ARE YOU READY TO RUN?

THE CAMPAIGN WORKSHOP

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INTRODUCTION

Are You Ready to Run?

As a political consultant, staffer, manager and trainer, I have been working with candidates for elected office for twenty-five years. Being a candidate is hard, as is being the spouse or family member of a candidate, so it’s important to really do your homework before making the decision to run.

In my time in politics, I have always been puzzled by the way that some candidates make the decision to run for office and the lack of information about what folks really should be thinking about and doing before they run. This book is designed to help potential first-time candidates walk through the questions and considerations involved in making an informed decision to become a candidate.

For starters, most people who run for office in this country do not win. It is simple math. With primaries, general elections and run-offs, the competition for elected office is tough. So if you’re thinking about running, make sure you put yourself in the best possible position to win before taking the plunge.

That means conducting a real assessment of the resources you can bring to a race and your realistic chances of winning. You have three resources in a campaign: people, time and money. Take the time to determine what resources you have, what resources you will need, and how you’ll pull it all together. Doing a full assessment will help in your preparation, but don’t stop there.

Before you run, you should also take the time to ask yourself why you are running, and if running for office and being in office is really what you want to do. Will you do what it takes to be a committed candidate? Raise the money? Knock on doors? Meet voters? All of these things will take time away from your job and your family. For many, the cost of what it takes to win is something they don’t fully appreciate before their run.

Many of the challenges of running for office are related to fundraising. Although most candidates recognize the need for fundraising, sitting and doing call time four to six hours a day is not something that many candidates are dedicated to doing. You don’t have to love fundraising, but you do have to do it. Every year, candidates look for a way out of doing call time. Can I raise all my money online? Can I hire a fundraiser to come in with a magic list and do it for me? The answer is no. Dedication to call time is what separates great candidates from the rest of the pack.

Another challenge of preparing to run for office is making sure you are running for the right reasons. Revenge is not a good reason to run, and neither is blind ambition. When you run, you need to think about what you want to do when you are in office, what change you want to bring about and what change you can really make. The reality of government today is that it takes a lot of work and time to get something done and we need good people, on both sides of the aisle, in order for the system to work.
With the way districts have been drawn across the country, picking the right opportunity and deciding when and where to run, can have almost as much of an impact on your chances of winning as the campaign will. If you decide to run in a district that has a Democratic performance below 40 percent, then the chances of winning as a Democrat are very slim. Democrats currently don’t hold a seat in Congress that is below a 44 percent Democratic performance index.

One of the most important pieces of advice I give candidates is to start early. I have trained candidates for office who are two weeks out from their elections and ten years before they run. In my experience, the most successful candidates think about their race at least a couple years before they run. This ensures that when the right opportunity comes along, they are ready.

Beyond starting early, it’s important to get buy-in from your family. Running for office can take a toll on your family and close relationships – even causing break-ups. And if you have kids, having a parent who will be gone most nights and weekends can be hard on your family. If your family is not on board with the concept of running and serving in office, it can be challenging in both the long and short term. Make sure you sit down with your family and have a conversation before you run.

Although you are the candidate, it’s important to recognize that the election is not about you; it’s about the voter — the changes they want, and the future they want for their family. You are the agent of that change, and knowing for whom you’re fighting and why you’re doing it will make all the difference.

Once you’ve done your assessment, picked your opportunity and gotten family buy-in, you will want to make sure you actually have a written plan. Many candidates don’t have a written plan, but you wouldn’t go into business without a business plan – why would you run a campaign without a campaign plan?

We go into all of this in more detail in the ebook, and we hope you find this helpful as you run. As a consultant and manager, I am lucky to have worked with some amazing candidates who have run for the right reasons. Politics is not easy but we need good people to run for office and win, now more than ever.

As always, these ebooks are a collaborative effort. I am lucky to have a great team that shares in our mission to teach and share what we know. Ben Holse and Sophie Thurber did a great job on the editing of this book and contributing to the writing, as did the rest of The Campaign Workshop Team, Margo, Lizzie, Andrew, Shelley, Michele and Kelley.

But it does not stop there, I also want to thank past TCW team members, our families, candidates and clients who we have worked with. I hope this book can help folks run, win and change our communities for the better.

— Joe Fuld
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Are you ready to run?

Do you have a passion for public service?

Do you have an office in mind?

Are you qualified?

Yes!

I do.

Naw, not really...

I do not.

Great! You need that.

Once you do, come back and finish.

Where you should rethink this career path.

Are you running to see your name on a billboard?

No, I know that’s not effective messaging.

Good, because billboards are probably not in the budget.

Is that the only reason?

Duh!

Sure everyone’s time and money and buy one for yourself.

Willing to ask your friends & family for$?

No, that would be awful.

If you can’t get their support, good luck getting other supporters.

As much as I don’t want to, I know I have to.

Good answer. They will be your start-up money and the easiest to get.

I can maybe raise a couple of $100.

You’ll need to be able to identify at least 10% of your overall budget from your network before moving on.

I’m not the best fundraiser, but I think I can.

That’s ok, you’ll hire a fundraiser to help with the call time. You just need to commit to do it.

Can you raise enough$ to win?

I have not.

You should start now.

Your announcement should be a surprise to local leaders and politicians.

So if you’ve made it this far it looks like you could be ready!

Yes, but this looks like more work than I thought.

Not sure if it’s for me.

That’s completely ok! Public office is not for everyone. Better to figure it out now than in the middle of the campaign.

