

# GETTING

## STARTED

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## CHAPTER 2

# GETTING STARTED

### INTRODUCTION

When the campaign first begins, you'll probably feel like you're trying to drink from a fire hose. Information is flying at you fast. Decisions feel important and immediate. You feel like every aspect of the campaign has to be addressed NOW.

Take a deep breath and remember the campaign is a marathon, not a sprint. To begin, just focus on managing these priorities:

- ✓ Creating a deliberate culture
- ✓ Creating basic administrative processes
- ✓ Establishing a basic early budget and fundraising process that is meeting goals
- ✓ Establishing an initial presence online
- ✓ Setting up structures for recruiting and absorbing volunteers
- ✓ Hiring staff and consultants

This chapter provides a basic guide to help you manage these priorities, collect early resources that come your way, and keep you out of trouble later.

## CREATING A DELIBERATE CULTURE

### **Every campaign has a culture**

Every campaign has a culture—the way staff and volunteers engage with each other and your opponent and their staff. The challenge is taking the time and creating the space to develop that culture deliberately with your candidate and staff.

Take a few minutes early in the campaign to think through when and how you will engage your new team in conversation around the values they share that brought them to the campaign and the values and experiences that inform the way they want to work together. One way to do this is to have a meeting very early on explicitly for that purpose, where your team gets to know each other's stories and spends time articulating a few key principles they agree to live by. On the Obama campaign the mantra "Respect. Empower. Include." developed by Paul Tewes and his staff in Iowa became the guiding principles of the campaign.

Talk about how will staff treat each other? How will they treat the candidate and vice versa? How will you all treat your opponent and their staff when you see them?

It's important that this is an engaging team conversation that the team feels responsibility for generating and can then be held accountable to.

### **Create a culture of accountability, not rules.**

Every campaign as a few core rules for staff. However, it will be impossible for you to create enough rules to manage all of the people you need to engage in your campaign to win. Think about how to create a culture where staff and volunteers are trained to hold each other accountable to achieving performance outcomes, but also to hold each other accountable to the values that bring them together. What training or role playing would that sort of accountability require?

### **Create a culture of excellence**

Strong campaigns are those where staff and volunteers are committed not just to the candidate, but also to each other in a common purpose to win. A culture of excellence isn't one that demands instantaneous excellence, or one that threatens to publicly humiliate poor performance for the sake of exercising power.

A culture of excellence is one built on transparency of goals and progress to goals, where staff and volunteers have ownership over and responsibility for key outcomes. It's one where with clarity of goals your team will lean in, drive themselves and strive for more.

That culture is not possible in a campaign based on fear of embarrassment or fear to admit failure. It only thrives in a context where you as the Manager have created daily and weekly opportunities to evaluate outcomes together, to understand who's doing well and why, who's struggling and why, to help each other problem solve, and to recommit to striving for excellence together.

It's the difference between having everyone get on a conference call just to report numbers, and having them report transparently so everyone can see in a Google spreadsheet, then using the call to analyze the outcomes on that spreadsheet together.

### **Create a culture of learning**

Your entire team—candidate, consultants, staff and volunteers will not know at the beginning of the campaign what they'll need to know at the end. Whatever past experience they've had on campaigns is useful information, but this campaign is new, will face new opportunities and new challenges, and it will only be weathered with a strong commitment to learning and improving over time.

How will you get coached? By whom? How will you set up clear coaching structures across your campaign? How will you reward learning and improvement over time?

Prepare yourself not to complain about your staff, but to ask "if they're failing, what have I done wrong?"

## CREATING BASIC ADMINISTRATIVE SYSTEMS

### Get some help

This is an Engagement Campaign, so there's no better time than now to start engaging. Find a full-time volunteer assistant or set up a schedule for part-time volunteer office assistants. (Political science majors at your local college are great candidates.) Even if you are the only paid staffer, there are tasks you must immediately delegate, like answering the phone, gathering news clips and greeting walk-in traffic.

