The Campaign Plan: Blueprint for Victory

Key Elements of a Written Plan

1. **The Environment:** *Know where you’re going before you pack your bags.*

It is important to start out with a fresh and objective view of the “big picture” by developing a profile of the district or city you want to represent. Think of it as a way to scope out the landscape before a big camping trip or vacation in a different country. Forget about all the things you *think* you know about the district unless you find that your opinions are shared by trusted, experienced advisors. Describe the important features of the political landscape: the peaks and valleys, its natives, and its history. Creating a profile of the district lays the groundwork for evaluating which of its elements will help or hinder your progress toward reaching your destination.

 Be sure to talk to people who you wouldn’t normally talk too. Remember that your friends and political insiders all have more very specific take. The only really way to know what people think is to ask them, but be sure you are asking a good cross section—just as if you were doing a formal poll.

**In writing your summary, answer the following questions**:

* What kind of district is this?
* What are some of its unique characteristics?
* Who lives here?
* What do constituents believe in and care about?
* What are the important voting trends in the district?
* How do people get the news?

**Information needed:**

* Your own personal experience in the district
* Advice from trusted community leaders
* Demographic information, such as census data
* Voting history as it relates to candidates and referenda
* Party registration where relevant
* Voter registration statistics for the current election year
* A ward and precinct map with streets and polling places

**Example:** District 3 is an urban area with a population of about 18,000 residents. About 30% of the constituents are Latino. About 1/2 of the Latino population is under the age of 18 or not registered to vote. About 20% of the constituents are 55 years or older. Seniors comprise

about 30% of the likely voter base. There are 10,632 registered voters in the district, 2,500-3,000 of whom voted in the last two municipal elections…

Senior citizens in the district are very concerned about safety issues, especially in the White Street area… Parents are up in arms about the condition of the elementary school and over-crowding in the classroom, and they are divided on the issue of bilingual education…Young professionals in the Blight Road area are concerned about traffic congestion to and from the expressway at rush hour….

The history of candidates and referenda in the district suggests that a Latino candidate with a record of improving the quality of education in the district can be elected. Specifically, the voting results of the 1999 successful proposition 21/2 over-ride and the narrow defeat of District 3 City Council candidate Humberto Rivera in 1997 demonstrate considerable potential support for a candidate with a similar profile and a strong position on education….

**II.** **Strategy and Message:** *What makes you so special and who is likely to agree?*

Now that you have a picture of the district, lay out your case for why you are uniquely suited to thrive in this environment and win the election. Which of the residents and “natural features” of the district will support your efforts? Which ones will provide challenges? Remember that at this stage there are no guarantees, just educated guesses. The guesses you make are assumptions that can and will be tested during the course of the campaign so be careful to err on the cautious side. And, be prepared to re-examine some of your initial ideas.

**In writing your summary, answer the following questions:**

* How many votes do you need to win?
* Who will be persuaded to vote for you?
* Why will they vote for you (and not your opponent(s))?
* What is your campaign message?

**Information needed:**

* Voting numbers for recent similar elections
* Campaign message
* Candidate’s issue agenda
* Your opponent(s)’ voting record/ reputation/ affiliations and general background

**Example:** Based on the voting results of the last two municipal elections, Sylvia Urrutia needs approximately 1500 votes plus one to win the election in November. Due to her experience and credentials as an education activist and her strong positions on the issue, Ms. Urrutia will

win by attracting major support from parents and teachers with a message of improving the condition of public schools in the district and working for all children.

As a Latina, Ms. Urrutia will also appeal to Latino voters on the south side of the district, with a message of equal representation, improving city services and increasing job opportunities and after school programs for south side residents…. She will also attract support from progressive leaders of organizations in the district who have collaborated with Ms. Urrutia on several local initiatives. Many of her spouse’s colleagues who are small business people can also be counted on to lend their support and enlist the support of others. In addition, neighbors in the Green Square area and women are natural constituencies.

To counter the incumbent’s strong support among seniors, Ms. Urrutia will recruit her in-laws, both prominent members of the district, and the former principal of the elementary school, to do outreach to the older voters in the district. Since Ms. Urrutia’s stance on bilingual education will be a potentially divisive issue, we will craft a careful message that represents her view without polarizing the debate. Bilingual education will not be a leading issue in her message.

