Campaign Skills Handbook

Module 9

Campaign Planning

Setting Goals, Outlining Strategies and Defining Tasks

المدارس الإقليمية لتنظيم الحملات

CAMPAIGN SCHOOLS

NATIONAL DEMOCRATIC INSTITUTE

Introduction

As soon as you make the decision to run for office, the campaign planning phase begins. The campaign plan is a strategic document that details each step of the campaign and how it will be implemented.

In an electoral campaign, the planning process is as important as the plan itself. A strong process allows you to think through each element of the campaign, what resources you will need, what obstacles you will face, and what activities you will engage in on a daily basis to achieve your goals. Anticipating each of these elements in advance creates a strategic advantage and means that your campaign will be in a better position to maximize available resources and manage any surprises that come up along the way.

Topics covered in this module include:

1. Campaign Planning
2. Setting a Goal
3. Budgets and Financial Resource Management
4. Timeline and Time Management
5. Data and List Management
6. Staffing and Human Resource Management
7. Volunteer Recruitment and Management

Campaign Planning

A campaign plan is a written document that charts what you are going to achieve in your electoral campaign and how you are going achieve it. It is a roadmap that will guide you and your team through the busy and challenging days of the campaign and election, help make sure you have all the resources you need and ensure you are conducting the types of activities that will get you to your goal.

No plan is set in stone; a strong plan is one that is regularly updated, assessed and redrawn based on the factors, challenges, opportunities, information and resources that arise in an electoral campaign, often unforeseen.

A plan is therefore a flexible document and can take on any shape or format that best fits your campaign. However, there is one rule that cannot be broken when it comes to developing a campaign plan: ***a plan is not a plan unless it is written down.***

If a plan exists only in your head as ideas or thoughts, then it doesn't really exist. If it has not been written down on a page somewhere, then it cannot come to life. If it cannot be shared with other team members, then it cannot be implemented. If it cannot be referred to in times of crisis, then it cannot guide your efforts.

Remember, every campaign essentially has four main resources. These are:

People

Time

Money

Information

Campaign planning is about managing all of these effectively so that no matter how resource-rich or resource-poor your campaign is, you can maximize your impact and potential to win.

There are many ways to construct a campaign plan, and how you do this in practice should reflect your own needs and assets, the type of election you are facing and what the election law allows. However, the following elements should be considered and

included within this context, and should work together as the building blocks that get you to your goal:

- Goal: Your campaign goal is a clear statement of what you want to achieve. Do you need to "top the poll," i.e., receive more votes than any other candidate on the ballot? Do you want to increase your party's support in the area by 5%? Are you running for better name recognition in this race, with the goal of winning a seat in the next election? Your goal should be a short, well-defined declaration of what you realistically want to accomplish.

- Timeline and Action Plan: The timeline and action plan outline what you are going to do on a daily basis and measure out how much time you will need to implement all your activities and the components of your campaign.

- Budget and Fundraising: Your budget clearly outlines how much money or other material resources you will need to implement the campaign. The fundraising component maps out how you are going to find them.

- Message: Your message is your statement of purpose that communicates to voters who you are, what you stand for, and what makes you different from other candidates in the race. The message elements of your plan define this statement and lay out how and when you will communicate your message.

- Media and Communication: This is your external communication strategy that defines how you will use conventional and newer media to communicate with voters and raise your profile.

- Campaign Team: How many people do you need? What will their roles be? Can you afford paid staff or will you have to recruit volunteers? How big will your team need to be? The campaign team element of your plan answers these questions so that you have the right human resources to implement your strategy effectively.

- Voter Contact: Your voter contact strategy calculates how many votes you will need to win or reach your goal, where you can find those votes and how you will communicate directly with supporters and potential supporters, and ensure they will cast their ballots on election day.

A number of these elements are fully developed in other modules from NDI's MENA Campaign Schools Curriculum including message, media and communication, voter contact and fundraising. This module focuses on the remaining elements of the planning process, including timelines and action plans, budgeting, and staffing.

Setting a Goal

Every election is different, every candidate is unique and every electoral campaign has distinctive opportunities and challenges. Whatever the obstacles to victory might be, each candidate should enter the race with the intention to do their very best, to communicate effectively with voters and to win.