So do you think you’re a viable candidate for office?

Yes, I have!

Awesome, you’re already ahead of the game.

Yes, I think I am!

Great! You have just enough ego needed to run for office.

So what are you waiting for?

The correct answer is: The best opportunity for you to win.

Best of luck! If you have any other questions about running for office, contact us.
Before You Run

Are You Ready to Run?

Some people think they are born to run for office: just hand them a campaign plan and microphone, and they are ready to go. But it takes a lot of hard work to get elected. Politics is about relationships. The better and deeper your relationships are in your community, the easier fundraising, volunteer recruitment, and convincing voters you are the best candidate will be. That’s why many of the best candidates are the ones who come to politics as their second or third career.

With that said, here are some important questions to ask yourself before you run for office:

Are you sure you want to be an elected official?

Public service is not easy. In fact, some candidates say campaigning is easier than holding office. Talk to others who have been in office and their families. Make sure
you and your family are willing to make the sacrifices politicians and public figures have to make before you run.

**Have you talked to your family and friends?**

You aren’t running alone. You need the support of your family and friends. Most of your fundraising and volunteers will come from your inner circle. If you don’t have their support and buy-in, you are unlikely to find it among the wider public.

**What have you accomplished?**

For the most part, voters choose candidates that they think will get things done once elected. Do you have a track record of achieving positive change in your community or throughout your career?

**Do you have a network?**

Identify your friends and potential supporters, and build a list of the people who can help you. You should also create a detailed, personal assessment of how the people on your list can help you. This assessment will be the backbone of your campaign and fundraising plans.

**Have you done your politics?**

Talk to the leaders and activists in your local political party. In most cases, you will need to build your own organization, but it won’t come from thin air. You’ll need to rely, in part, on the existing establishment in order to move forward.

**Have you gone through a campaign training?**

Lots of groups conduct trainings that you and close members of your team should attend, ideally a couple of years before you run. They will teach you how to plan and prepare for a campaign.

**Have you saved up money?**

Running for office is often a full-time job and there are a lot of personal costs involved. Make sure you are financially secure enough to take a few months off of work to dedicate to your campaign.

**Do you have the time to run?**

You will need to make fundraising calls for 3-4 hours a day, and knock on doors for 3-4 more hours. There are also seemingly endless meet and greets, coffees, events, rallies, local fairs, debates, debate prep, and much more. Can you take the time off to do this?

“Some people think they are born to run for office: just hand them a campaign plan and microphone, and they are ready to go.”
Can you win?

Don’t run if you cannot win. Instead, wait for a different opportunity, or find another race you can win. There is no point to wasting the time and money of your friends and family on a race you have no chance of winning. Winning needs to be an essential part of your campaign planning.

The Importance of Self-Research

Many candidates and campaigns recognize the importance of opposition research, but some forget to do research on themselves. After you’ve assessed your opposition, you need to research yourself because:

We don’t remember everything.

It’s impossible for anyone to remember every detail of their life. A best practice is to have professional researchers comb through your record, especially the parts of it that are publicly available or on the Internet.

What you thought was unimportant could be a powerful negative.

Running for or holding public office means private information and all of your public records will likely be thoroughly evaluated. One quote in a local paper with the proper context can seem entirely reasonable. But without that context, it could be fodder for your opponent’s campaign.

If your researcher can find it, so can the opposition.

You will need to be prepared to respond to negative attacks. Anything from your past, especially if it is embarrassing or can be misconstrued, is something opponents could use. The smartest campaigns know what is out there and are ready to respond.

We live in a digital age.

It’s important to remember that we live in the digital age where an abundance of information is available, literally at the user’s fingertips. Editorials or social media posts will, effectively, live online forever. It’s better to be prepared than to be taken off-guard in these situations.
Answering the “Why are you running?” Question

For some, “Why are you running for office?” is an easy question to answer. For others, there may be a murkier answer. But knowing why you are running for office and what you want to do when you get there is critical to being a successful candidate.

Ted Kennedy’s famous non-answer to the “why” question in his 1980 presidential campaign is a historical lesson about not having your heart in the race. But there are countless examples in less high-profile races of candidates who couldn’t provide an answer to that question.

Running for office for the right reasons is critical, not only to gaining support, but also to winning. If you lack passion, that will be evident to voters. Think long and hard before you launch your campaign, because you don’t want to commit to a race you don’t want to be in or a race that you can’t win. Or even worse, get elected to an office only to realize you really don’t want to do the job. Here is a breakdown of the right and wrong reasons to run.

Right reasons:

To help your community. This is a common reason to run for office. You see your community needs help, and you believe you have the skills to fill that need.

Advocating for causes. There is a specific cause or policy that affects your community, and you feel that you can make a real impact on the issue by running for office.

Wrong reasons:

The party asked me to run. Just because someone in the party asks you to run does not mean they have your best interest in mind. Having the party ask you to run can be a great start if you have other reasons for running, but running for office to please someone else is a bad idea.

Revenge against the incumbent. “The incumbent did something to me so I’m going to beat them,” is not a good reason to run for office. Make sure there are other
motivations that drive you.

*Because I can win.* It’s important that you have a chance of success in your campaign, but don’t run just because you think you can win.

A canned answer about why you’re running is not good enough. If your heart is not fully in the race you’ll know, and so will voters. Don’t run if you don’t know why you are running.