To contrast with her opponent’s reputation for being tied into the “establishment” and inaccessible to his constituents as a city councilor, Ms. Urrutia will emphasize her record as an activist who is rooted in the community and motivated by the everyday concerns of most parents in the district. She will emphasize her record of working closely with constituents and building broad coalitions around common issues. Themes of accountability, trustworthiness, accessibility and “putting people first” will run throughout her campaign, informing her voter contact plan, campaign structure, fundraising plan and campaign literature…

**III. Tactics:** *If we build it, they will come.*

Now that you have an idea of who will vote for you and why, summarize the main points of how your campaign will persuade potential voters to support you and get out to vote. Tactics are about *how* and *when* you reach *which* *voters.* Keep in mind that some people might be easily persuaded to support you but not likely to vote. Others are likely to vote but difficult to persuade. These factors will influence the choices you make in targeting your audience, deciding how to reach them, and timing your contact with potential supporters.

In addition, it is important to consider that some tactics are more effective in some districts or with specific groups than others. For instance, in many districts, phone calling is an effective tactic. In others, people move frequently and do not have reliable phone numbers. Door knocking and distributing literature work in neighborhoods where people live close together but are far more labor intensive (and thus less effective hour for hour) in some suburban and rural areas. Likewise, in some districts people watch public access channels and programs

geared toward different ethnic communities and in others they don’t. These factors will influence *how* you choose to get out your message.

**In writing your summary, describe** *which* ***potential* *voters* you will reach out to*,*** *when* **and** *how***. Keep in mind that in most cases you can assume that:**

* Personal contact is the most effective form of persuasion.
* Personal contact with the candidate is a key element in winning elections.
* The earlier a candidate starts door knocking, the greater the chance of winning.
* Persuasion is most effective when it begins at least 2-3 months before an election.
* Effective voter identification is the only “gold standard” for a successful voter contact program.
* Efforts to get out the vote are most effective immediately before an election.
* Successful campaigns contact their potential supporters four to six times during the course of the election cycle.
* In low voter turn-out elections and areas, strong Get-Out-the-Vote efforts are a key component in winning.

**Example:** Of a total of10,632 registered voters in the district, 2,500-3,000 voted in the last two municipal elections. Based on this, Ms. Urrutia needs 1501 votes to win, therefore our goal is to identify 1501 supporters and make sure they vote in November. The campaign will target a universe of 3,500 likely voters from every part of the district for voter persuasion efforts. In addition, we will reach out to 1,000 Latino residents who are citizens but are not likely voters, for our voter registration, voter persuasion and get-out-the-vote efforts.

Within these groupings, we will have a special focus on voters between the ages of 25 and 40 who are likely to have school-aged children, women under the age of 55, and seniors in precincts 12-d and 12-e. Although this is a non-partisan election, the campaign will prioritize registered Democrats and Unenrolled voters within this group because they are more likely to share Ms. Urrutia’s values. We will de-prioritize our voter contact in precinct 12-c, the incumbent’s home precinct, and the most affluent and conservative area of the district.

The foundation of the voter contact program will be the candidate’s door knocking effort, with the goal of visiting 4,000 households in the targeted precincts between May and October. Ms. Urrutia will canvass high and low voter turn-out precincts alternately to show a presence in all parts of the district.

Volunteer canvasses will be another strong building block, recruiting key leaders from each precinct and neighborhood to speak to their neighbors and distribute information about the candidate. Canvasses will begin in precincts where we have willing volunteers and cover areas

where the candidate is not currently door knocking. Canvassing, door-knocking efforts that incorporate voter registration and education, and a strong get-out-the-vote effort will be especially important in the south side of the district, where many of the residents have unlisted phone numbers and are not either registered or likely to vote.

The campaign will begin centralized voter persuasion phonebanks in June, starting with likely voters who have not been reached by canvassing or door knocking and continuing on to reach likely voters who are undecided about who they will vote for. Each potential voter in the target universe will receive two mailings, one in June to introduce the candidate, and one in mid-October with a message targeted to each constituency group: parents, women, Latino voters, and seniors. The campaign will also conduct several major events with seniors, business people, parents organizations and Latino organizations in September and October.

Our get-out-the-vote effort will focus on turning out identified supporters and Latino voters by…

**IV. Organization:** *A lean, mean persuasion machine.*

Now that you have an outline of the activities your campaign will carry out, take a hard look at your finances and people resources, and think about what kind of an organization you can realistically put together to carry out the plan. In this section, outline your priorities and the unique qualities of your organization, summarize the roles and responsibilities of key volunteers and staff, and make a chart of the structure of your campaign.

