Cash flow: the total amount of money being transferred into and out of a business, especially as affecting liquidity.

Cash on hand (COH): the amount of accessible cash a campaign has after paying all its costs

Disbursements: A payment of funds.

Expenses: A charge for any service provided to the campaign.

In the red: to be in debt, running a deficit, or generally just not making money—being cash negative.

Overhead: Overheads are business costs that are related to the day-to-day running of the business. Unlike operating expenses, overheads cannot be traced to a specific cost unit or business activity. Instead, they support the overall revenue-generating activities of the business.

Reconcile or “zero out”: In budgeting, matching the amount projected to spend with the actual spent until all money in the campaign bank account is spent.

Spend down: The last few weeks of the campaign, where you are spending large amounts. Often, during the spend-down phase of the campaign, you will be wiring out as fast as you raise.

Spend to zero: A way to plan how to use each and every dollar you have

Warchest: funding obtained from donors well in advance of a campaign, usually accumulated by an incumbent for either re-election or to contest a more advanced office, or provided by a wealthy candidate to their own campaign.

Finance

Call sheet: A fact sheet used in telephone solicitation containing all relevant donor information: professional, economic, personal, contribution history plus the ask amount.

Call time: Designated, uninterrupted time for the candidate to spend on the telephone soliciting contributions.

Call time follow-up: Outreach to anyone contacted during call time who pledged to give to the campaign to ensure that they submit their contribution. This communication is usually in the form of a text or email and begin immediately after the call

Call time tracker: A calltime tracker is a document, normally in the form of a spreadsheet, where the following field are being tracked : Scheduled Hours of Calltime, Actual Hours of Calltime, # of Calls Made, # of Contacts, # of Pledges, Hard Pledges, Soft Pledges, Non- Specific Pledges, Non- Commits, Total Call Time \$, Contact %, Pledge Rate, Hourly Rate

Contribution limit: The amount a donor can legally contribute to the campaign.

Dialer: Software that automatically dials through a phone list, connecting only with live callers (skipping answering machines, busy signals, and disconnected numbers), used to accelerate passes through a phone universe. Rates for this service vary, and some training of volunteers is required before use. The average dialer will triple your contact rates.

Dials-per-hour: metric gives a view into how productive your call team is, and how many customers or leads are being contacted on average every business-operating hour.

Disclaimer: a statement that denies something, especially responsibility.

Finance plan: A written road map outlining how much to raise, from whom, why they should give, a fundraising message, fundraising methods and tools, a timeline for when the money will come in, and fundraising costs/expenses.

Giving history: An individual's contribution patterns, i.e. how much and how often s/he has given to candidates in the past.

Goal: a specific or targeted amount of money that the campaign is aiming to raise through various fundraising tactics (call time, events, mail, email

Pledge: A donors' commitments to give a certain amount of money to a campaign over a set amount of time.

Soft Pledge: A potential donor's agreement to contribute funds to a campaign that may not be a specific amount at the time of the ask. Campaigns typically need to follow up to ensure that the pledges are fulfilled.

Hard Pledge: A firm, specific commitment funds from a potential donor. Campaigns typically need to follow up to ensure that the pledges are fulfilled.

In-kind contribution: An expense incurred by the campaign but paid for by an outside individual or entity on behalf of the campaign. In-kind contributions must be reported; count against the individual's legal maximum limit; and cannot exceed the limit of the current election cycle (i.e. primary or general).

NGP: A web-based service for digital engagement, fundraising, and compliance reporting used by most federal Democratic campaigns. NGP is also used by state legislatures and local campaigns.

Pitch: A meeting with a potential donor to request a typically large contribution to the campaign

Pledge chase: The process, usually call, of following up on a donor pledge ~4-7 days after the pledge was made to ensure that money comes in the door. Staff should do pledge chase calls.

Pledge tracker: Keep track of promised incoming donations. See the total of your outstanding pledges with easy-to-use donation management tools.

Political Action Committee (PAC): A formal group of individuals with a common goal or interest who pool their resources to support and/or lobby candidates; PACs must register with the Federal Election Commission and/or the appropriate state entity and follow federal and/or local campaign finance laws.

Projection: Shows the expected revenues, expenses, and cash flows of a campaign over a forecast period.

Prospect: A group or individual identified as a logical target to become a donor to the campaign based on the Circles of Benefit.

