



Chapter 1

Getting Started

So, You Want to Get Something Done?

Approach #1: The Patented “Cross Your Fingers and Hope” Method.

- How to get started: Sit, wait, and hope for the desired outcome. There are plenty of other people out there with experience at these kinds of things. Shake your head until they get it right. If you're especially active, you might holler and make some noise whenever it seems like it might be fun. The key tactic is to level plenty of criticism at national figures and make demands of them without doing anything locally.
- Likely result: You have no idea, but your opposition does. They will win. You will lose.

Approach #2: Get to Work: Research, Plan, and Organize.

- How to get started: Uncross your fingers. Do it now. Start planning. Now. Identify goals, develop a strategy, and engage in effective tactics to carry out your strategy. Victory is a specific goal and the plan to get there is quantified and written down. In elections, victory equals a specific number of votes – it has a number that is knowable months beforehand.
- Likely Result: Win or lose, you'll have become the agent of change. You'll have developed our organization, your candidate, and your district. You will show up. You will put up a fight.

**There is no magic.
There is work.**

"[T]he biggest lie told by people like me to people like you at election time is that, 'If you vote for me, I'm going to solve all your problems.' The truth is, the power to change this country is in your hands, not mine."

–Gov. Howard Dean

**If locals don't do it,
it won't get done.**

- Success CAN be imported, but it is very expensive, and it will not last.
- When locals are committed, success can happen without non-locals.
- Locals will always be more invested than non-locals.

DFA Training Academy has one overarching theme:

“WE are the ones we have been waiting for.”

–From the Hopi poem, “The Great River,”
Also attributed to an organizer in Jim Wallis' Politics of God

Stop Thinking You Are “Normal”

You’re not. You’re abnormal. You’re strange. You’re exceptional. Here’s why:

Remember: You are an exceptional person.

- You think about politics everyday.
- You understand that politics affects your everyday life.
- You see politics as a means to bring about positive change.
- You are partisan.
- You are reading a political training manual right now.

Remember: Most people are “normal.”

- They are skeptical of politics and politicians.
- They care about things that affect their everyday lives.
- They do not want to be told what to do or what is good for them.

Just who do you think you are?

58 % of Americans vote.

42% of Americans vote for offices other than President.

8% of Americans have volunteered for campaigns.

>1% of Americans donate to electoral campaigns.

The very act of coming to the DFA Training Academy or reading this manual sets you apart from the vast majority of Americans. Most Americans spend their time at work, with their family, running errands, and so on. Few would add responsibilities that put them at odds with nearly half of the rest of the country. Fewer still would do so if they knew they were going to lose much of the time.

When the “Exceptional” talk to the “Normal,” they must speak Normal.

Goals, Strategies, and Tactics

An understanding of the differences between your goal, your strategy, and your tactics will help you think about organizing and campaigning in a more effective manner.

Goal – The end result of your plan. The task you need to accomplish. No matter how broad or narrow the goal, it must be quantified, explicit, and specific. The goal of “Victory” actually might mean “Getting 21,415 votes for the candidate.”

Strategy – The means you will use to accomplish your goal. You will often be presented with many avenues you can use to reach your goal. You will make a decision on which of these avenues to take. Often multiple strategies can be used.

Tactic – The hand-on actions you take to carry out the strategy. This is what you would actually “Do.” Many tactics can be used to carry out a particular strategy.

Example

Goal: Persuade 1,214 undecided voters by end of month.

Strategy: Direct Voter Contact.

Tactic: Run a canvass operation.

Common pitfalls

All talk. No action. Some groups get stuck at the goal. They set lofty non-specific goals and can not come up with a plan to accomplish it.

Tactic Obsession. Some tactics are fun and visible. But how do they fit into your strategy? What do you get out of it? Some campaigns use tactics that do not result in any campaign product.

Timelines & Benchmarks

Knowing your goals and the strategies and tactics to achieve them is a start, but how will you be able to tell if they are working? In order to stay on track and be able to make important adjustments to your strategies and tactics, you'll need to break your goals down to specific benchmarks over a timeline.

Timelines – You only have so much time to achieve your stated goals. Writing out a detailed timeline of how you expect to meet those goals is crucial.

Benchmarks – Benchmarks should be specific and quantifiable. A benchmark is how you will measure your progress towards your goals. If you're meeting your benchmarks, you then know you're on the right track, if not, you will still have time to change your strategy or tactics before it's too late.