Sometimes, however, there is more to an election than simply winning. Sometimes, you need to think about building up your party's base of support in an area. Sometimes, you need to work towards enhancing your own name recognition or contacts within the community. Sometimes, you need to solidify support from new or first-time voters to the party. And sometimes, you are running to put forward a specific issue or set of issues.

Your campaign goal outlines what the days after the election will look like for you and your campaign team, once all the votes have been counted. After all your hard work, what specifically will you have achieved?

Consider the following examples of campaign goals:

- To win two more parliamentary seats in this district by picking up the largest percentage of first-time and swing voters
- To obtain the highest number of individual votes as a candidate on my party's list (in the open list system) in this district
- To increase my party's support in the area by 3%, enough to be one of the parties in government in the regional assembly
- To get elected to the local council this year and to raise my profile enough that I will be selected as mayor within the next four years

Activity 1: Setting a Goal

Imagine the days shortly after the next election. The results are in and have been announced. What does it look like for you as a candidate and your campaign team?

Use this mental image to write down your goal for the next election and define what it is that you want to achieve.

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Budgets and Financial Resource Management

Some campaigns have an extraordinary amount of resources. Others manage on very little. First-time or challenger (as opposed to incumbent) candidates typically fall in the latter category.

Whatever your situation is, your campaign needs a budget. A budget will allow you to plan in advance how much the campaign is going to cost, and anticipate when you are going to need the most resources and how you are going to manage funds.

Budgets don't have to be complex, but they do have to be accurate. It is important to put as much research into your budget as possible so that you're not simply guessing how much your printing costs will be, for example, only to discover that they are actually three times more expensive than you estimated. Research can be as simple as making a few calls to vendors to ask for early quotes or, if local businesses operate this way, going online to see what typical rates are for some of the services you'll need.

A large part of what you are trying to track in your budget is cash flow. Campaigns typically need more cash at the beginning to get started and then again at the end of the campaign period to finish strong and get out their vote. Use your budget to track when you can expect to get income in to pay bills and when you will have to be particularly careful with spending to preserve resources.

Consider the sample campaign budget below from a fairly simple local election campaign. Follow the flow of cash in and out of the campaign and note when large bills and expenditures are expected.

Sample Campaign Budget

	Month 1	Month 2	Month 3	Month 4	Month 5 (Election)
EXPENSES (MONEY OUT)					
Office					
Phones	400	300	400	800	1000
Phone deposit	2000				
Supplies (paper, pens, etc.)	100	100	100	200	300
Postage	50	50	50	150	350
Volunteer expenses	100	100	200	300	500
Printing/Photocopying					
Flyers/Leaflets	150		150	250	500
Paraphernalia (buttons, stickers, signs, etc.)				500	
Fundraising					
Events	1500		800	200	1000
Meetings		200	200		500
Voter Contact					
Voter List	400				
Canvassing		250	250	500	1000
Community Meetings	200	200	200		
GOTV					2000
Media & Communication					
Radio Ads					1000
Billboards					1000
Website	250	250	250	250	250
Press Events	200	200	200	400	1000
REVENUE (MONEY IN)					
Contributions					
Candidates	1000	1000			1000
Political Party	5000				2500

High Donors				2000	4500
Medium Donors				1000	1000
Low Donors	500	500	250	500	500
Total Expenses	**5350**	**1650**	**2800**	**3550**	**10400**
Total Income	**6500**	**1500**	**250**	**5500**	**10500**
Cash Flow	**1150**	**(-150)**	**(-2550)**	**1950**	**100**
Cash-On-Hand	**1150**	**1000**	**(-1550)**	**400**	**500**

Activity 2: Building a Budget

The sample budget on the next page outlines basic budget line items for a six month campaign. Review the categories covered and consider what you will need for your own campaign based on the strategic planning you have conducted already as part of the Regional Campaign Schools program and your own experience. Edit the document to remove items which will not be relevant to your campaign and to add items that you will need to pay for which are not already listed.

Please note that in budgeting, some costs will fall into more than one line item. For example, the costs of phones and phone cards will affect all activities including fundraising, communication and voter contact. Purchasing and formatting the voter list, or building a voter database, will impact all voter contact and GOTV expenses. Use specific line items (such as phones or voter list) to estimate the exact cost of these expenses, and use broader categories (such as canvassing and GOTV) to estimate the additional costs of conducting these activities.