Raise per hour: A calculation of how much a candidate is or should be raising per hour during call time

Re-solicit: To reapproach a donor for a 2nd or 3rd contribution. These are a foundational part of every fundraising and call time process. You should expect to "re-solicit" your donors two, three times before the campaign is over, and to do so every 2-3 months.

Rolodex(ing): The act or process of going over the candidate's network with them, identifying potential donors, volunteers, or folks who can be politically helpful.

Host: In fundraising, typically a wealthy individual who is responsible for supporting a campaign fundraising event by: inviting their networks (business owners, independently wealthy individuals, celebrities etc.), encouraging people to give and/or personally contributing funds to help the event meet its fundraising goal.

Host committee: In fundraising, a group of typically wealthy individuals who are responsible for supporting a campaign fundraising event by: inviting their networks (business owners, independently wealthy individuals, celebrities etc), encouraging people to give and/or personally contributing funds to help the event meet its fundraising goal.

Remit envelope : An envelope, traditionally used in fundraising mail to submit campaign donations.

Bundler: A person who organizes and collects campaign contributions from other donors

Campaign prospectus: A 1-2 page summary of the campaign, your candidates bio and any other key elements of the campaign that is used to engage primarily donors in supporting the campaign

Mail

Double tracking or Split dropping/split drops: When a campaign runs a single mail program that has two sets of drop days (day when the mail goes out) for the same piece of mail. Sometimes double tracking will happen in states with a long early vote window so that people who typically vote early will get certain mail pieces before likely Election Day voters.

Mail shoot: A photo shoot co-organized by your direct mail firm to create content and images that will be used in your campaign's direct mail program. This shoot will consist of your candidate as well as members of their family and community in locations that represent the key themes and messages of your campaign and your candidate's background/ biography.

Stills: Pictures or images used in the creation of a mail piece.

Tracks: programs of mail running to different groups - persuasion track, turnout track, constituency track.

Universes: A list of voters who the campaign has targeted for engagement. The campaign has a universe for direct voter contact (door, phone, text conversations, mail), and also for paid media (TV, digital ads). Could also be referred to as "counts".

Sign-off Date: This is the date that the mail piece needs to be fully approved by the campaign in order to hit the desired drop date. The sign-off date is typically 7 days before the drop.

Drop Date: This is the day that the mail "drops" into the mail stream. This does not mean that all the mail will hit doors this day. Instead, this is the day that the mail piece has fully been put in the hands of the USPS to distribute to the targeted list provided by the campaign. Depending on the size of the list and size of the universe, mail can be expected to arrive as early as the same day as the "drop date" or as late as two to three days later.

TV

Broadcast: transmit (a program or some information) by radio or television.

Cable: video delivery service provided by a cable operator to subscribers via a coaxial cable or fiber optics.

Competitive: Basic tracking of our opponent and allies media spending. Your media consultant will provide the competitive in real time. The competitive helps inform strategy. For example you might use the information to adjust your media plan. You might add money to a market where a competitor is active or you might include Spanish language radio or television to your plan.

Media Market: a region where the population can receive the same (or similar) television and radio station offerings, and may also include other types of media such as newspapers and internet content

Point: marketing messages that are sent to target voters

Streaming: Streaming is a way to watch or listen to content without having to download it.

Studio spot: A short piece of media content recorded by the candidate in a studio that is used in paid media

TV shoot: the process of creating a video for television broadcast.

Change traffic: A process where TV firms switch out one piece of creative content in the TV buys for another

Field

Canvass launch: The sending of volunteers to engage in direct voter contact

Coordinated campaign: A legal structure within state by which multiple, federal, statewide and local campaigns (presidential, US Senate gubernatorial, legislative, etc), in conjunction with the state party and occasionally with the direction and influence of the state party, combine resources (financial and personnel) and strategy to elect a slate of candidates.

GOTV: Get-Out-The-Vote (GOTV) refers to the critical final weekend, or weeks, before Election Day when all hands are on deck to contact voters and make sure they will actually vote.

Postcard party: An event that brings volunteers and supporters together to write letters to a targeted universe of voters, encouraging and persuading them to support your candidate and get out and vote .

Shift: Refers to the amount of time a volunteer should commit to volunteering when they sign up. During GOTV, these are typically three-four hours in length. Notably, this is different from the number of volunteers recruited, as volunteers can (and should!) complete multiple shifts. Because measuring shifts is how capacity is calculated, this term will be used frequently in a variety of ways.