Example

Say you are a candidate for city council and have a Primary election coming up in September. There are 1214 voters in your district. What is going to be your plan to get their votes?

Your **Goal** is to knock on each door before the end of summer.

Your **Strategy** would be direct voter contact & persuasion.

Your **Tactic** to reach the voters is going to be canvassing them at their homes.

Your **Timeline** is April-August.

Your **Benchmarks** are broken down month by month to tell you if you're on track to meet your goal.

Month	April	May	June	July	August	Goal
Doors Canvassed	172	258	283	316	203	1214

The key distinction between a professional campaign and an amateur operation is their understanding of goals, strategies, tactics, timelines & benchmarks.

Campaign Resources

Campaigns always run in a condition of scarcity. You are constantly struggling to maximize the resources you have. You have three kinds of resources:

People • Money • Time

People – These are your staff and volunteers. You recruit and train people capable of carrying out your strategy and executing your tactics. This resource is maximized by recruitment and training.

Money – Everything costs money. In-kind donations are still donations, and as such, are limited. Everyone must know how this resource works. This resource is maximized by fundraising and budgetary discipline.

Time – You have much to do, but there are only 24 hours in a day. Choose wisely because you can never get that time back. You can never get more time. You can only maximize this resource by planning well.

Resource Management:

“Some” is not a number.

“Soon” is not a time.

Approximations have no place in campaigns. The management of limited resources requires you to deal in specifics. Round numbers are lazy lies – nothing ends in four zero’s in real life. If you can not count it, do not do it. Never give or accept a task that is not quantified and time-limited.

What Kind of Campaign Will You Wage?

A campaign is an organized, coordinated set of programs designed to deliver specific messages to targeted groups and individuals with the goal of getting these groups or individuals to behave in a certain way.

Electoral campaigns – A conversation between the candidate and the voter that culminates in an effort to turn out supporters at the polls. These are what most people think of when they hear the word ‘campaign.’ The target for this kind of campaign is the voting public.

Issue advocacy campaigns – Also known as legislative issue campaigns. These are efforts to convince appropriate decision makers to support or oppose a piece of legislation or regulatory power. The target is the decision maker (often an elected official). The decision-maker’s constituency is often also targeted as a strategy to influence the decision-maker.

Initiative or Referendum campaigns - Mixes elements of the previous two campaigns. An issue is put on the ballot as a bill and the voting public decides to accept or reject new legislation. Since the voting public is the decision-maker, voters are the target.

Corporate Accountability campaigns - Encourages responsible behavior from a specific corporation. This kind of campaign is not immediately familiar with most people unless it escalates into a boycott or other high-visibility strategy. The target is almost always a corporate brand name; Consumers are often also targeted as a strategy to influence the corporation (i.e. boycotts, etc).

The Political Landscape Memo

All well-organized campaigns begin with a political landscape memo. This memo outlines the race, the candidates, the strategy, and the anticipated tactics your campaign will use to win. The document describes the people, time, and money resources required for victory. This memo includes specific information and detailed estimates on the district, the different candidates and their resources, and the factors affecting the race. This memo is a strictly objective outline used as a starting point for your race.

This is your campaign's first product. Having a good landscape memo shows others that the campaign is serious about the election. Party organizations, early donors, and your first staff need to have a sense of what they are about to get into. Most importantly, the memo allows you to predict and plan your campaign.

Do your homework

- 1) The district
- 2) The election
- 3) The candidate
- 4) The opposition

The District. Your district's vital statistics are critical for planning your campaign. They will help you determine your initial strategy, messaging, and targeting. Serious candidates and staffers have these numbers committed to memory. District info to know:

<ul style="list-style-type: none"> • Physical boundaries • Major population centers • Major media outlets covering the district. • Demographic information: populations, race, age, income, housing. 	<ul style="list-style-type: none"> • Registration numbers: Dem, Rep, others, decline to state • Democratic turnout in past elections for the same seat. • Money raised and spent in the last similar election.
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The Election. Every election is unique. Understand the larger political environment. Election info to know:

<ul style="list-style-type: none"> • Are you running as part of a slate? • How will organizing at the top of the ticket affect your race? • Will other candidates be active in your district? • Are there initiatives on the ballot? • What resources can you expect from your Party or Caucus? 	<ul style="list-style-type: none"> • Factors that differentiate this election from others for the same seat. How might these effect your assumptions? • What are the major local issues relevant to your desired office? • What are the major national issues on the minds of voters?
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The Candidate and Likely Challengers. Start developing an early biography of your candidate. What makes your candidate compelling? What's the campaign story? The campaign needs to be ready to highlight the candidate's outstanding personal story, but also ready for less favorable information to come out. The best defense for personally negative attacks is to know they're coming. This information will also help your campaign develop its base in its initial outreach efforts. Biographical info to know:

<ul style="list-style-type: none"> • Employment • Religious affiliations • Community involvement • Memberships, associations and affiliations 	<ul style="list-style-type: none"> • Business interests • Past public offices/voting record • Existing social networks • The same information for close family members.
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Using Your Landscape Memo

Determining Your Vote Goal

To win most elections you need a majority of votes cast, or 50%+1. If you have the basic information for your landscape, you should be able to figure out this number. Start with total number of registered voters in the district, then multiply that by the percentage of voters likely to turn out for this election. Likely turnout is calculated by looking at the last few similar elections for the same seat, excluding outliers (presidential election years are useless for midterm election estimates, for example), then divide by two and add one:

$$((\text{Total Registered Voters} \times \text{Expected Voter Turnout}) \times 50\%) + 1 = \text{Minimum \# votes needed to win.}$$

To give us a margin of error, we often calculate 52%, instead of 50% +1.

When we discuss targeting strategy, we'll use this number and work backwards, figuring out where these votes will come from. Of course, it would be wonderful if everyone voted for our candidate, but in reality we have limited resources and must focus these resources where they are most effective. Once we have our vote goal, we can figure out how many of our base voters we need, how many swing voters we need, etc.

Developing Your Core

Your landscape memo will give you an idea of whom your early supporters might be. In addition to the candidate's close friends and family, your candidate may have close personal or professional ties with a number of organizations and constituencies. These close connections must be leveraged early on to get the campaign off the ground. Outsiders and potential donors keep a close eye on candidates to see if they are serious about running. You must cultivate early allies and donors from these initial connections in order to expand your network of supporters and sustain your campaign.

Early Targeting and Messaging

Your landscape memo will clue you into what your district needs to hear from a serious candidate. For example, the single-family, homeowner demographic will require different outreach than transient, young, apartment dwellers. Factors like age, race, and sex matter.

Writing Your Landscape Memo: Research

The US Census website, www.census.gov has basic demographic information such as age, race, sex, income, and housing.

The American Factfinder tool can be found at <http://factfinder.census.gov/home/saff>

To search by city and county, <http://quickfacts.census.gov/>

District maps are available at <http://nationalatlas.gov/printable/congress.html>, but once your campaign begins you will want to use larger, more detailed maps where districts and precincts are sorted for you. These are available at your county elections office.

A *voter roll* is a public document which also be found at your county elections office or town clerk's office. A *voter file* maintained by campaigns and political parties and contains detailed information on voters based on past campaign work and other enhancements. It is a campaign tool used to track registered voters' contact info, voting history, and voter support information. You can obtain these from your local Party, previous campaigns, or from various vendors.

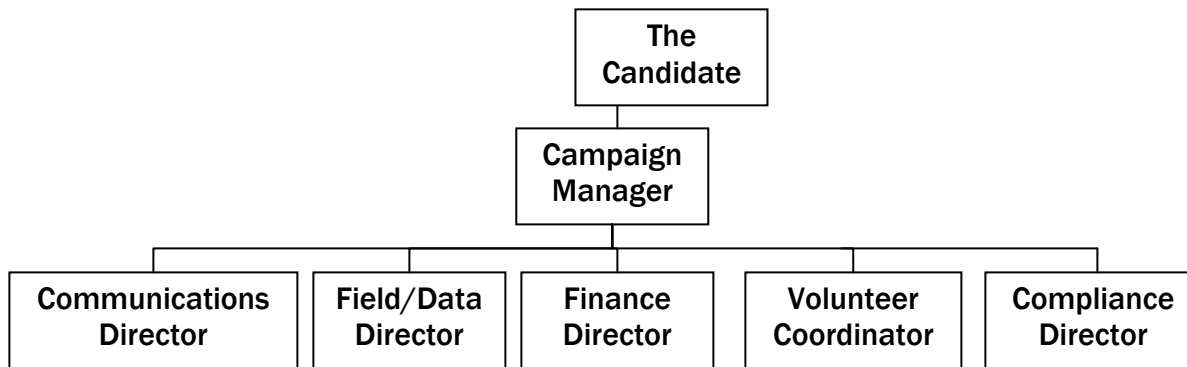
A sample Landscape Memo can be found in Appendix A.