**Important Questions:**

* Can you afford to hire a full or part-time campaign manager?
* Based on your plan, what are the priority work areas you will need coordinators for?
* Who is qualified and willing to take on coordinating roles?
* Honestly, who can you really trust to come through for you?
* Who will report to whom and how will you create systems of accountability?
* How should all the tasks be divided?
* Who should be included in making important strategic decisions?
* How will you facilitate an effective system of communication?

**Tips on developing a successful organization:**

* Find a campaign manager with strong organizing and fundraising skills who is willing to work really hard, and treat her/him like a partner.
* Generally, try to avoid enlisting family members to play major roles in your campaign. This will protect your close personal relationships from sometimes long lasting negative effects.
* Work out a contract with your campaign manager that clearly divides your respective responsibilities at the outset. Keep in mind that the candidate’s job is to talk to the voters while the campaign manager’s job is to figure out how to do everything else -- including managing the candidate’s time.
* Test people’s capacity to come through before assigning them major roles in the campaign.
* Develop clear roles and responsibilities for key volunteers and staff and write them down in a job description. Make sure you set up a very clear chain of command and supervision.
* Set up effective and inclusive systems of communication and accountability, such as bi-weekly campaign meetings and weekly one-to-one check-ins.
* Recognize from the outset that some people who you want and expect to help will disappoint you—don’t be too discouraged this always happens. But also many people, some you haven’t even met yet, will surprise you with their dedication, passion and work.

**Example:** The Urrutia campaign will build an organization that puts a premium on personal contact activities, specifically door-to-door canvassing and voter identification and persuasion phoning. In order to give the candidate maximum potential to meet as many voters as possible, we will hire a campaign manager, starting full time in June. In filling key positions, we will work to ensure that our campaign committee is representative of the district. Because the majority of our coordinating positions will be held by volunteers, we will seek co-coordinators for key positions so that volunteers can support each other in meeting goals.

As each position is filled, coordinators will be asked to join the campaign committee and attend monthly meetings. As we approach the election in November, we will hold meetings every two weeks and then weekly in the last month. Important strategic decisions will be made by the candidate and campaign manager in consultation with the campaign committee…

**Key campaign positions will include:**

* **A full-time paid campaign manager**, starting in June. The campaign manager’s job will be to recruit and supervise (volunteer) coordinators for all the positions listed below, with particular emphasis on overseeing candidate scheduling, volunteer recruitment, phonebanking, list management, administration, fundraising, endorsements and constituency outreach and the development of campaign literature and mailings.
* **Two (volunteer) phonebank coordinators** who will work in partnership to recruit and train volunteers and supervise phonebanks two or three times a week, starting in June.
* **A (volunteer) event coordinator** who will schedule candidate coffees, fundraisers, campaign gatherings and constituency events.
* **Two (volunteer) volunteer recruitment coordinators** who will work in collaboration with other campaign coordinators, the field director, and precinct captains to recruit volunteers for phonebanking, canvassing, visibilities, poll watching, GOTV and other activities.
* **A (volunteer) field director** who will recruit and oversee precinct captains in carrying out the voter contact and GOTV plan with a specific focus on door-to-door canvassing.
* **A (volunteer) treasurer** who will sign off on checks over $500, review and sign OCPF forms and authorize the use of his/her name on campaign materials.
* **A (volunteer) campaign chair** who will work with the campaign manager to set agendas for campaign committee meetings, chair meetings, and authorize the use of his/her name on campaign materials.
* **Six (volunteer) precinct captains** who will recruit and supervise volunteers in each precinct to conduct canvasses, voter persuasion and identification phoning, visibilities, sign distribution and GOTV.
* **Three to five constituency leaders** representing seniors, women, business people, and leaders of key progressive groups.
* **A (volunteer) Literature Drop** coordinator who will develop and oversee the lit drop the weekend before the election.
* **A (volunteer) Election Day** coordinator who will develop and oversee election day activities.

V. Field: The eyes, ears, arms and legs of the campaign.

This section is an outline for all aspects of the voter contact plan conducted by anyone other than the candidate. Summarize the main activities campaign volunteers will conduct during the course of the campaign to contact their friends and neighbors with your message. Describe your priorities and provide details about how coordination will occur between the central office and volunteers working in their own precincts, neighborhoods and constituency groups.