Sample Campaign Budget

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6 (Election Day)
EXPENSES – INCOME OUT						
Office						
Phones						
Phone cards						
Supplies (paper, pens, etc.)						
Computers						
Printers						
Toner						
Internet Access						
Coffee/Tea						
Printing/Photocopying						
Flyers/Leaflets						
Paraphernalia (buttons, stickers, signs, etc.)						
Invitations						
Photocopies						
Fundraising						
Events						
Meetings						
Voter Contact						
Voter List						
Canvassing						
Community Meetings						
GOTV						
Media & Communication						
Radio Ads						
Billboards						
Website						

Press Events						
REVENUE – INCOME IN						
Contributions						
Candidates						
Political Party						
High Donors						
Medium Donors						
Low Donors						
Total Expenses						
Total Income						
Cash Flow						
Cash On-Hand						

Timeline and Time Management

Electoral campaigns are exciting, energizing and extremely demanding. A well-run campaign requires a detailed timeline to help you think through everything the campaign needs to complete during the official campaign and pre-campaign periods, and when it needs to be accomplished. A strong timeline will ensure that you are maximizing time as a resource and not wasting precious moments engaging in activities that don't get you to your goal.

The best way to write a timeline is to start from the goal you defined for election day in the first section of this module and work backwards, detailing all the steps you will have to take in order to make it to this goal.

In order to actually be implemented and to ensure you have the resources you need to complete each task, each activity on your timeline should be assigned a responsible person and the necessary human resources (volunteers) and material resources.

On the next page is the timeline from the final days of an election campaign for parliament with open party lists, so the effort focused not only on the party but on raising the profile of an individual candidate as well. Review the timeline and consider your impression of how useful it might have been in organizing the campaign's last week of activities.

Date	Activity	Responsible Person(s)	Resources Needed
After Election Day	Finalize all administrative tasks, pay workers	Campaign Manager, Office Manager, Finance Director	Money
	Appreciation party for workers, volunteers and supporters	Campaign Team	Venue, food, small gifts
Election Day	GOTV – door-to-door	Campaign Manager and Field Director – identify target areas Database Manager – produce lists of target voters Volunteer Coordinator – recruit volunteers to prepare GOTV materials and conduct GOTV	GOTV leaflet Script for volunteers Lists of target voters or areas Maps of areas to be covered Badges or stickers with campaign logo 200 Volunteers
	GOTV – phone calls and SMS	Campaign Manager and Field Director – identify target calls and write script Database Manager – produce lists of target voters Volunteer Coordinator – recruit volunteers to make calls	Script for phone calls Call lists 80 Volunteers (on a rotation)

	Observation at polls and vote count	Campaign Manager and Field Director – identify key polls and counting centers Volunteer Coordinator – recruit and train volunteers in observation skills	Observation check list 50 Volunteers
	Candidate Press Events	Campaign Manager and Press Officer – define press strategy for the day and arrange press events Candidate	Press packets Election day speech for candidate
Election Day minus 1	Voter Contact – door-to-door in last 1/3 of B and C areas	Field Director and Volunteer Coordinator	Persuasion leaflet 150 Volunteers
	Candidate Visits – candidate visits key community leaders to solidify their endorsements and ask them to mobilize their supporters to vote	Candidate and Campaign Manager	Small thank you gifts for community leaders
	Candidate Press Events	Candidate and Press Officer	Press packets Speech or talking points for candidate

Election Day minus 2	Voter Contact – door-to-door in middle 1/3 of B and C areas	Campaign Manager and Field Director – identify target areas Database Manager – produce lists of target voters Volunteer Coordinator – recruit volunteers to conduct door-to-door contact	Door-to-door leaflet Script for volunteers Lists of target voters or areas Maps of areas to be canvassed Voter contact cards Badges or stickers with campaign logo 100 Volunteers
	Rally in town center – large event to mobilize A voters and supporters and raise candidate profile coming up to election day	Campaign Manager Field Director Volunteer Coordinator Press Officer Candidate	Notices/invitations to supporters to attend (send out 10 days before) Banner and podium sign for stage Balloons, bunting, decorations Band or music Speech for candidate (focus on message and motivating supporters)