Are you reinventing the wheel?

Most likely, it's all been done before. Candidates who've come before you, and/or your local Party organization may already have a landscape memo. Ask for it, and update it. They might also have a Voter File for you.

Typical Electoral Campaign Structure

Individual campaigns vary as much in structure and organization as do candidates for office. In general, most campaign structures look something like the diagram below. In some races you may have additional staff and assignments, but in all races someone is responsible for managing the field, fundraising, communications, and volunteer efforts.



The Candidate

- Campaigns are usually a reflection of the candidate.
- Good candidates trust his or her campaign staff.
- Candidates should focus their time and energy on campaigning rather than management.

The Campaign Manager

- Campaign managers work for the candidate, but a good campaign manager manages “up” as well as “down.” Get to know your candidate. Make sure he or she stays on task. Also make sure your candidate gets enough rest and exercise, make sure he or she eats well and has fun. Campaign work is grueling and most candidates are not used to it.
- There is only one captain of the ship. But to run a tight ship, you must treat your crew with courtesy and respect. Listen to your crew; they may have problems that you need to deal with right away. Campaigns collapse when the decision-maker refuses to make decisions, or makes decisions without considering all parts of the campaign.
- The campaign manager is responsible and accountable for everything: time, people, and money.
- The most important job of the campaign manager is making sure all the other directors and coordinators are doing their jobs.
- This is often the first person a candidate hires.

The Finance Director

- The finance director is responsible for fundraising to meet campaign targets and budget requirements set by the campaign manager. The finance director is responsible for meeting these targets in strict accordance with applicable regulations.
- Tactics include direct mail, online solicitation, PAC endorsements, candidate call time, and events.
- Your best assets are the candidate and a phone.
- Early donors are the key to running a sustaining, successful campaign. As a result, finance directors are usually the first or second person hired.

The Compliance Director

- Often the campaign’s treasurer.
- Files all the necessary paperwork for federal, state, and local regulatory agencies

The Communications Director

- The communications director keeps the campaign and the candidate “on-message.”
- Only the candidate, the campaign manager, and those designated by the Communications Director may speak for the campaign.
- The communications director reviews all campaign communications material – TV, radio, internet, brochures, mailers, direct mail, door lit, bumper stickers, rally and lawn signs – to make sure they adhere to a consistent campaign theme and message.
- In larger campaigns, the communications director will hire a press secretary to maximize earned media for the candidate.

The Field Director

- The field director designs the voter contact plan for base and persuasion voters.
- He or she manages most of the day-to-day tactical operations – phone banks, canvasses, house meetings, rallies, and visibility.
- The field director is responsible for obtaining and updating voter data for the campaign. In larger campaigns a field director will hire a data director.
- Field teams are usually most in need of volunteers. The field director must work closely with the volunteer coordinator.

The Volunteer Coordinator

- Volunteers are a force multiplier in your campaign. Recruiting, retaining, training, and allocating volunteers are the jobs of the volunteer coordinator.
- Volunteers can be used in any campaign department, so it is the volunteer coordinator’s job to stay on top of these needs and opportunities. Campaigns are full of volunteers, not staff.
- Local volunteers are better validators for your candidate than any campaign material or even campaign staff.
- The best volunteer coordinators develop volunteers into leaders. These volunteers will eventually take on parts of the volunteer coordinator’s tasks. Ideally, the volunteer coordinator can step back and become a volunteer him or herself.

Other Important Players

The Consultants

- These are people hired to supplement work done by your staff, or substitute for staff and skills you might lack. Their expertise comes in every imaginable field, and they are usually very good at what they do.
- They can also be extremely expensive, usually non-local, and often unnecessary if you have your own trained staff and volunteers.

The Lawyers

- Familiarize yourself with the law. Campaigns of any significant size should have legal counsel. You don’t want to do anything illegal (you don’t – it’s not worth it), and having careful counsel will help you navigate the system and avoid unknown improprieties.
- This training does not give legal advice, and nothing we say should be taken as such. Get your own!

The Family and Other Surrogates

- The candidate’s family must support the candidate’s run. When a candidate runs, the candidate’s whole family is running.
- Ideally, the family is available for the campaign. Family members are often the best surrogates for the candidate.

If the family is part of the campaign, they must understand the campaign message and be able to stay on it. The campaign manager must be comfortable enough with the family (and vice versa).