**Tips for First-Time Candidates**

As a first-time candidate, you will likely have a steep learning curve. A lot of information will be thrown your way all at once. Whether you’re still deciding if you want to toss your hat in the ring, or you’re starting to get your campaign moving, it’s important to go in with your eyes wide open. Consider the following as you move forward:

**Fundraising is the candidate’s job**

Many candidates learn the hard way that though they may be powerhouses when raising money for charity, political fundraising is entirely different. Fundraising for a political race is tough and takes a significant amount of time and energy to achieve your goals. Hiring a fundraiser can be helpful, but it’s not a silver bullet. The candidate is still expected to do most of the heavy lifting.

**Don’t count the money until it’s in bank**

You can certainly hope that an outside group will want to invest in an independent expenditure campaign on your behalf, but your campaign has to be able to exist without outside help.

**Seek endorsements**

Endorsements provide shorthand for informed voters about what you stand for and who stands with you. They also signify that reputable sources think you are a viable candidate. Put together a list of the people and groups whose support you want.
Study what issues they care about, and whether they align with your positions. Then schedule meetings and ask for their support. You are not going to get every available endorsement, but you will never get them if you don’t ask.

**Endorsements don’t decide elections**

Endorsements are an asset, but not the sum total of your campaign, and they’re generally not the deciding factor in an election. Your campaign plan should devote at least 70 percent of your resources to direct voter contact. And as a candidate, your focus should be on securing the resources required to make that plan a reality.

**Don’t confuse your inner circle with the electorate**

Running for office, especially for the first-time, can be intimidating. It’s important to have an inner circle that you trust and who will support you through it. But don’t get too caught up in any of the perks or adulation that come with having a core group cheering you on. Remember that there are a lot of voters who you need to convince, and that running for office is never easy.

**Resources are limited**

All sorts of people (including your inner circle) will come to you with ideas about what you have to do to win. It’s important to know that there is no exact tactical formula to follow in order to win a campaign (though gathering as much money as you can is always a big help, no matter the circumstances), which means that how you spend your resources depends on context and planning. Campaigns are generally run with finite resources. Smart and sometimes difficult decisions need to be made about what you can and cannot do.

**Be careful with advice**

Throughout the campaign you will hear from people who have strong, but misguided, opinions about strategy. Obviously, you don’t want to alienate people who mean well and want to help, but you also don’t want to waste time and resources. Have a plan for dealing with those situations in advance. Think about how you can effectively use their help without giving them access to the decision-making process.
Common Missteps of Local Candidates

Local campaigns share many similarities with larger races, but there are a number of unique elements to consider. For example, you will still have to work hard to raise money, but local candidates are more likely to seek donations from members of the local community. Often, the individuals running in local elections are making their first attempt at elected office and will not have paid aides or consultants. Read on for help in avoiding some of the most common mistakes local candidates make.

No strategy

Some local candidates believe it is sufficient to simply attend local events, like a pancake breakfast or a church’s annual spaghetti dinner, and interact with the individuals there. However, these attendees do not necessarily share any common characteristics. While it’s important to be present at high visibility events, you could potentially be interacting with voters who would never consider supporting you, or even people who don’t vote at all. In order to run an effective campaign, you need a strategy to identify and communicate with the people you need to persuade to vote for you and the people you need to show up on Election Day. Then work with your state or county party to gain access to a voter file and go door-to-door to talk with these individuals.

No message

Some local campaigns use yard signs as their primary means of communication. But yard signs are expensive and an inefficient means of communicating with voters. The same goes for bumper stickers, campaign buttons, and t-shirts. Focus on your message: who you are, where you stand, and what you plan to do. Evaluate your budget and decide what makes the most sense in order to get your message out there, be it TV, direct mail, digital ads, radio or phones.

Lack of resources

To run an effective campaign, you need to commit your personal resources. That means taking time off from work so you can contact supporters, knock on doors, attend events and raise money. You also must be willing to ask your family and friends to devote their time and money to your candidacy. This can feel like an awkward request, but family and friends are the foundation of your campaign, especially for local candidates. If you’re not in a position to do this, consider putting the race on hold.
Candidate Training

The Importance of a Political Candidate Training

Whether you want to learn the basics or keep up with new trends and technologies, a campaign training is a worthwhile investment. Many people and organizations learn it on their own, but getting ahead of the learning curve is an advantage that may make the difference between winning and losing. These trainings provide a solid foundation for how to best organize your campaign and will provide your campaign with the knowledge to mount a strong, competitive campaign.

Determining who needs to be trained is a good place to start. Take stock of your skill level and that of your staff. Experienced candidates and campaign managers have different needs than people just starting out in politics. Large and joint campaigns may even need training trainings for their entire group or a custom training that is create for a very specific purpose. An existing training conducted specifically for the group may be more efficient than sending staff to myriad workshops.

You should also think about how you can get the most out of your training. Before signing up, consider whether a certain type of training is conducive to your learning style. Ask past trainees about the pros and cons from their perspective.
Finding the Right Campaign Training Program

If your goal is to work on a campaign or to run for office, it's important to look for opportunities to gain skills, knowledge and experience. There are a lot of different programs of varying quality out there. These are a few tips to help you separate the wheat from the chaff:

What makes a quality training?

Seek out training programs with a strong track record and consistently high attendance rates. Before signing up, determine the quality of each program and look at who is leading the sessions. Just because someone has previously worked on a few campaigns does not necessarily mean they are a good trainer. Training programs are more than just a PowerPoint. Time and effort should go into developing a curriculum, formulating breakout sessions, and making lecture material accessible. Speaking with past trainers and participants can help you judge the quality of the program.