Polling

Benchmark poll: Takes a snapshot/ measure of the current political environment, state of the race and forecasts opportunities for your campaign to grow in gaining support amongst voters you need to win by testing positives and negatives on you and your opponent.

Crosstabs: Data tables that present the results from a full group of survey respondents, as well as subgroups.

Focus group: Provides insight on how different strategies, messages or targeting plans will work by consulting actual groups of people. Campaigns with small budgets rarely do focus groups.

Internal poll: Polls not conducted by a third party but conducted by the candidate or campaign.

Poll draft: A document containing questions that will be used in a campaign's poll. This document is traditionally submitted to the campaign leadership team by the pollster and is reviewed and edited before being finalized ahead of the launch of the poll.

Poll split: The process of dividing the cost of a poll with the caucus or a partner. This could be a caucus, a committee, or a stakeholder like EMILYS List, 314 Action, etc.

Tracking Poll: Purposefully short and is designed to show a trend or level of support a candidate has over a period of time. It can also measure the impact of campaign communications. Campaigns can choose to do one or more tracking polls over the course of the race.

Political

Endorsement process: 1) Make a target list similar to fundraising call time 2) The pitch: ask yourself who you are with the endorsers background in mind why should they endorse you 3) The ask: similar to fundraising ask, make the ask, and then let them speak

Questionnaire: A set of printed or written questions with a choice of answers, devised for the purposes of a survey or statistical study.

Team call: A weekly or bi-weekly meeting of members of your campaign team, including staff (especially finance director), consultants, and your candidate to review progress, priorities, and strategy for the campaign. Sometimes referred to as a "consultant's call".

Scheduling/ Ops:

Compliance: Federal campaign finance law covers three broad subjects: Public disclosure of funds raised and spent to influence federal elections.

Compliance consultant: assists a wide range of clients, including Candidates, Political Action Committees, and Major Donors in complying with complex campaign reporting requirements under federal, state, and local laws.

Quarterly/ monthly filing:

Digital

OTT: over the top (ex: connected TV, tablet, smartphone)

CTV: (connected TV like a Roku TV)

CPM: Cost per thousand impressions.

Impression: an ad that was served.

CPA: Cost per acquisition.

Reach: people reached.

Frequency: how often ads were shown.

Match rate: per who were matched to digital IDs divided by total list

Thumb stop rate: person who watched >3 seconds divided by people who saw the ad.

AVOC: audible and visible on completion.

Brand lift: surveys to people who viewed the ads.

Acquisition: the procurement of emails and other pieces of contact information or data that comes from digital outreach. This term is often used in the phrase CPA (cost per acquisition), which refers to how much the campaign has/ had to spend on digital communications (ads etc.) in order to collect that piece of information

Digital fundraising: a term used to describe a variety of tactics, ranging from relatively basic online solicitation via email, text or other forms of virtual outreach.

Digital persuasion: How social media motivates action and drives support for causes.

Google Ads: Be seen where your customers are searching, browsing, and watching with Google Ads. Also referred to as “SEO” or “Search Ads”

Impressions: An ad view (though not necessarily a view that is active or lasts the entire length of a video or TV ad). When used in reference to a digital ad, an impression is counted when the web page is located and loaded.

Landing page: A standalone web page that potential customers can “land” on when they click through from an email, ad, or other digital location.

SMS: Better known as text messaging, SMS is a good term to add to your campaign dictionary. People are increasingly turning to mobile phones to communicate, so tapping into this social engagement is important for your campaign. SMSs have an increasingly high click-through rate and a higher rate of engagement that can be tapped into on a campaign.

Committees/ Partners/Key acronyms

AFL-CIO: The American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) works tirelessly to improve the lives of working people.

AFSCME: American Federation of State, County and Municipal Employees (AFSCME), a union of 1.4 million public service workers nationwide. AFSCME advocates for fairness in the workplace, excellence in public services, and prosperity and opportunity for all working families.

AFT: The American Federation of Teachers is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education.

DLCC: Democratic Legislative Campaign Committee is the official party committee dedicated to electing Democrats to statehouses.

DNC: The Democratic National Committee (DNC) is part of the United States Democratic Party. The committee coordinates strategy to support Democratic Party candidates throughout the country for local, state, and national office, as well as works to establish a “party brand”.

HRC: The Human Rights Campaign strives to end discrimination against LGBTQ+ people and realize a world that achieves fundamental fairness and equality for all

DSCC: The Democratic Senatorial Campaign Committee is the only committee solely dedicated to electing a Democratic Senate. From organizing to fundraising to candidate recruitment, the DSCC works around-the-clock to re-elect Democratic senators and send new leaders to Washington who will move our country forward.

