



Chapter 2

Electoral Field Planning

Drafting Your Field Plan

Here is your choice: You can diligently plan your campaign, updating as necessary, and maybe you will achieve success. Or, you can decide the plan is not so important and definitely, definitely fail. It's not an ideal choice, but it's what you've got.

The field plan is the campaign's blueprint for victory. The field plan is the series of strategies and tactics a campaign uses to gather the necessary votes to win an election. The media plan, the finance plan, and all the campaign's administrative capacity serves one goal: Support and operation capable of gathering the number of votes necessary to win the campaign. The field plan is that operation.

The field plan has four aspects:

1. **Calculating Your Vote Goal: electoral victory (goal)**
2. **Targeting Your Voters (strategy)**
3. **Contacting Voters (tactic)**
4. **Timelines and Benchmarks**

Your plan must detail the goals, strategies, and tactics necessary to execute a successful campaign.

Part 1: Calculate your vote goal.

Months before Election Day, the campaign must know how many votes the winner will need to receive on Election Day. This is a known number, specific to the campaign's district, which can be calculated even before the start of the race. This number is your vote goal – your campaign's overarching objective is to reach that number.

Campaigns are fueled by resources. With few exceptions, these resources are limited. Most campaigns will never have enough money, time and volunteers to talk to every voter. But we also don't need to talk to every voter. Most campaigns must achieve a simple majority (50%+1). The campaign must focus getting the votes it needs to win before it can spend resources on everyone else.

To estimate how many votes we need to win an election, we use the following formulas:

1. **Registered Voters x Projected Voter Turnout = Expected Vote**
2. **Expected Vote ÷ 2 + 1 = Number of Votes We Need to Win**

The number of registered voters in a district can be obtained by your county elections official or from the state Secretary of State's office.

Projected voter turnout is a little bit trickier. The best indicator of future performance is past behavior. However, not all elections are equal. In 2004, a record number of voters went to the polls and cast their vote. This was likely due to the prominence of the presidential race and the large investments of many organizations to educate and mobilize voters. However, in years where there is not a presidential election, like 2006, many voters will not participate. Other factors contribute to varying voter turnout as well: open seat elections and high-profile competitive races have higher voter turnout, whereas underwhelming candidates and inclement weather create lower voter turnout. The key to projecting turnout using past elections is to compare *similar* past elections.

Use the worksheet below to calculate turnout for a given race:

Turnout in Last Election for Same Seat

- a) Year: _____
- b) Total registration: _____
- c) Total votes cast: _____
- d) % Turnout: _____

Other Relevant Election 1

- a) Year: _____
- b) Total registration: _____
- d) Total votes cast: _____
- e) % Turnout: _____

Other Relevant Election 2

- a) Year: _____
- b) Total registration: _____
- d) Total votes cast: _____
- e) % Turnout: _____

Use as many relevant elections as you feel necessary to reach a reasonable average turnout

Calculate Anticipated Turnout

	Total Registration
x	projected turnout percentage
=	anticipated turnout

Divide By Two

	Anticipated turnout
x	0.50
=	50% of anticipated vote

Vote Goal:

	50% of anticipated vote
+	1
=	VICTORY

Many field plans calculate 52% or more to use as the vote goal to achieve a margin of safety.

Part 2: Targeting Your Voters.

Once the campaign figures out the vote goal for the district, the next task is to figure out where to get these voters from. Again, a campaign's resources are limited. Because the campaign does not have enough time, people, or money to sit down and target every single voter in the district, targeting is used to see where these resources can be spent most efficiently. Targeting is an exercise in resource management.

Campaigns seek to influence two kinds of voter behavior – whether the registered voter shows up to vote, and who the voter will end up supporting on Election Day. By understanding which behavior the campaign seeks to change, targeting helps us shape the campaign's message.

A campaign targets voters using three methods: Targeting with geographic trends, targeting using voter history, and targeting with polling data.

Geographic Targeting

Not all elections are the same, and not all voters perform equally. Similarly, not all places perform equally. For example, most Democratic voters often come out of the cities. Do we want to win the rural counties? Of course. But when considering a campaign's limited resources, it makes sense to utilize the strongest precincts and send resources where they can make a difference in the election. In the long term, this creates a problem because campaigns do not make investments in these low-support areas necessary to increase its support. But campaigns can not make long term investments in anything. A campaign is not a long term entity. In its short time, a campaign exists for only one goal: to garner as many votes as possible at the lowest possible cost.

Why can't the campaign be in every precinct?

Campaigns are short-term entities with limited resources. To correct long-term problems like the lack of investment in low Democratic performance areas, a long-term entity is required. Campaigns are not an appropriate entity. Please see the section in this manual on long-term precinct organizing.