**Important Questions:**

* Which campaign activities will be carried out centrally and which will be delegated to the field director and precinct captains?
* What is your capacity to build a precinct based field organization?
* How will you coordinate voter contact activities between the field and the central office?
* What are the main activities of the field operation and when will they occur?

**Example:** Field activities will include canvassing door-to-door, voter registration, voter persuasion and identification phoning, holding candidate coffees, distributing signs and bumper stickers, distributing literature, addressing dear friend cards, pollwatching, get-out-the-vote phoning and recruiting volunteers to participate in central campaign activities such as the campaign kick-off, the Puerto Rican Festival and the pre-election rally.

We will build a field organization by recruiting the candidate’s friends and allies and by holding candidate coffees in each of the precincts beginning in May. These intro coffees should be concluded by June, so that we can focus using volunteer and the candidates time to contact

voters at their doors over the summer. We will start with high priority precincts. At each of the coffees we will recruit volunteers to help with canvassing and other campaign activities. After a testing period, we will ask promising volunteers to be precinct captains, with the goal of having all the precincts covered by September 1. Precinct captains will be supervised by the campaign manager while we work to surface a field director(s). Once a field director is in place, s/he will oversee the precinct captains in carrying out the activities listed above.

At the precinct level, major priorities include: 1.) canvassing door-to-door and conducting voter registration in precincts 12-a, 12-e, and 12-f, with the goal of total coverage by the end of July; 2.) Voter persuasion phoning and/or canvassing in the remaining targeted precincts, with the goal of finishing the first round by September 1. Starting a second round of persuasion calling to undecided voters in all precincts September 1 through October 31; 3.) Sign coverage and visibility in precincts 12-b and 12-d and 4.) An intense GOTV effort in precincts 12-a, 12-e, and 12-f; 5.) An increasing focus on holding coffees in seniors buildings September through mid-October in precincts 12-d and 12-f.

Precinct captains will work with the phonebank and volunteer coordinators centrally to recruit canvassers and volunteers from each of their precincts to attend bi-weekly phonebanks at the office and canvass their neighborhoods on designated weekends. The field director will be responsible for providing signs, bumperstickers and Dear Friend cards to precinct captains. Precinct captains will work with the Lit Drop coordinator and Election Day coordinator to organize for pre-election and election day activities. Prior to the election in November, the campaign will hold a training for precinct captains to prepare for the final stretch.

The campaign manager will oversee organizational endorsements and work with constituency leaders, who will be responsible for ….

**VI. Scheduling:** *Priorities, priorities, priorities…*

This section outlines the “field plan” for the candidate by establishing guidelines for the campaign manager and scheduler in deciding where the candidate should be and when. In a campaign, even the main player needs some guidance and structure to get the job done.

**Important Questions:**

* To win the election, what are the most important activities the candidate needs to do at each stage of the campaign?
* How much time will these activities realistically take?
* How can the campaign work to ensure that the candidate has the time and the motivation to accomplish these activities?

**Tips on successful scheduling:**

* Develop a written month by month schedule. Use this to create a daily schedule for the candidate on a week-by-week basis. This creates accountability between the candidate and her/his campaign team.
* Remember that candidates are people, too. Everyone needs some down time. However, the more time a candidate spends managing the database and the campaign volunteers, the less time she spends with voters.
* Prioritize the candidate’s face-to-face contact with persuadable voters who are likely to vote.
* Prioritize the candidate’s time conducting fundraising activities
* Prioritize the candidate’s time with reporters and media outlets that effectively get the word out.
* Take a hard look at your candidate’s strengths and weaknesses, and de-prioritize forums that accentuate her/his weaknesses.

**Example:** From May 15 to October 15, Ms. Urrutia’s main priority will be to knock on 4,000 doors in the targeted precincts, in the following order: 12-b, 12-a, 12-d, 12-e, 12-f. At a rate of 40 doors per every three hours, it will take the candidate 100 three-hour door knocking sessions to achieve the goal. Using this formula, the candidate’s schedule will include door knocking sessions on 100 out of the 180 days between May 15 and October 15. The candidate should plan on door knocking every day, at minimum, five days a week through August 31, for a total of about 240 door knocking hours. As the election approaches, the remaining 60 hours will be spent in high turn-out precincts and include more weekend hours. The campaign manager, scheduler and candidate will check in on a weekly basis to monitor progress and adjust the goals.