### Decide some basic roles

Decide who will be the campaign attorney and treasurer, then run the legal papers by them before you file. The attorney should be a close friend or associate of the candidate who will be accessible throughout the course of the race, and has some experience with the laws governing the kind of race you're running (federal vs. state vs. local).

Hire either an accountant or a professional service to handle the payroll and other campaign tax issues.

### Get official

- File a statement of organization with the appropriate election division (Federal Election Commission, Secretary of State, etc.)
- Open a campaign checking account.
- Get a post office box.
- Get a telephone number. The telephone number should not be the candidate's or your own personal mobile phone number.
- Get an office. The office should not be in the candidate's home.
- Take inventory of whatever resources you have access to - computers, desks, printers, office supplies, and copiers.
- Create a form explaining the laws governing in-kind contributions for your race and asking for the donor information needed for those who make in-kind contributions.
- Make a list of the office furniture, equipment and supplies that you will need (computers, desks, printers, office supplies, copiers) and start soliciting those in-kind contributions.
- Make a short list of the essential early needs of the campaign that you can't get through in-kind donations. BE CONSERVATIVE! Money spent now is money you won't have next November to run that last TV ad.

**Create order**

Set up administrative systems that will control the inevitable chaos of the campaign. These systems will organize the important information arriving into the campaign and give you a process to decide what information and resources leave the campaign.

*Finance:*

Decide what finance database the campaign will use to track potential donors, pledges, and contributions and to create the finance reports. If you have no money, that means starting with simple spreadsheets. In the short term, at least be sure every check received by the campaign is photocopied (with any materials that arrive with it) and filed by the date received. Save and file all bank information, including copies of deposit slips and bank receipts.

*Press:*

Decide with your candidate what the approval process will be for all of the text on the website, press releases, and other external communications materials. Who makes the final sign-off? Who is allowed to speak to the press? Who is not?

*Scheduling:*

How are scheduling requests received? How will you and the candidate coordinate the candidate's schedule before decisions and promises are made? How are scheduling requests politely declined or deferred? If the candidate has scheduling staff in another government office, or company, what role does that scheduler play vs. campaign staff? What are the ground rules around changing campaign time, especially call time? Important campaign time like call time should not be subject to change by people outside the campaign.

## STARTING YOUR BUDGET

Your budget will be a living document—a written, detailed roadmap of your campaign strategy that you live by and revise routinely over time. It reflects the campaign’s priorities and your beliefs about where investing your money will get the greatest return. A budget from another campaign (or the candidate’s previous race) will NOT suffice for your campaign. Before you spend anything, you need a basic budget that you can flesh out later in more detail.

There is no magic formula for creating a budget, and there is certainly no budget fairy who will do this for you. This is one of your major jobs as Campaign Manager, so put aside any money anxieties you may have and focus on investing the time it will take to create your budget. Schedule a regular time in your daily and weekly agenda to review and revise your budget on a regular basis.

### **Set an overall budget number. How much will it cost to win?**

Start with some research. How much did the last campaign for this candidate or in this district cost? Depending on the type of race (local, state or federal), you can find this out from the FEC or your from your state. Based on an assessment of your strengths and weaknesses as a campaign how will that number change? For example, do you expect to need to spend more money this cycle fighting online rumors, or more money hiring field organizers to turn out your base?

Create both an ideal (or high) version and a minimum (or low) version of your budget. Get estimates from consultants for the big chunks of your budget, like paid media, online support, research, and field. Ask for one set of quotes that covers everything you could need in a race like this—your Cadillac budget. Ask for another set of quotes that covers the basics of what you’d have to have in order to win—your motorcycle budget.

Choose a budget number in between those two—one that challenges you to do more, but that is also realistic.



**Build out your budget in chunks with the biggest items first**

Write your budget in a spreadsheet and organize it into categories by department in rows down the side, with the timeline across columns at the top (by month at first).

**1. Paid communications**

Ask media consultants for a quote that covers all your paid media, including TV ads, online ads, radio, direct mail, etc. Don't be shy about asking questions and really understanding this quote.

**2. Research**

Add your research costs, including polling and outside research assistance.