IBEW: International Brotherhood of Electrical Workers, is a union that represents over 820,000 members who work in various fields including utilities, construction, telecommunications, broadcasting, manufacturing, railroads and government.

DCCC: The Democratic Congressional Campaign Committee, the official campaign arm of the Democrats in the House of Representatives. The only political committee in the country whose principal mission is to support Democratic House candidates every step of the way.

International Brotherhood of Teamsters: The teamsters are America's largest and most diverse union. Teamsters organize workers who are ready to bargain collectively, but also perform vital tasks in such areas as pension management, safety & health, community outreach, governmental affairs, and communications.

LiUNA: the Laborers' International Union of North America – is a powerhouse of workers who are proud to build the United States and Canada.

NEA: The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education.

SEIU: The Service Employees International Union (SEIU) is an organization of 2 million members united by the belief in the dignity and worth of workers and the services they provide and dedicated to improving the lives of workers and their families and creating a more just and humane society.

Sierra Club: Grassroots environmental organization.

EL/ EMILY's List: The nation's largest resource for women in politics. EMILY's List helps pro-choice Democratic women win competitive campaigns – across the country and up and down the ballot – by recruiting and training candidates, supporting strong campaigns, researching the issues that impact women and families, and turning out women voters to the polls.

UAW: The International Union, United Automobile, Aerospace, and Agricultural Implement Workers of America (UAW) is one of the largest and most diverse unions in North America, with members in virtually every sector of the economy.

UFCW: The United Food and Commercial Workers International Union (UFCW) is a labor union made up of 1.3 million hard-working men and women in the U.S. and Canada. Its members work in grocery and retail stores, pharmacies, health care, and manufacturing facilities, and in food processing and meat-packing industries.

USW: United Steelworkers, North America's largest industrial union.

Independent expenditures: An independent expenditure is an expenditure for a communication, such as an advertisement through a website, digital device, application, advertising platform, newspaper, TV, or direct mail that Expressly advocates the election or defeat of a clearly identified candidate; and Is not made in consultation or cooperation with, or at the request or suggestion of any candidate, or his or her authorized committees or agents, or a political party committee or its agents.

Coordinated side: The part of a campaign where national committees, campaigns and other entities can work together on strategy and resources to advance overall campaign effort.

Firewall: a part of a computer system or network which is designed to block unauthorized access while permitting outward communication.

Over the wall: The passing of important campaign information, messaging or strategy to part of the campaign ecosystem- where it can be accessed and shared by groups or entities wishing to spend money to impact the outcome of the election but prohibited from directly coordinating with the candidate or campaign committee.

Communications/ Research

Redbox (Redboxing): is a tactic used by campaigns to share certain pieces of communication/ communication strategy (oppo research, ad types, targeting, etc) with PACs, IEs, and other partners where direct coordination is prohibited by campaign finance laws. The name for the practice comes from the red-colored box that often surrounds the instructions for PACs on campaign websites. Red boxes are most often located in the “Media Resources” or “Media Center” sections of a campaign website where political operatives know to look. Instructions sometimes use terms like “hear” for radio ad requests, “read” for direct mail, “see” for television, and “see while on the go” for digital ads

Comms/ Research: communication research is concerned with identifying, exploring, and measuring the factors that surround communication in any form and regarding any topic.

Citation: a quotation from or reference to a book, paper, or author, especially in a scholarly work.

Debate prep: (Debate Preparation): Develop the resolution to be debated. Organize the teams. Establish the rules of the debate, including timelines. Research the topic and prepare logical arguments. Gather supporting evidence and examples for position taken. Anticipate counter arguments and prepare rebuttals. Team members plan order and content of speaking in debate. Prepare room for debate. Establish expectations, if any, for the assessment of debate.

Media prep: The process of preparing your candidate to appear in any form of public-facing media, including TV interviews and print media

Off the record: not made as an official or attributable statement.

On background: A source shares information that a journalist is free to use with one caveat: The journalist should not attribute that information to a specific or named person.

On the record: Used in reference to the making of an official or public statement.

Opposition research book or “oppo book”: The practice of collecting information on a political opponent or other adversary that can be used to discredit or otherwise weaken them.

Pitch oppo: Sharing with reporters information about your opponent (opposition research) in an effort to persuade them to write a negative story about your opponent.

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