Calculating vote goals at the county level will assist in identifying how much people, time and money should be allocated to each region. Certain geographic areas have specific voting rates and partisan splits again and again over many election cycles. The Field Planning Exercise in Appendix A will help you determine where is the best use of your campaign's limited resources.

Precincts can generally be divided into three categories, Democratic Base precincts, Swing Precincts and Republican Base precincts. Democratic Base precincts vote Democratic more than 65% of the time. The same is true of the GOP vote in GOP Base precincts. Swing Precincts are split Democratic and Republican. An analysis of the district's precincts will show us if a campaign can win just by turning out its base precincts, or if it needs to target swing districts.

Targeting with voter history

Most districts' voter rolls will show with which Party a voter is affiliated and when that voter has voted in the past. This information is public and by utilizing it, we can identify which voters are most likely to miss a low profile election and which voters wouldn't dream of missing an election.

Frequent voters are people who go to the polls for almost every election and almost every year. We do not need to do much to motivate them to vote. Rather, we just want to make sure that when they vote –we have given them the education they need to support our campaign. The term "4x4 voter," for example, means a voter who has voted in all four of the last four elections – including primaries and off-years.

Infrequent voters do not turn out for every election, and they likely need some needling to get to the polls. These individuals may vote during the presidential elections, but often do not vote in off-year elections. We need to work extra-hard to get supportive infrequent voters to the polls.

Identifying the voter’s past performance, answers the question of which behavior to influence. Frequent voters will likely show up to the election – the campaign needs to make sure that those voters vote for the right candidate. Infrequent voters might or might not show up. The campaign needs to identify which of these voters support the candidate, and make sure those supporters vote. What can you tell about the voter below:

	2004 Primary	2004 General	2006 Primary	2006 General	
Smith, Al		X		X	2x4
Stevens, Sally		X	X	X	3x4
Thomas, Bill					0x4
Thompson, Jan				X	1x4
Thompson, Tim				X	1x4
Orville, Wright	X	X	X	X	4x4

Who are the most likely to vote in the 2008 Primary?
 Who are the most likely to vote in the 2008 General?
 Who are least likely to vote?

Working with a Voter File

In addition to the publicly available voter rolls, your local party may have access to a Voter File. A Voter File combines the publicly available data with information gathered through voter contact. By calling a voter on telephone or speaking to them face to face, a campaign can determine how likely they are to support a specific candidate or party. As you contact more voters and update your voter file, it becomes possible to target specific voters based on how frequently they vote and whom they usually vote for. We’ll discuss Voter Files and tracking voter preferences more in the next chapter.

Targeting with Polling and Demographics

A voter file helps us identify the frequency of individual voters by using their voter history, but there are other things about voters that we’d like to identify as well, such as which voters are likely to respond positively to our campaign message. Many campaigns use polling or focus groups that help inform us about which groups of voters are most likely to support us, oppose us, or be undecided. For instance, a poll may show that 80 percent of women between the ages of 35 and 50 support our issue or candidate, but that 50 percent of men between the ages of 35 and 50 are undecided. The campaign can then spend its resources making sure women between 35 and 50 get out to vote. If the campaign requires more votes, it knows to spend the remaining resources persuading men 35 to 50 to support the issue or candidate.

Many down-ballot campaigns will not have the financial resources to conduct a professional poll unless polling information is available from a larger coordinated campaign effort. A voter ID program might also be developed to help the campaign identify issues and demographics favorable to the candidate.

A grassroots campaign should substitute a dedicated phone ID program to determine the campaign’s targeting priorities.

Setting Timelines and Benchmarks

So far, the campaign has determined the overall vote goal, targeted voters and evaluated voter contact tactics – all the aspects necessary to construct a field plan. In order to put together a plan, these aspects must be placed in the timeline of the campaign and given benchmarks by which to measure progress. Unless each aspect of the plan is measured against the time remaining until the election, the campaign plan is meaningless. The campaign can increase its finances, it can motivate more grassroots activists, but it can never, never reclaim lost time. Campaign product (voters contacted, funds raised, etc) must always be measured against the time remaining.

Good plans start at the end of the timeline with the desired goal and work backwards to the present. An electoral campaign's goal is the vote goal achieved by Election Day. Each week of the field plan has a goal to find a certain number of supporters through its voter contact plan. If you need 5000 votes on Election Day, your goal for the week before might be 4800 identified supporters. The week before that your goal might be to have identified 4600 supporters and so on. These benchmarks determine how to allocate resources efficiently and allow the campaign to adjust the plan as necessary.

Once benchmarks are set for the campaign, tactics to reach these benchmarks must be determined. In order to do this, a number of assumptions need to be made. If you need to identify 200 supporters in one week, how many voters will you need to contact? How much time will it take to contact these voters? What methods yield the most supporters per week?