	Outreach Tents – set up tents in key areas and invite local residents to come and meet the candidate; offer refreshments/ hospitality	Field Director Volunteer Coordinator Candidate	Mobile tent Campaign literature Voter contact cards Sweets and drinks 10 Volunteers
Election Day minus 3	Voter Contact – door-to-door in first 1/3 of B and C areas	Campaign Manager and Field Director – identify target areas Database Manager – produce lists of target voters Volunteer Coordinator – recruit volunteers to conduct door-to-door	Door-to-door leaflet Script for volunteers Lists of target voters or areas Maps of areas to be canvassed Voter contact cards Badges or stickers with campaign logo 100 Volunteers

	Outreach Tents – set up tents in key areas and invite local residents to come and meet the candidate; offer refreshments/ hospitality	Campaign Manager and Field Director – identify key areas to set up outreach tents Volunteer Coordinator – recruit volunteers to assist Candidate	Mobile tent Campaign literature Voter contact cards Sweets and drinks 10 Volunteers
	Candidate Press Events	Press Officer – organize all press events Candidate	Press packets Speech or talking points for candidate
Election Day minus 4	Newspaper Ads – print final newspaper ads before election day targeting B and C voters	Campaign Manager and Candidate – shape message for advertisements Press Officer – help shape message and organizes the ads	Money
	Facebook Campaign – use Facebook and other social media to begin to mobilize supporters to vote	New Media Officer and Press Officer	Computers

	Outreach Tents – set up tents in key areas and invite local residents to come and meet the candidate; offer refreshments/ hospitality	Campaign Manager and Field Director – identify key areas to set up outreach tents Volunteer Coordinator – recruit volunteers to assist Candidate	Mobile tent Campaign literature Voter contact cards Sweets and drinks 10 Volunteers
	Candidate Press Events – focus on contrast with competitor	Press Officer Candidate	Press packets Speech or talking points for candidate
Election Day minus 5	Voter Contact – mailing to B and C voters (use door-to-door literature drop if mail system not functioning this week)	Campaign Manager and Field Director – identify target areas or voters Database Manager – produce contact lists of target voters or areas Volunteer Coordinator – recruit volunteers to prepare mailing	Letter, leaflet or materials to be mailed Contact lists Envelopes and stamps 50 Volunteers
	Fundraising Event – gala evening at home of strong supporter	Fundraiser – organize fundraising event and recruit potential donors Candidate	Campaign literature Forms for legally registering political donations Small thank you gift for host

	Candidate Press Events	Press Officer – organize all press events Candidate	Press packets Speech or talking points for candidate

The sample timeline lays out a very busy final few days for this campaign, but organizing activities in a central plan like this helps the campaign manager and other campaign team members make sure that everything is getting done well and on time.

A blank timeline is included on the next pages for a 15 day electoral campaign and a 10 week pre-campaign period. Use this model to work through activity planning for your own campaign. You will have to adjust it to accommodate the precise legal campaign period for the election on which you are working, and the appropriate pre-campaign period. If this is your first election, for example, you may want to write a timeline for a much longer pre-campaign period to fully prepare, even up to a year.

Activity 3: Timeline

Use the sample campaign timeline on the next pages to think through everything you will have to accomplish during the next electoral campaign, and to fully prepare for the campaign. Adjust the timing to accommodate the legal campaign period for the election on which you are working. Add more time for the pre-campaign period if you need longer to prepare.

In the sample timeline, the amount of space for each period of time is relatively limited for the ease of fitting it into this manual. Please do not hesitate to add more space on separate pages so that you can add more detail and more activities. The more detail you add, the more prepared you and your campaign team will be.

Sample Campaign Timeline

Date	Activity	Who's Responsible?	Volunteers Needed? How Many?	Other Resources? Money, Leaflets, Banners, Food, etc.
Election Day				
Official Campaign Day 15				
Official Campaign Day 14				
Official Campaign Day 13				
Official Campaign Day 12				

Official Campaign Day 11				
Official Campaign Day 10				
Official Campaign Day 9				
Official Campaign Day 8				
Official Campaign Day 7				
Official Campaign Day 6				

Official Campaign Day 5				
Official Campaign Day 4				
Official Campaign Day 3				
Official Campaign Day 2				
Official Campaign Day 1				
One Week Before Campaign				

Two Weeks Before Campaign				
Three Weeks Before Campaign				
Four Weeks Before Campaign				
Five Weeks Before Campaign				
Six Weeks Before Campaign				
Seven Weeks Before Campaign				

Eight Weeks Before Campaign				
Nine Weeks Before Campaign				
Ten Weeks Before Campaign				

Data and List Management

One of the most commonly used tools in every campaign's toolbox is lists: lists of supporters, lists of potential donors, lists of volunteers, lists of community leaders, lists of press contacts, lists of persuadable voters, lists of opinion leaders, etc.