Pay for a training, not hands-on experience.

The costs to attend a training program run from approximately $300-$500, usually including the costs of housing and food. Luckily, some training programs are free or will offer full or partial scholarships if you are not in a position to pick up the full cost.

There are a few campaign training programs out there that require trainees to pay for the hands-on experience of working on a campaign. Working on your first campaign is an investment – one that is made through long hours and tough work. For some staffers, the amount of pay they receive is minimal, but whatever the job description, there should always be some basic compensation. There are enough opportunities that you should not have to pay for the chance to work on a campaign.
Campaign Training Options

Several organizations conduct campaign training programs around the country. Below is a brief list of organizations that offer strong campaign training programs to help you begin your search.

- Annie’s List
- Democracy for America
- Democratic Gain
- Emerge
- Emily’s List
- Front Line Leaders Academy
- New American Leaders
- New Organizing Institute
- Planned Parenthood of Arizona
- Progressive Change Campaign Committee in Austin, TX
- Progressive Majority
- Running to Govern Southwest Voter Registration Education
- Truman National Security Project
- Wellstone
- Women’s Campaign Fund
- Running Start
- Midwest Academy

Many colleges and universities offer seminars and lectures on how to run a campaign. They are an alternative to help determine your level of interest in running a campaign or running for office. Note, however, that often these kinds of seminars are not always comparable to organization-and consultant-run programs. They are likely to be more focused on specific topics, such as advocacy, research, policy, or politics in general. Do your research and make comparisons.

- American University: School of Public Affairs – Campaign Management Institute
- Harvard University: Institute of Politics
- University of Texas, Austin
- The George Washington University
- UCLA: Luskin School of Public Affairs
- University of Virginia: Sorensen Institute for Political Leadership
- Yale University: Women’s Campaign School
Organizing Your Team: Staff and Volunteers

CHAPTER THREE

Campaign Staff Structure

Before you run for office, you’ll need to figure out who will make up your team. A candidate’s campaign staff is incredibly important in making a campaign successful, manageable, and fun for the candidate and everyone else involved. Obviously, larger campaigns will require a more robust team, but even a small campaign will need a few essential staff members.

Campaign manager

Your campaign manager is the most important role you’ll need to fill as you’re thinking about running for office. Your campaign manager will take the lead on everything relating to your campaign, so it should be someone you trust and respect. It should not, however, be you, the candidate. It also shouldn’t be your spouse, a family member, or a close personal friend. You need someone who can be the intermediary between you and the rest of your staff and consultants (if applicable). This individual also needs to be willing to stand up to you and tell you when you are wrong, without fear of damaging a personal relationship.

Finance director

One aspect of running for office that almost every candidate complains about is asking people for money, but it’s absolutely essential to running a successful campaign. You’ll need someone who can organize and manage the process of raising money (including making sure the candidate is
holding up their end when it comes to fundraising activities). A fundraiser will help you assemble call sheets and customize asks to each individual donor. For many campaigns, they are a critical element to meeting monetary goals.

**Field Coordinator**

Regardless of the size of your campaign, you’re likely going to rely heavily on volunteers and field staff. Having someone who can manage those people and their workload will help keep things running smoothly. This should be someone who can manage a lot of moving parts at once and who the volunteers enjoy working with – so they will keep coming back to help.

**Consultants**

Chances are you won’t be able to hire people for every job that needs to be done on your campaign, and that’s fine. That’s where consultants will be an important element of your campaign. You can use consultants for your communications efforts (digital, mail, television), general strategy, field, phones, and more.

Building your campaign team is an important part of the process in running for office. Take your time and make sure you’re surrounding yourself with people who are loyal and trustworthy, but who aren’t afraid to tell you when you’re wrong or making a mistake.

**The Benefits of a Full-Time Campaign Manager**

Running for office, particularly the first time, is a daunting task. Raising money, especially if you have never done it before, can be overwhelming and uncomfortable. This may lead a candidate to decide against hiring a full-time campaign manager as a way to conserve money. Having a campaign manager, however, can be the key to winning. Here’s why:

**You can’t do everything**

There aren’t enough hours in the day. You have to delegate to stay on track and organized.
You need somebody to hold you accountable

A campaign manager’s job is to ensure that you make all of your fundraising calls and connect with voters every day. Having your time micromanaged isn’t fun, but that’s what it takes to win.

You have a designated “bad guy”

If you don’t have a designated “bad guy” to help, for example, pull you away from a chatty voters, you will get stuck at an endless bake sales and community meetings. Your campaign manager can play the role of the “bad guy” who can keep your schedule moving.

You gain an objective view

Throughout the course of a campaign, you can get lost in the back-and-forth with the opponent. You may not see the forest through the trees. Your campaign manager can help you step back and take a rational look at the situation, as they are in a more objective position than the candidate.

You need a professional with experience getting people elected

For the most part, your manager shouldn’t be your spouse or a friend who does it part-time. You need a professional who knows what it takes to win and will be able to keep your campaign on track.

Hiring a campaign manager is a significant expense. Depending on the type of race that you are running and the experience level you need, the cost to hire a campaign manager will vary.