**3. Fundraising**

Bring in Finance Assistants if possible. Estimate event costs.

**4. Field**

Bring in good Organizers as early as possible to recruit and develop strong volunteers, rather than only paying for direct voter contact at the end. Add in costs for materials, like literature, buying lists, and GOTV.

**5. Online**

Add up your site hosting and development costs. If your campaign is large enough bring in a New Media Director to help generate money, support and coverage online.

**6. Administration**

Consider overhead costs, like offices, phones, materials and database fees.

**Step back and evaluate**

No two campaigns are the same, and the biggest difference in budget will be determined by how the campaign will communicate with voters using paid media. This is largely a function of how expensive the media markets are in your turf.

Check your budget to see if it strikes roughly the right balance:

Paid Media	60-75%
Research	7-9%
Fundraising	8-10%
Field	7-9 %
Administration	4-6%

### Lay your budget out on a clear timeline

Start with Election Day and work backwards. The most important money is what you will spend to communicate with voters in the final weeks and days leading up to Election Day. Plug in your media buys first, then work backwards day by day and week by week from there.

Think carefully about when you will hire people to get the biggest return on your investment. A Finance Director or Finance Assistant hired early should generate much more for your campaign. In Field, investing in a stipend for a couple of solid, well-trained, well-supervised Organizers who start recruiting and developing volunteers early is probably worth more than only spending a pile of money just before Election Day on paid canvassers who will not be as invested in your campaign.

Sketch out the cash flow. When do you need to have money in, in order to pay expenses? The US Postal Service doesn't operate on credit, so if you need to send a big mailing, the money needs to be there well in advance.

### Flesh out the details

There should be no row on your budget called "miscellaneous." You need to guard this budget as if it were your own personal money and think twice—or three times—before you spend. Use as many rows as necessary in your budget to be clear with yourself, your candidate and your staff about what money can be spent, when, and for what.

### Ask for help

Ask your party committee for help, EMILY's List or similar campaign organizations, your consultants, and past campaign managers. You are ultimately responsible for the decisions made about the budget, but you can't make good decisions without good critical advice.

### Stick to your Budget!

The first money you raise should be put in reserve as the last money you'll spend on Election Day. Continue raising and saving that way until you come to the day that your reserves meet your projected costs for the remainder of the campaign.

Start, raising money →  ←Spend backwards

When you reach that day, you can start to spend down to zero every day from there forward (probably adding to your media buy or field staff) because every expense in the future has already been accounted for (media, utility, payroll, etc.).

Do not plan to end with a deficit. The goal is to end as near zero as possible, with more votes and no regrets. In the end game, it's all about generating and managing the cash flow.

Get used to saying no. The amount of money raised in an electoral campaign is more than most people ever see in one place. Naturally that means others will make constant asks for things that cost money because they see money coming in.

Learn to say no early, but also explain why you're saying no—why saving for GOTV and Election Day is so important. Staff and key volunteer leaders need to be able to communicate why the campaign is making the decisions it is. If they understand your decisions clearly, your best donors and volunteers will respect a frugal, resourceful campaign that uses their time and money well.

Think before you spend. The best campaigns have a culture of creative resourcefulness from top to bottom and it starts with you.

**Sample Budget Categories (very simplified):**

**Communications-PAID**

- Consultants
- Direct Mail
- Television/Radio Production
- Television Time
- Radio Time
- Website
- Online advertising

**Communications-EARNED**

- Communications staff
- Photos of the Candidate
- Digital Camera
- Website hosting

**Research**

- Baseline Poll
- Self and Opposition Research
- Focus Groups
- Tracking Poll

**Fundraising**

- Fundraising Staff
- BREs
- Direct Mail
- Events
- Postage
- Printing

**Field**

- Field Staff
- Election Day/GOTV Expenses
- Materials
- Volunteer expenses
- Voter Lists
- Yard Signs

**Administration**

- Campaign Manager
- Operations Staff
- Furniture
- Insurance
- Internet
- Letterhead
- Office Equipment- computers, copiers
- Office Supplies
- Postage
- Rent
- All Payroll Taxes
- Travel and mileage
- Utilities