Lists are the lifeblood of every campaign, providing vital information of where and how to grow support. While long and abundant lists can make a campaign feel rich with information, a list is only as good as the quality of the data it includes. If half of the people on your list of persuadable voters are deceased and there is no contact information for the other half, then that list is of little value to your campaign.

Lists come from a number of sources:

1. **The official voter list**
   The official voter list should provide your campaign with the names and some form of demographic data (general age, gender, etc.) and/or contact information for every registered voter. Most campaigns try to build their core database from the official voter list, if it is reliable and if they can get it in electronic form. Even campaigns that can't get an electronic version of the list will use a hard copy to guide their voter contact efforts.

2. **Contact lists from candidates**
   Every candidate for public office has a network of family, friends and professional colleagues. These are important to add to a campaign's outreach efforts because these people typically have an interest in the candidate or campaign doing well and may be able to help in any number of ways from offering public endorsements, to hosting fundraising events, to canvassing support in their local area.

3. **Contact lists from supporters**
   Supporters of the political party or candidate may also be able to provide lists of contacts from their personal and professional networks, which the campaign can use for fundraising, voter contact and press events. These supporters can either be individuals who provide their personal lists or organizations which provide lists of their members or professional contacts.

4. **Contact management companies or software packages**
   There are a number of companies which provide data and contact management systems and software. Some of these are based on voter lists, while others are sourced from commercial enterprises such as marketing campaigns. These

products and services can be extremely useful to campaigns, but they can also be expensive. If your campaign is going to invest in one of these, do plenty of research on whether the company can provide you with exactly the type of product you need for the type of campaign you are going to conduct, and what type of assistance or support they will offer throughout the campaign to ensure the product is performing well.

5. Campaigns build their own

Some campaigns – particularly those with sufficient time and volunteers – build their own database systems from the ground up, collecting information through their voter contact efforts. Campaigns that do this typically arrange highly systematic and well-organized efforts to gather voter details, often through door-to-door canvassing.

These types of efforts require careful planning and thinking through the types of data that need to be collected and the best way to gather this information, particularly if there is a chance that asking for personal details could make some voters uncomfortable. One campaign in a country undergoing a significant political transition, for example, organized a large prize draw and asked people to share their contact information in exchange for putting their names in the competition to win.

However you build your lists, how you manage your data is vital to protect the quality of the information. Every year, thousands of people die, move home, marry and even change political allegiances. Your data management system has to keep up with this.

The ultimate objective is to come up with a system that allows you to query your data by a variety of criteria: family name, polling station, voting history, gender, donor history, etc. As such, you will need to separate your data into a variety of fields so that each can be queried separately. Typical fields in a campaign database include:

Family Name	
First Name	
Salutation/How to Address Them	What should your candidate, party officials or anyone from the campaign call this person when contacting them?
Gender	Male or Female?
Contact Phone	If people are likely to have several phone numbers (e.g., a home, work and mobile phone, or several mobile phones) create separate fields for each, ranking them according to which is the best or most appropriate one to reach them on.
Contact Email	Collect this information even if email is relatively new or only used by a small population. It is likely to grow in the future.
Contact Address	Collect this information so you know where to visit them for direct voter contact, and so you can contact them by mail if there is a postal system. If there is no system of addresses in the area, describe how to find their residence or place of work so that volunteers could find it.
Postal Code	If there is a functioning postal system, collecting postal codes can be very useful for organizing voters into manageable geographical areas.
Polling District or Station	Where do they actually vote? This is very important information for organizing voter contact and Get Out the Vote (GOTV) efforts.
Party Affiliation	Are they a member or active supporters of a political party?
Voting Intention	Who are they planning to vote for in the upcoming election? Use a grading system to mark who they are likely to support (see the Voter Contact Card in Module 4 for an example).
Voting History	For longer-term purposes, it can be very useful to track whether or not this person actually voted in an election. This will help make sure your future efforts focus on likely voters.
Donor History	Have they contributed financial or material resources to your campaign or other campaigns? Do they have the potential to become a donor?
Volunteer History	Have they helped out in your campaign or other campaigns, or are they likely to volunteer for you if asked?
Priority Issues	What issues are they saying are important?
Date of Birth or Age Range	

If you're going to go to all the trouble to create a strong database for your campaign, it is very important that you take good care of it. Remember, a database is only as good as the quality of data it contains. Rules for good database management include:

1. **Keep it in one place**
   If your database is kept on more than one computer and more than one person can access it at a time, there's a pretty good chance that you'll end up with a jumble of mixed-up data in no time. Keep the database in one place, password protected, and only let specific people add or change data so that the manner in which it is entered remains consistent.