Generally, the costs of hiring a campaign manager are as follows:

- State legislative race: $2,000 - $4,000 per month
- Congressional race: $4,000 - $8,000 per month
- Statewide race: $8,000 - $12,000 per month
- Municipal race: Depends on the size of the locality/race

Please note that cost will vary regionally and based on the size of the race. For instance, a campaign manager for a state assembly race in California will cost a lot more than a manager in Nebraska due to size of the district and the campaign’s budget.
Beginning the Volunteer Recruitment Process

Volunteers are the backbone of any good campaign, and recruitment should start as soon as possible. Volunteer recruitment is one of the toughest challenges in any campaign. There is no one-size-fits-all formula – it’s hard work and needs to be tailored to fit the dynamics and personality of each campaign. With those caveats in mind, below are a few general tips to help begin the process:

Reconnect with past volunteers

Reconnecting with individuals who have volunteered for your past campaigns or similar campaigns (talk to past candidates, they may be willing to share lists) are the best places to begin recruitment.

Reach out to motivated supporters

After exhausting your previous volunteers, move on to your motivated supporters. There are a number of ways to identify these individuals. Be creative in how you find them. Below are some suggestions to recruit motivated supporters:

- Ask regular volunteers to give you a list of three people they believe would make good volunteers.
- Develop creative ways to draw out likely supporters. Make note of the people who pick up free yard signs, attend your meet-the-candidate events, or join a debate watch party. Follow up is key. Reconnect with these individuals within 48 hours of your initial contact.
- Instruct canvassers and phone bankers to ask the most enthusiastic people that they encounter to volunteer.
- Conduct volunteer recruitment calls from the ranks of the “super-voters” – the people who vote in every election, including low turnout, off year elections.

Be ready for walk-ins

While not a sustainable resource, you may have an occasional volunteer who walks into the office. Make sure the outside of your office is welcoming, that you have
a sign up sheet to capture the person’s contact information and interests, and something for them to do. Keep a few extra phones or canvass packs ready so you can put them to work immediately.

Put yourself out there

People likely to say, “No,” over the phone often have difficulty doing so in person. If someone expresses interest in the campaign at the grocery store or your local diner, take down their number and ask if they can join you for a phone bank the next day. Be willing to put yourself out there. The worst that they can say is, “No.”

Retain your regulars

Be sure that your existing volunteers stay active. Below are a few tips to maintaining volunteer engagement:

• Never let a volunteer leave your office without scheduling their next shift. If a volunteer insists that they need to look at their calendar or check with their spouse, be sure to follow-up the next day

• Value your personal relationships. This cannot be overstated. Volunteers often come for the campaign, but come back because of the friendships and relationships they establish. Learn their names. Find common interests and passions. Smile. Listen more than you talk. Keep conversations light. And use humor when possible.

• Be specific when asking a volunteer to return. Give them a “hard ask” by including specific details about what you need and when you need it. Instead of using open-ended language like, “Do you have time next week to come back?” say, “Can you join us September 12 at 6PM for a phone bank?”

“Volunteers are the backbone of any good campaign, and recruitment should start as soon as possible.”
Creating Your Initial Plan

The Importance of a Campaign Plan

Every campaign comes with a number of unknowns, and you can’t account for everything. The more you plan, however, the better prepared the campaign will be to deal with the unknowns – and the more likely you are to win.

Campaign planning includes a number of elements. The most important of which is the budget, which should account for estimated cash intake and outflow. It may seem like common sense, but many campaigns do not create a budget. Your budget’s estimated intake should reflect your fundraising plan. Knowing what you are spending and raising — from your campaign manager’s salary to office supplies — will make a difference in managing your resources and conserving dollars so you can go full force during the campaign’s home stretch.

Planning ahead means thinking carefully and critically about when and how you spend money on voter communication. At least 70 percent of your campaign funds should be directed toward direct voter communication — direct mail, television, digital advertising and the field program.
The further ahead you plan, the more likely it is you'll be able to control what you are spending and avoid getting stuck with rush fees. This is particularly true when it comes to things like TV, where competition for space and rates increases the closer you get to Election Day. The sooner you can lock in your ad buys, the more likely it is that you can purchase the number of points you need to be competitive.

While digital advertising can seem infinite, the reality is that there is a finite number of people who visit any given website. Web publications, in turn, can only sell a finite amount of impressions (a measure of the number of times a digital ad appears on someone's screen). Depending on the area, around Election Day impressions are likely to become very popular and may even sell out. Reserving digital advertising space early in a campaign can help make sure you have your communication resources reserved in advance.

10 Questions Your Campaign Plan Should Address

It’s important that you write a campaign plan in the earliest stages of your campaign. The document should lay out the overall theme, strategy, and objectives of your campaign. Be comprehensive and cohesive. Addressing the following key points will help you develop your plan:

1. **Do I have a winning strategy?**

   When you write a campaign plan, run to win. Take some bold stances and calculated risks. If you spend too much time worrying whether you are saying the right thing, you are not being bold enough.

2. **Am I raising enough money?**

   You cannot win with a campaign built around the lowest budget. Rather, fundraising should be built around a budget that will give you enough room to maneuver and the tactical support to win.

3. **Am I spending money on the right things?**

   The best and most successful campaigns are financially disciplined. They are focused and understand that they can only spend money on necessities. These campaigns will only spend money on tactics that help to define why voters should vote for them over their opponent. The worst campaigns waste money on elements that don’t communicate a contrastive message, like yard signs or bumper stickers.
4. Am I hiring the right staff and consultants? Did we create the right roles?

For any campaign, you want to have a strong, experienced team. Think long and hard about who is on the team and whether they can help you win. You should also think about whether your campaign has a solid structure and if the right roles exist.

5. Do I have a vote goal?

How many votes do you need to win? Where will those votes come from? Your campaign plan must answer these questions. See the following section for more detail on determining your vote goal.