## Chapter 2: Getting Started

Here is what the top page of a budget document might look like:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S		
			September	October	November	December	January	February	March	April	May	June	July	August	September	October	November		Total		
4	<b>ADMINISTRATION</b>																				
5		Rent	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 7,000.00	
6		Phone Exaltation					\$ 1,500.00													\$ 1,500.00	
7		Phone Service	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 500.00	\$ 14,000.00	
8		Computer/Printer/Reminds			\$ 1,000.00			\$ 500.00			\$ 500.00									\$ 13,500.00	
9		Copier			\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 500.00	\$ 6,000.00	
10		Internet	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 400.00	\$ 6,000.00	
11		Postage	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 400.00	\$ 3,000.00	
12		Office Supplies			\$ 100.00	\$ 100.00	\$ 100.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 1,000.00	
13		Letterhead/Envelopes					\$ 750.00													\$ 2,000.00	
14		Travel and Mileage																			
15		Personnel Overhead																			
16		Health Insurance			\$ 1,250.00	\$ 1,250.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 20,500.00	
17		Campaign Manager Salary	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 8,000.00	\$ 5,000.00	\$ 8,000.00	
18		Assistant/scheduler/offce manager			\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 20,000.00	
19		Taxes					\$ 2,450.00													\$ 2,450.00	
20		Payroll Service	\$ 125.00	\$ 125.00	\$ 125.00	\$ 125.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 175.00	\$ 2,075.00	
21		TOTAL	\$ 9,925.00	\$ 9,925.00	\$ 13,915.00	\$ 13,915.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 17,415.00	\$ 210,825.00	
22																					
24	<b>PAID MEDIA</b>																				
25		Direct Mail (mail and shoot)																		\$ 200,000.00	
26		Consultant/Statisticians										\$ 60,000.00			\$ 60,000.00					\$ 120,000.00	
27		Production																		\$ 589,000.00	
28		TV												\$ 107,000.00						\$ 107,000.00	
29		Cable																		\$ 60,000.00	
30		Online ads																		\$ 589,000.00	
31		TOTAL										\$ 60,000.00		\$ 107,000.00	\$ 60,000.00					\$ 896,000.00	
32																					
33	<b>RESEARCH</b>																				
34		Copies																			
35		Self	\$ 25,000.00																		
36		Opp	\$ 25,000.00																		
37		Materials																			
38		Travel																			
39		Poll/nc											\$ 32,000.00	\$ 21,500.00	\$ 21,500.00	\$ 66,000.00				\$ 141,000.00	
40		TOTAL											\$ 32,000.00	\$ 21,500.00	\$ 21,500.00	\$ 66,000.00				\$ 141,000.00	
41																					
42	<b>FIELD</b>																				
43		Field Director/Political				\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 4,000.00	\$ 1,000.00	\$ 1,000.00		\$ 44,000.00	
44		Water/Tric							\$ 4,000.00											\$ 4,000.00	
45		Persuasion Calls													\$ 3,000.00					\$ 3,000.00	
46		ID Calls																		\$ 9,000.00	
47		GO TV Calls														\$ 3,000.00				\$ 3,000.00	
48		Travel/Spence				\$ 450.00														\$ 450.00	
49		Supplies						\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 1,400.00	
50		Fellow												\$ 1,000.00						\$ 1,000.00	
51		Volunteer Support											\$ 200.00	\$ 200.00	\$ 400.00					\$ 1,000.00	
52		Door Handouts													\$ 4,500.00					\$ 4,500.00	
53		Signs												\$ 18,000.00						\$ 18,000.00	
54		Literature				\$ 6,000.00						\$ 4,000.00								\$ 3,500.00	
55		Events				\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 500.00	\$ 1,500.00						\$ 3,500.00	
56		TOTAL			\$ 0	\$ 0	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 200.00	\$ 11,900.00	\$ 14,900.00	\$ 14,900.00	\$ 7,600.00				\$ 169,800.00	
57																				\$ 450.00	
58	<b>COMMUNICATIONS</b>																				
59		Com.unications Director																			
60		Press Conferences									\$ 50.00			\$ 50.00	\$ 50.00					\$ 150.00	
61		Website																			
62		Hoarding																			
63		Press Kits																			
64		Subscriptions											\$ 75.00	\$ 75.00	\$ 75.00	\$ 75.00				\$ 300.00	
65		TOTAL											\$ 75.00	\$ 75.00	\$ 150.00	\$ 150.00				\$ 450.00	
66																					
67	<b>FUNDRAISING</b>																				
68		Credit Card Fees			\$ 100.00	\$ 125.00	\$ 100.00	\$ 00.00	\$ 150.00	\$ 125.00	\$ 125.00	\$ 150.00	\$ 150.00	\$ 175.00	\$ 150.00						\$ 1,450.00
69		Conten. Return										\$ 400.00	\$ 400.00	\$ 400.00						\$ 1,600.00	
70		Printing/Copies							\$ 5,000.00			\$ 5,000.00	\$ 7,500.00	\$ 7,500.00						\$ 17,500.00	
71		Postage			\$ 0.00				\$ 5,000.00			\$ 5,000.00	\$ 7,500.00	\$ 7,500.00						\$ 22,500.00	
72		Finance Director Salary			\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 55,000.00	
73		Finance Assistant			\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 27,500.00	
74		Catering										\$ 150.00	\$ 400.00	\$ 400.00	\$ 1,000.00					\$ 1,950.00	
75		Location Rentals										\$ 250.00	\$ 100.00	\$ 250.00	\$ 400.00					\$ 1,000.00	
76		TOTAL																			