2. **Keep it clean**
   As mentioned earlier, change is a common occurrence in life and the data in your system will have to keep up with the changes in peoples' lives. Ensure that whenever your campaign talks to voters or communicates with them directly, volunteers have a mechanism to bring back information on changes in voters' contact details (see sample Voter Contact Card in Module 4, for example). If the mail or public records systems are reliable, use updates from these agencies on changes of address or residents who have been registered as deceased. Make updates to the database regularly.

3. **Build for flexibility**
   At the beginning of a campaign, you may think that you'll only need one type of list: voters to contact for persuasion and GOTV. As the campaign progresses, suddenly you discover that you need to know more about people's voting history, or the issues they identify as important. It is essential to construct your database in a way that is highly flexible so you can run any number of different reports. This typically means separating data into as many separate fields as possible so that you can view the information in a lot of ways.

4. **Back it up**
   Campaigns are busy places and sometimes amidst the chaos we forget to complete obvious tasks – like backing up our databases. Backing up a database essentially means making a copy of it on compact disc, on an external hard drive or on an internet server in case the campaign's computer system fails. Campaigns should aim to back up their data daily so that vital information is not lost. If the file is massive and backups are cumbersome, look to back up files weekly or every other day.

Staffing and Human Resource Management

As important as how you manage your time and material resources are the people you recruit to bring energy, ability and focus to your campaign. This is your campaign team, which can consist of both paid (staff) and unpaid (volunteers) members, depending on what you can afford and what you want to achieve.

Every campaign team is different, depending on the party's electoral ambitions and the local political landscape. Rural districts, for example, often require a talented Field Organizer, dedicated Volunteer Coordinator, and numerous volunteers to reach voters in a large geographical area. Campaigns in more urban areas are more likely to use electronic and print communications to contact voters and may therefore bring in a Communications Officer first.

Whatever your campaign team looks like, it is important that all key roles are filled, that they are filled by individuals who will take responsibility for their work, and that everyone has a clear job description and knows what his or her responsibilities are.

Below are the general steps for organizing campaign teams:

Use the questions and instructions below to help you walk through each of the steps to organizing a campaign team.

Ask yourself. . .	Do this. . .
What are the activities and programs included in the campaign?	Review your communication plan, voter contact plan and timeline to identify all the activities you need to accomplish.
What are the skills required to implement these activities?	Identify the skills required to achieve what you have set out in your planning.
What are functions necessary for the success of the campaign?	Write job descriptions that tie skills and responsibilities to specific positions within the campaign.
Where can I find the right people for my team?	Recruit staff and volunteers, based on the skills you need and the job descriptions you have written.
Who is going to be responsible for what?	Assign specific roles to team members and volunteers

Campaign Team Job Descriptions

Accurate job descriptions are important for any work situation, but they are particularly important in electoral campaigns. Campaigns can be chaotic environments and good job descriptions help to keep everyone focused on what needs to be accomplished and makes it clear who is responsible for what.

Who you need on your team will depend on what you need to achieve and what resources you have to pay staff. Below is a list of typical roles and responsibilities within a campaign team. Review this list and consider what team members you would need for your campaign based on the planning you have already done. Keep in mind that any of these positions can be either paid or unpaid, depending on your resources.