6. Do I know who my voters are?

In addition to having a vote goal, it’s important to understand which voters make up your vote goal, and who makes up your winning coalition. For instance, are there enough likely Democrats in your area that you can focus on turnout? Or do you need create a robust persuasion program? If so, who do you need to persuade? Are there enough independents to make up an effective persuasion universe, or do you need to add soft Republicans?

7. Does my strategy connect with the right voters?

What you communicate must connect you in a clear way with the audience you need to persuade. For instance, if your strategy is to persuade soft Republican women, are you speaking about the issues that would resonate with these targets? Be sure you are connecting your message to your targets.

8. Is my message contrastive enough?

To be effective, voters must understand what sets you apart from your opponent(s). If you can’t articulate that difference in six words, refine your message until you can.

9. Is this the right race for me?

Before you decide to move forward with a campaign, make sure it is a race in which you can win. If you can’t win the race, do not run.

10. Are the right people on board with my campaign?

Beyond paid staff and consultants, make sure your friends and family, issue groups, business leaders, unions, etc. are on board. You need to build a coalition of the right people in order to win.
Creating a Vote Goal

Your campaign has one goal: to convince enough voters to show up to the polls on Election Day (or for early voting, or absentee voting) and vote for you. Your vote goal is the number of votes needed to win your election, and it should be an important element in your planning that guides every decision the campaign makes.

Your vote goal will depend on the individual race and the estimated percentage of voter turnout. In a two-person race (usually a general election or run-off), it is one more than half of the votes cast on Election Day — or 50% + 1. In a multi-candidate race, your vote goal may be less than 50% of the votes cast. Depending on the election rules, you may be able to win with a plurality of the percentage of votes that are cast, or the top two vote-getters will be forced into a runoff. It's important to understand what impact a multi-candidate field can have on your race.

To determine your expected vote goal in a two-person race, answer the following questions:

1. What percentage of registered voters in your district turned out to vote in the last similar (i.e. primary or general and off-year, midterm or Presidential year) election?
2. What is the number of current registered voters in your district?

Answers to both of these questions can be found by calling your state or local elections board. Multiply these two numbers together to determine your expected vote. To allow for a comfortable margin of victory, it is strongly recommended that you plan a vote goal strategy around 52% of the expected vote. Multiply your expected vote by .52 to determine your vote goal in a two-way race.
Determining How Much You Can Raise

Fundraising is never easy, and predicting your campaign’s ability to fundraise can sometimes be even harder. But before you run, you need to have a strong understanding of your fundraising potential. Below are items to consider when determining how much you can fundraise:

**Conduct an assessment.**

Assign a reasonable amount of what you can raise from everyone within your immediate network. Have someone who knows you and your network review the assessment. Then, have a fundraiser review the assessment as well.

**Make sure it is enough.**

After you’ve finished your assessment, look at what past campaigns have spent in the area. Then, set your overall fundraising goal. Be sure that your overall goal is to significantly outraise past campaigns.

**How close is your assessment to your goal?**

Once you have both your assessment and your goal, you can conduct an overall assessment of your fundraising viability. Are you half way there? A quarter of the way there? Being a third of the way to your goal is a strong starting point if you are two years out from the election and have more time to list build. But if you are running in a special election in the next week, it will likely not be enough.

**Use your greater network.**

Think about other folks who could potentially give to your campaign. This group could include organizations you belong to or organizations that hate your opponent. But be conservative; remember the majority of your fundraising will come from your direct contacts and not from strangers.

**Try again.**

Conducting a full financial assessment is not something that you will do just once. After you’ve put together your assessment, go back to it a few days later and see if you missed the names of any family, former coworkers, folks you went to college with, etc.
Potential vs. reality.

It’s important to recognize that having the potential to raise a lot of money does not mean that you will be able to actually raise that amount. Not everyone within your network will give to your campaign, or will give the amount that you feel they have the capacity to give.

And remember, your assessment is just a spreadsheet. The only way you can make this spreadsheet a reality is by diligently making calls to friends and family for four to six hours a day, everyday, for a year.

Fundraising: A Few Takeaways

Running for office is tough, and it is certainly not for everyone. Raising sufficient funds to run your campaign is critical to success, and as mentioned above, it’s one of the most difficult parts of any campaign. No one is going to just give you money when you qualify for the ballot. Though it depends on circumstances, hiring a fundraiser is likely a good idea. Fundraisers, however, are far from a silver bullet. As a candidate, you will still have to put in the time and the effort to help raise funds. When it comes to fundraising, here are some critical takeaways:

• The RAT method
  Reason, Amount, and Time (RAT) are the three core elements of a fundraising ask.
  - What is the reason you need the money?
  - What is the amount of money you need?
  - What is the time you need the check by?

• Remember to follow up and thank people.

• Have someone with you to take notes and keep you on task when you’re making phone calls. Depending on your staff structure, this will either be your fundraiser or your campaign manager.

• Have a call book with research on your donors. Note what each individual ask should be and what follow up you need.

• Have a call sheet for each donor. This will have all of the contact information for the individual donors you will be calling on any given day and will include what the individual monetary ask should be for each donor.
• Don’t assume a donor will give you all the money you want in one chunk; you will likely have to call people multiple times and have multiple conversations in order to get the entirety of what you think they can give.

• Start early. Campaigns are marathons, not sprints.

• Following up is key. Remember, promises for donations are great but won’t help your campaign until they are actually in the bank account.