The candidate’s second priority is fundraising, focusing on one-to-one meetings with major donors who are able to contribute up to $500 to the campaign. Working with the campaign manager and scheduler, Ms. Urrutia’s goal will be to schedule three meetings each week with likely supporters. Including calls made to arrange visits, this will take about ten hours per week through the end of the campaign. These hours may increase depending on our progress.

The candidate’s third priority is meeting the press….

1. Media: *Your megaphone to the world.*

Think of the media plan as the *indirect* voter contact program, a central and important vehicle for getting the candidate’s message out to the voters. In this section, outline the campaign’s plan for building public support through radio, newspaper, and T.V. coverage. Cover both “paid” media, such as newspaper ads, and “earned” media, such as coverage of campaign

events and interviews with reporters. Some campaigns choose to describe their direct mail program in this section as well.

Keep in mind that media coverage is never guaranteed, especially in small elections. Combine media events with events that accomplish a fundraising or field goal. Be sure to get press at your big fundraisers and invite them to canvass with the candidate.

 **Important Questions:**

* How do people in the district get the news?
* What are the most reputable/trusted sources of news?
* Who runs the main media outlets and what are they interested in?
* Who are the reporters? Does anyone in the campaign have relationships with them?
* What are the deadlines?
* What are the opportunities for political coverage? E.g. radio talk shows, political columns in newspapers…etc…
* What kind of campaign events or issues will attract media coverage?
* Which media forums show the candidates to her best advantage?
* When do most people pay the most attention to political news?

**Example:** The campaign kick off in June will be our first big media event. Our goal is to turn-out over 200 people and have coverage from both of the local newspapers, the South Side Gazette, WBMW, and WBZZ. Ms. Urrutia will write op eds once a month focusing on local education issues and submit them to the Brockelton Telegram. She will also seek an appearance on the Newscape 2001 program on local access cable TV. The campaign will run an endorsement ad in both local papers and in the South Side Gazette the week before the election.

Our “earned” media campaign will work to get coverage of the campaign kick-off in June, a ribbon-cutting ceremony celebrating funding for new computers at the high school in September, and the candidate’s debate sponsored by the Brockleton Civic Association in October. Ms. Urrutia will set up meetings with the editorial boards of both papers in early October in preparation for their endorsement decisions.

**VII. Finances:** *The fuel in the tank.*

This section outlines the plan for raising the funds needed to run the campaign. Describe the activities and approaches you will use to raise money, including your priorities and timing for each event or approach.

**Important Questions:**

* What is your fundraising goal?
* When do you need the money?
* Who are your potential donors?
* How much can they give?
* What kind of approach is most effective with each individual and/or group?

**Example:** Based on our budget of $25,000 and our assessment of the candidate’s potential donor base, we will focus the largest percentage of our fundraising efforts on the candidate’s one-on-one meetings with individuals who are capable of giving $100 to $500 to the campaign. Many of these are businesspeople, civic leaders, family members and close friends. Our “major donor” fundraising goal is $19,000. In order to meet this goal, we will seek 15 contributions of $500, 30 contributions of $250, and 40 contributions of $100 The candidate will have one-on-one meetings with at least 80 prospective donors in the $250-$500 range, beginning in June. The campaign will reach the $100 donors mainly through the candidate approaching friends and family, a direct mail solicitation in early September and holding a $100 per ticket dinner sponsored by prominent businesspeople in late September.

An additional $4,000 will be raised through four fundraising events scheduled for June, July and October, projected to raise $1,000 each. The remaining $2,000 will be raised through candidate coffees, small fundraising events, and volunteer solicitations.

**Attachments:**

You should also develop and include the following information with your plan:

* **Campaign Timeline**
* **Budget**
* **Campaign Structure**

**SAMPLE CAMPAIGN BUDGET**

**Category Amount Total**

**Personnel**

Campaign Manager @ 6 months

 Payroll

 Taxes

 Benefits

Administration

Rent & Utilities

Furniture/Office Equipment

Computer

Phone Installation

Phone/FAX use

Letterhead and Envelopes

Copying

Office Supplies

Miscellaneous (Coffee, volunteer snacks)

**Fundraising**

Printing invitations/envelopes

Postage

Event costs

**Media (Paid)**

Newspapers/Publications

**Field/Voter Contact**

Persuasion/Direct Mail

Brochures

Palm cards

Campaign Literature

Dear Friend cards

Yard signs

Bumper Stickers

Voter Lists

Election Day expenses

**Total**