## Chapter 2: Getting Started

Here is what the cash flow part of the budget document might look like:

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	
EXPENSES TOTAL	\$59,525	\$9,525	\$25,975	\$21,000	\$35,675	\$26,575	\$43,075	\$28,300	\$26,850	\$77,300	
RAISED TOTAL	\$150,000				\$96,000	\$96,000	\$183,200	\$36,100	\$41,100	\$87,900	
COH	\$150,000	\$90,475	\$80,950	\$54,975	\$33,975	\$94,300	\$163,725	\$303,850	\$311,650	\$325,900	\$336,500

## STARTING TO FUNDRAISE

Fundraising success is very dependent on creating a culture and good habits early. If you don't get this right at the beginning, it's hard to get back on track. So even before diving into your campaign plan, take some time to really figure out the systems you'll use to collect money, and GET STARTED!

### **Find out the boundaries of your fundraising**

*Externally imposed:*

What are the contribution limits for your race?

What information do you legally need to collect from each donor?

For federal races, all of this information is available through the website of the Federal Election Commission (FEC) at <http://www.fec.gov/law/feca/feca.pdf>

State and local campaigns need to find a similar manual provided by their state or local board of elections.

*Internally imposed:*

Will you take lobbyist or PAC money?

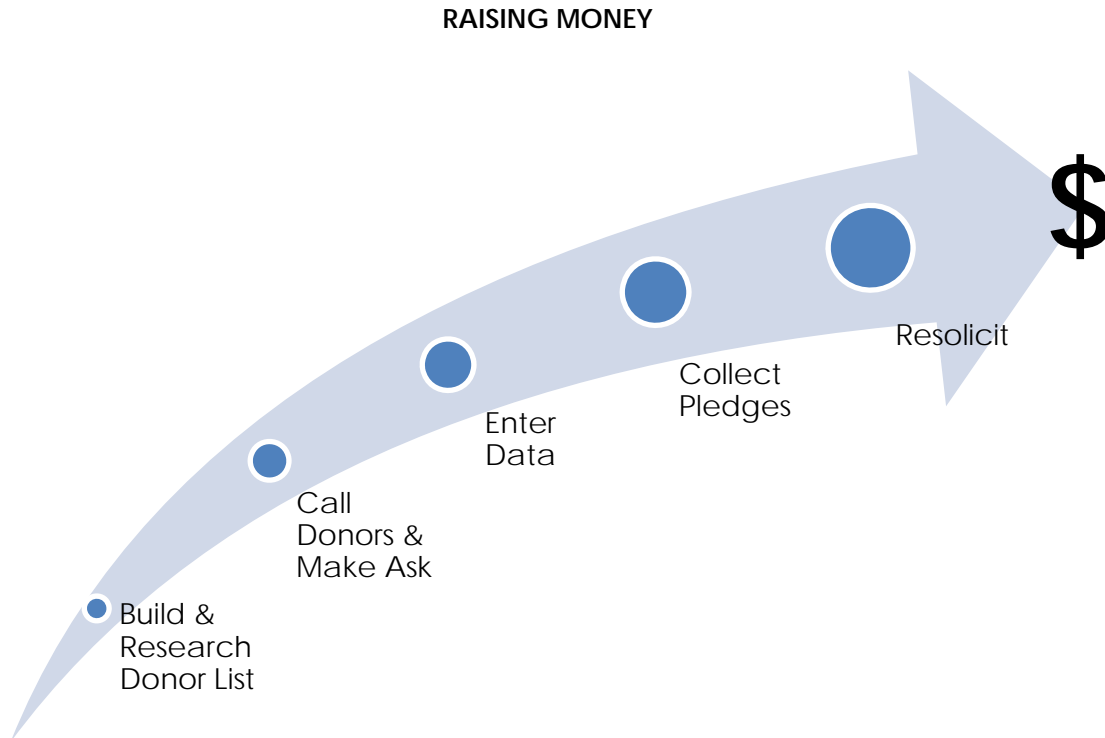
Will you limit contributions in any other way based on your candidate's principles or message?

### **Estimate the campaign's overall fundraising goal**

Your fundraising goal should match your budget estimate.

### Set up a fundraising system

Here's the basic process for fundraising. Take some time now to figure out each step of the process so that you and your candidate can get into a routine quickly.



### Build and research your campaign donor list

Find out if there is a previous donor list and what format it's in. Decide early with your candidate the best way to approach this list.

### Create a potential donor list

Go through the candidate's personal "Rolodex" to make a list of other prospects for early donors. Realistically, these will initially be friends, family and close, personal colleagues of the candidate.