Campaign Manager the Campaign Manager oversees the implementation of the campaign plan, ensures that all activities run smoothly on a daily basis, and that the campaign is achieving its goals; the Campaign Manager also makes sure the candidate or candidates are holding up under the strain and demands of the campaign

Field Organizer the Field Organizer plans, organizes and implements the party's voter outreach activities, including everything from rallies to canvassing

Communications Officer the Communications Officer oversees all external communications and may also be responsible for media relations and the media strategy if there is not a Press Officer

Volunteer Coordinator	the Volunteer Coordinator recruits and manages all volunteers, as well as makes sure they have all the information they need to do a good job and feel like they are part of the team
Fundraiser	the Fundraiser raises financial and other material resources for the campaign (such as donated office supplies, food, computer equipment, office space, etc.) within the limits of campaign and political finance and spending regulations
Press Officer	the Press Officer writes the media strategy for the campaign (often in collaboration with the Campaign Manager and the party's central press office), handles all media relations, organizes press events and builds relationships with journalists to help boost the party's local press coverage
Researcher	Researchers help collect information that the party will use in its campaign materials and strategies, such as information on policy issues or data on priorities among the voters
Technology Officer	the Technology Officer ensures that the campaign has access to whatever forms of technology is needed to implement the campaign plan, including mobile phones, computers, internet access, database software, etc.
New Media Officer	the New Media Officer handles outreach to newer forms of media, such as Twitter, Facebook, Internet video messages, etc., as well as managing various forms of electronic communication, such as SMS, emails, designated websites, etc.
Office Manager	the Office Manager runs the campaign office, including answering phones, setting up meetings, ensuring there are adequate supplies, updating calendars, etc.
Database Manager	the Database Manager sets up and maintains the campaign's voter list, including regularly inputting the results of voter contact activities, working with the field organizer to target likely supporters, and pulling lists of targeted voters for campaign volunteers to contact.

Activity 4: Staffing

1. Review the timeline you constructed in the previous section of this module. If you have also completed the communications and voter contact plans in previous modules, review these as well. Based on the activities you have outlined in your planning, what are the skills that you will need members of your campaign team to have?

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2. Review the Campaign Team Job Descriptions above. How many of these functions will you need to fill on your campaign team? What changes, if any, would you make to these job descriptions to fit your campaign environment? What job descriptions would you add? Consider these questions, then write down below all of the jobs that you will need to fill on your campaign team.

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Volunteer Recruitment and Management

Volunteers are amazing. They provide resources a political party or campaign could never afford to pay for on its own. They can bring vitality and energy and a renewed sense of dedication to a political party's work. They also bring legitimacy to a campaign by demonstrating genuine grassroots support and provide it with momentum. The more volunteers a campaign attracts, the more attractive it is to voters.

Volunteerism can be defined as an activity to:

- Benefit the community and others
- Participate in activities within one's community

Volunteerism is:

- Done of one's own free will and is not forced
- Done without any financial compensation

Although they bring in free labor, volunteers also create demands on a campaign's administration and management structures. Volunteers need direction, support, meaningful tasks, and motivation and reward structures. Parties and campaigns which rely heavily on the contribution of volunteers should be prepared to treat them as a complex and important asset.

People volunteer for a variety of reasons, including:

- They believe in or are somehow connected to the issues or ideas the party or candidate represents.
- They are motivated by a desire to learn new skills or get work experience.
- They hope they will get a paid job from volunteering.
- Social reasons – to meet new people, to feel more connected to the community
- or to do something meaningful and enjoyable.
- They are seeking recognition and acknowledgement for their abilities.

It is important that campaigns keep these reasons in mind when seeking to maximize the opportunities that volunteers bring. As the reasons outlined above illustrate, this is a two-way relationship – volunteers may offer their labor and their energy without being paid, but that does not mean they do not want to be rewarded in other ways. Volunteers are typically seeking to get something out of the experience as well.

Where to Find the Best Volunteers

The best volunteers are those who can make a long-term and consistent commitment to your party or campaign. Although you will need some volunteers on a strictly ad hoc basis to help out with specific projects, the more consistently a volunteer works with your campaign the stronger their skill set will become and the more valuable the relationship becomes for you both.

Look for volunteers among:

1. Family and friends
2. Local schools and universities
3. Local civic or religious organizations
4. Supporters who can't give money

Use the voter contact efforts and events that the campaign is organizing as opportunities to recruit volunteers as well. Develop a small card where you can collect people's contact information, and bring those wherever you go. When you encounter someone who wants to get involved, use these to get their contact information and follow-up quickly. You can also use your campaign's website or Facebook page to recruit potential volunteers.

If it is appropriate, consider developing partnerships with local academic, civic or religious institutions. They may have members who are interested in politics and may be willing to commit to a fixed-term placement in exchange for learning a specific skill or having a certain professional experience.