• Have a written schedule. Time management is important for good fundraising.
Political Consultants

Hiring a Political Consulting Firm

Political consulting firms are not something every campaign will be able to afford. While your campaign may be able to cover some of the roles political consultants play, not every job can be done in-house at the requisite professional level. When considering hiring political consultants, ask yourself: “What kind of help do I need?” and “Can a political consulting firm provide those services within my budget?”

The following steps should help you determine if you need an outside firm and how to hire one.

Know what you need

To begin, identify the service or product you need from the consultant.
Do you need help with direct mail or TV production?

Do you want a larger firm that performs many services or a series of firms that specialize?

Will this be a local, state, or national campaign?

What is your overall budget? How much can you afford to spend?

Once you’ve identified the help that you need, the next step is to write a Request for Proposal (RFP) to send to a select pool of political consulting firms. Some of the items that you should be sure to ask for in an RFP are:

- A full account of the company’s pricing structure
- Company background
- A list of relevant experience
- Bios of the individuals who will work on your account
- A list of references

It’s also important that you include in the RFP a full description of the products and services you would like to have, a bit of background on your candidate/campaign, your campaign’s prospective budget for these services, and a deadline for submissions. This provides potential firms with an idea of what you need and what they can provide. Responses to the RFP should follow a template of sorts, allowing you to better compare each application during the review process.

Find a list of firms

Once you have an RFP, you need to find a group of consulting firms who want your business. Ask other candidates, political allies, and organizations for recommendations.

Compare apples to apples

There are several types of political consulting firms out there that provide a variety of services. It’s important that you know which of those services you need, because not every firm provides the same types of services. When deciding, you want to compare mail firms to mail firms, or media firms to media firms to get the best sense of services and costs. Be sure to ask potential firms if they specialize in any particular areas in addition to their basic services (e.g. specific issue areas, types of campaigns, types of clients, etc.). This will help narrow your search.
Do your due diligence

Once you’ve received proposals and narrowed your options, do your research. This means having a thorough conversation with the prospective hire. Make sure to ask for and check references. Current and prior clients will give you the best sense of how the firm operates. Are they responsive? Are they cost effective? Do they go above and beyond? What is their work style? Do you like the look and feel of the deliverables they’ve produced for past clients?

Determining the level of experience of a potential consultant is also critical. Have they managed campaigns or worked with campaigns similar to yours? You need someone who has a range of knowledge and experience that they can apply to your campaign and then figure out how to help you win.

Finally, remain realistic. In the end, all political consulting firms have to make a profit. If you are spending less than $25,000 in total on your campaign, it is likely more cost effective for you to do the work yourself. You can save 30 percent or more by doing work in-house, although you will likely sacrifice quality.

Meeting with a Political Consulting Firm

When first meeting with a prospective consulting firm, consider the following:

Ask questions

Ask questions about what the firm is telling you. Feel free to ask what items cost, and what is a smart, tactical fit for your specific campaign. A good political consultant will tell you that one size does not fit all. Not every technology and service they offer is going to work for your particular race.

If something seems too good to be true, it probably is

Campaigns are a tough business. If a political consultant tells you that they can win your campaign with a silver bullet, be very cautious. Be wary of political consultants who over-promise and set seemingly unrealistic deadlines. Due diligence and asking questions may save you from hiring a political consultant who is not going to be a good fit for your campaign.
Beware of flattery

When meeting with political consulting firms, you should beware of the flatterers. This is usually an indication that the consultant is not going to be up front with you and provide you with the advice you need to hear.

Work within your budget, and be wary of percentages

Money is a precious resource, and while political consultants can be of significant value, they need to fit within the confines of your budget. At least 70 percent of your campaign budget should be spent on direct voter contact, so if a consultant’s fees eat into your voter contact resources, you should consider hiring someone else.

In addition, carefully evaluate political consultants who work on a percentage basis. In your initial meetings, don’t be afraid to try and negotiate a flat fee. Many consultants will be open to working on a flat fee, which will help keep your campaign’s budget more manageable. If you do decide to move forward on a percentage-based payment system, make sure you understand the exact terms. For example, for a fundraising consultant, do they make a percentage of everything raised or only the money that they raise?

Opposition Researchers

Opposition research, or “oppo” for short, is an incredible resource for any campaign. Opposition research firms specialize in finding things about people that a simple Google search would not turn up. (Though they definitely get details on all Google-able offenses, too) Opposition research firms subscribe to more advanced search engines; regularly compiling government documents using FOIA (Freedom of Information Act) requests to look for homeownership, tax documents, arrest records and other legal documents. Opposition research firms know if your opponent has lied about their primary residence in just a few keystrokes.

Opposition researchers are not PI’s or police detectives, digging up gritty details on your opponent. Great opposition research political consulting firms will turn up information you didn’t know about your opponent that is provable, germane to the campaign and creates contrast for voters.

There are two different kinds of bad opposition research political consulting
firms. First, those who make wild accusations without the proof to back it up. You may have heard that your opponent doesn’t pay his or her taxes, but unless your opposition research team can dig up an IRS audit, summons, conviction or lien, don’t use it. Don’t let an opposition research firm tell you that you can use it because “they’re just waiting on the proof.” Second, bad opposition research political consulting firms won’t have the bandwidth to perform specialized research. Whether they let their Lexus Nexus subscription lapse or have never heard of FOIA, they don’t give you anything that you couldn’t get on your own, all while charging you through the nose. Bottom line: If you don’t see the proof, or if something seems too good to be true, tread very carefully and consider using a different firm.