Good Rates to figure out:

- Voters per household
- Households knocked/ hour
- Households contacted/ hour
- Phone calls/hour
- Phone contacts/ hour
- Above rates for voter ID
- Above rates for voter persuasion

A generic timeline follows on the next page. A campaign plan can be broken down further by week and by day, all having specific and quantified goals for each tactic.

A field plan can be written in any form – text paragraph, bullet points, or charts, but it **MUST** be written down. This field plan is a basic summary chart for a campaign starting in June, with a little over five months to plan. The accompanying benchmarks will vary with the particulars of each district, but in every field plan, the majority time will be spent on direct voter contact activities. Your detailed plan will be organized by each week and will have numerical benchmarks for each week and each tactic.

Realm	June - July	August	Early Sept	Late September	Early October	Late October	Election weekend	Election Day
Voter Contact	- Field director writes plan - Determine voter targets, messaging.	- Voter Reg in High Dem areas - Begin Voter ID canvass	- Voter Reg in High Dem areas - Voter ID canvass and phone - Begin phone bank for voter ID	- Voter Reg Rallies - Voter ID canvass and phone	- Voter ID - Begin Election Day planning	- Finish Voter ID	GOTV all high Dem pcts., identified + voters	GOTV! (door to door, phone banks)
Voter ID Benchmarks		500 supporter ID (10%)	1000 supporter ID (20%)	2000 supporter ID (40%)	3500 supporter ID (70%)	5000 supporter ID (100%)		
Volunteers	- Build lists of potential volunteers	- Recruit and train canvassers - Begin Saturday canvass, focus on vol rec't. - Pct. captains recruitment	- Begin scheduling in volunteers for regular shifts. - Precinct captains in place	- Weekly Saturday mobilizations, focus on voter contact	- Continue Saturday mobilizations - Daily phone banking, canvassing	- Focus on Election Day	- Recruit for Election Day	Volunteers GOTV
Staff Management	- Hire senior field staff, regional coordinators	- Hire regional coordinators, recruit field organizers - Hold staff trainings	- Organizers hired for all targeted regions - District-wide all staff training.	- Remaining staffing needs filled	- Prepare election day GOTV plan.	- Organize statewide staff training for election day	- Prepare for Election day	GOTV/ Prepare for Victory Party
Visibility			- Yard signs in targeted precincts - Major events (i.e. kickoff, labor day rally, etc)	- Continue visibility - Rallies featuring candidate's surrogate	- Continue visibility - Rallies featuring candidate and candidate's surrogate	Focus on high democratic areas. Candidate and surrogate rallies.	-Signs and appearances from all targeted areas	Use sound trucks, media... keep visibility high
Administrative Systems	- Scout out regional field offices, if needed. - Weekly reports from coordinators	- Set up regional field offices, if needed. - Weekly reports from coordinators	- Offices set up in all targeted areas. - Twice a week reporting from all coordinators	- Twice a week reporting from all coordinators	- Twice a week reporting from all coordinators	- Twice a week reporting from all coordinators	-Daily reporting from coordinators	- Stay in contact with coordinators
Material Resources	- ID phone bank locations, phones, office space, etc	- ID phone bank locations, phones, office space, etc	- Lit and materials for canvass	- Continue with lit and materials for voter contact	- Prepare election day plan and materials	- Prepare Get Out the Vote lists, distribute election day materials	-Prepare signs and publicity materials	- Victory party preparations

Voter History Targeting Guide

Box A: These people always vote. Sometimes they vote Democratic, sometimes they vote Republican. Your campaign must persuade them to vote Democratic. Most of your resources leading up to the GOTV phase are spent talking to these voters.

Box B: These people always vote Democratic, but they don't always vote. You do not need to persuade them whom to vote for, but you do need to drag them to the polls. In the GOTV phase of your campaign, these people are the top priority.

Box C: These people sometimes vote. Sometimes they vote for a Republican, sometimes they vote for a Democrat. This is the most resource-intensive group of voters out of A, B, and C, because many of those you do persuade will not vote. You will need to spend resources IDing, Persuading, and GOTVing these voters.

Box D: These are ideal Democratic voters. They always vote, and always vote Democratic. Contact these voters early in the campaign to build your fundraising and volunteer base. You don't need to spend money persuading them and relatively little on getting them out to vote.

Box E: These voters never vote. Spend resources on these people if and only if you have saturated the voters in Boxes A, B, C, and D. Most campaigns do not have the resources to waste on these voters.

Box F: These are solid Republican voters. The campaign does not have the resources to spend with these voters.

Partisanship

		Strongly Supports (1)	Undecided (2, 3, 4)	Strongly Opposes (5)
Turnout	Always Vote (4x4)	D Super-voters	A Persuasion	F
	Sometimes Vote (2x4)	B Dem GOTV	C Persuasion #2	F
	Never Vote (0x4)	E	E	F