Even if the campaign has one person dedicated to coordinating volunteers, every member of the campaign should use opportunities to recruit volunteers, and pass information about potential volunteers to the coordinator.

Managing Volunteers

Volunteers can be an important asset and should be approached as such. The more dedicated a campaign or political party is to the care and management of volunteers, the better the relationship will be and the more both the party and the volunteer will benefit. Consider the following guidelines:

1. **Establish standards for volunteering.** Ask for a minimum commitment in terms of number of hours or days of the week a volunteer will work for the organization.

Establish a work agreement based on mutual needs and expect both parties to stick to this agreement.

2. **Create structures within the party or campaign to support volunteers.** Ensure volunteers know to whom they are reporting and to whom they are responsible, who to go to get their next assignment and who to speak with if there is a problem. This can be done either by assigning a Volunteer Coordinator within the organization or assigning each volunteer to a specific manager.

3. **Monitor progress and reassign if necessary.** If a volunteer is enthusiastic but not thriving at the tasks she or he has been assigned, consider moving them to another project where they may have more interests or a better skills match.

4. **Keep standards high.** Don't accept subpar work simply because it came from a volunteer. Let them know your professional standards for the entire team and expect them to meet those as well. They'll benefit from learning new skills and the organization will get more from their participation.

5. **Provide training and support.** Ensure that you are not asking a volunteer to do something for which they have no background or training. Provide opportunities to learn new skills and to help them achieve the qualifications and experience they are seeking.

6. **Show appreciation.** In addition to thanking volunteers on a regular basis, there should be specific opportunities to show gratitude and publicly recognize their contribution. Take the time to get to know volunteers and find out why they have gotten involved.

7. Depending on the time commitment made, **volunteers can handle just about any project,** including:

Short-term projects	• Phone banks • Internet research • Mailings or leaflet drops • Updating website • Fundraising • Event organizing • Data entry • Providing food or refreshments to campaign workers

Regular or weekly projects	• Scheduling candidates or party officials • Press clips and blog monitoring • Updating social networking sites • Coordinating neighborhood meetings, canvasses or other voter contact activities • Event organizing • Thank you letters and other correspondence • Data entry
Permanent tasks	• Playing a key role as a member of the campaign team • Producing external communication pieces, such as newsletters or email updates • Research projects • Database management • Supporting the party board or executive committee

Why Volunteers Don't Join or Don't Stay

When volunteers fully commit and make an enthusiastic contribution to a campaign, it's largely because they are getting something that they value in return for their hard work. When volunteers leave or don't come back to a campaign or political party, this exchange of interests in not taking place. If a campaign is going to establish standards for volunteer participation, it also has to set standards for what it is offering volunteers. Some of the reasons volunteers don't stay are outlined below:

1. **Dirty facilities or no facilities.** One of the main reasons that volunteers quit is that basic human needs are not provided for. The toilets may be filthy, or there may be no toilets to use in the party or campaign headquarters. Simple things like facilities to make a decent cup of tea or have a break, make a difference to the willingness of volunteers to commit to longer spells of work.

2. **Lack of follow-up.** Someone offers to volunteer, comes in for a day and then they never hear from your campaign again. In addition to not coming back, they may not say very nice things about your party to friends and family. Following up and staying in touch with volunteers is very important.

3. **Insufficient appreciation or acknowledgement of their work.** No one likes to be taken for granted, especially when they're not getting paid. Make sure you say thank you and acknowledge the good things volunteers are delivering.

4. **They feel they are set up to fail.** Volunteers who are asked to do tasks for which they are not equipped, like maintain a website when they have never been on a computer before, feel that they are being set up to fail and often leave if they think they are being put in this position.

5. **No fun.** Who wants to go to work if it is never any fun, especially if you are not being paid? Working with your campaign doesn't have to be a festival, but it shouldn't be unpleasant either.

Activity 5: Recruiting Volunteers

1. Review the campaign timeline you constructed in the previous section. Based on your planned activities, how many volunteers will you need to recruit for the campaign?

_____

_____

_____

2. What activities will your volunteers be working on? What skills will you need your volunteers to have?

_____

_____

_____

3. Thinking about your local community and personal network, where do you think you will be able to recruit the best volunteers?

_____

_____

_____

4. What is your message to potential volunteers? Why do you think they should make a commitment to your campaign?

_____

_____

_____