Sometimes opposition research political consulting firms don’t turn up anything in their searches. It’s rare, but possible. You might have a squeaky clean opponent, or one that’s really good at hiding stuff. Regardless, it’s worth the investment to hire professionals to make that determination for you, and to know that you have all the tools at your disposal to create good contrast in order to win your campaign.
CHAPTER SIX

General Recommendations

Streamline Your Decision-Making Process

Many decisions need to be made at the start of a campaign. But this process, even for simple matters, can quickly become arduous. That’s why you need a strategy for making decisions as part of your campaign management plan. The sooner you set up systems for decision-making, the better.

Simply put, you need a protocol that details who makes what decisions, and when do they need to be made. One way to implement this strategy is to embrace organization. Utilize online calendars and mark deadlines (e.g. filing for office, fundraising quarters), campaign events (e.g. fundraisers, canvasses, community events), and milestones (e.g. 100 days left, start of GOTV, etc.) that everyone can access. This calendar should be a living, breathing document separate from the candidate’s schedule, though some events will overlap.

Once you have all the information in front of you, the timeline becomes clearer. You can then begin to back out the calendar so that you are mindful and attending to all the tasks that need to be done and decisions that need to be made. The calendar reflects what is going on and what is needed going forward.

As your campaign grows, continue to share the calendar with key team members. Staff should also help you manage the decision-making process. Deputize trusted members of your team to make smaller decisions, leaving the bigger decisions to...
you and your campaign manager. Sharing the decision-making process can feel unnatural and is not right for all types of decisions, but ultimately it helps to evenly distribute workload and ensure you have the benefits of other people’s experience, skill, and wisdom.

Prioritizing Your Tasks

Political campaigns require many long, grueling hours of work. Both the candidate and campaign staff will have many obligations throughout the campaign and will need to balance many different deadlines and commitments. That’s why it’s important that everyone on a campaign can prioritize their tasks to ensure that the most important tasks get done and there is not unnecessary duplication.

In order to prioritize your campaign’s tasks, there are two general guiding principals. In general, the candidate should be focused on activities that earn votes and raise money. Campaign staff — in particular the campaign manager — should be responsible for supporting the candidate’s activities and making decisions about all the elements of a campaign that don’t contribute to the pursuit of votes and money.

Not every task can be easily defined within these overarching principals, and there will inevitably be times in which, for instance, the candidate will want to have input on the headline of a piece of direct mail. But at the end of the day, the campaign that has contacted enough voters and raised enough money will win. Using these two guiding principals and keeping the candidate and campaign staff on task will help prioritize tasks and make sure that everyone’s focus remains on items that will help the campaign be successful.

Evaluating Success

At the outset of any campaign, it is important to set goals and determine metrics for measuring your success so that you can run an efficient, goal-oriented operation. Simply asking “Did it work?” or “Did we win?” aren’t meaningful ways to assess your campaign strategy. Set realistic goals and measure your progress throughout the campaign so you understand what works and what doesn’t.

Be strategic about primary and secondary goals. For instance, perhaps a fundraising event did not raise as much money as you hoped, but it did garner significant publicity and new supporters who will come to the next event.
If the primary goal was to raise money, perhaps you should look into other fundraising strategies. But you may want to continue to host low-cost events in the future to secure the secondary goal of growing the campaign’s public profile and community support. Splitting goals and having different definitions of success gives you a more accurate picture of your strengths and weaknesses. You will gain a better understanding of what to do differently so you do better in the future.

The Importance of Proofreading All Campaign Materials

Grammatical errors in campaign materials aren’t just embarrassing, they can turn into a negative story. Take this example: a direct mail piece goes out touting a candidate’s record as a “pubic” schoolteacher. These instances present opportunities for the press or local bloggers to eviscerate the campaign or the candidate, both as a potential elected official and as a teacher. The line of reasoning could be that if this candidate can’t get the spelling right in a mail piece, how could they legislate? That argument is extreme, of course, but not totally unfair given the nature of this egregious error.

We trust public officials to make important decisions. We want them to be precise and detail-oriented. Presenting voters with less than perfectly proofed materials is unacceptable. Setting up a few systems to protect against typos and other errors will help you to produce error-free materials from day one to E-Day. Here are a few tips to get you started:

At least two people should review everything that leaves the office

From email blasts to sign up sheets, three pairs of eyes (the author and two additional) should see every piece of material before it goes public.
Hire professional proofreaders

If you are working alone or with a skeletal staff, find an outside firm, like Bulletproof, to proof your work and catch any embarrassing errors.

Eliminate distractions while proofreading

Give the materials your undivided attention. Remove your headphones. Find a quiet place to sit and briefly ignore your email. The more you can focus on the task, the more likely you are to catch potential errors.

Look at the big stuff first

Read headlines, titles, vote dates and website addresses before tackling the body of the document. This will help ensure you don’t have any mistakes that are especially visible.
We hope you enjoyed our third e-book, *Are You Ready to Run?* In this book, we covered the tools, strategies, and tactics that any potential candidate for office should consider before you launch a campaign. This e-book is the first in a two part series for potential candidates. Once you’ve taken a close look at your race and decided to move forward, you’ll be ready for the second e-book, *Planning a Winning Campaign.* There, we’ll dive into strategy and communication basics that will help get your campaign off the ground and set you up to win. We’ll be launching this e-book this fall, so be on the lookout!

Thanks for reading,

The TCW Team