### Set up a call sheet format

Work with your candidate to determine what additional information she would like on the call sheet besides name and telephone numbers. Start printing them. Standard fields for NGP or other databases are laid out on the sample call sheet that follows.

We cannot stress enough to you the importance of creating your own, unique prospect list based on the background, experiences and message of your candidate. One experienced Finance Director put it this way: What are the three things that set your candidate apart from other candidates? Figure them out and create lists specific to



those characteristics. Other candidates' contributor lists are unique to them and are never as useful to your campaign as you might think.

Also, it is ILLEGAL to use the FEC and many state contributor lists for your own fundraising purposes. You may use them for research only – perhaps to figure out an ask amount.

Good places to go on the web to do donor research:

www.fec.gov  
 www.fundrace.huffingtonpost.com  
 www.opensecrets.com  
 www.followthemoney.org  
 State or local Board of Elections website

### Stay ahead of your candidate

Although the initial prospect list will focus on friends and family, the finance staff needs to continually think ahead and create and acquire more lists for future call time and other fundraising activities.

Do the math to figure out how much staff time you need to stay ahead on donor research:

If your candidate can call through a list of 20 donors an hour, and it takes 15 minutes to research each donor and create a solid call sheet, that's five hours of staff research time for every one hour of candidate call time.

Don't wait until your candidate gets through her personal network to start doing the research on other donors!

### Establish Call Time as Sacred Campaign Time

Work with your candidate and any other schedulers she may have to get fundraising time on the calendar as a regular event. Call time should be a priority and other activities should be scheduled around it. Build a long-term call time calendar early. Your whole team, including the candidate, needs to respect that time without interruption.

**See sample candidate schedules at the end of this chapter.**

#### Call Time

At the beginning of the campaign, candidates should spend 80% of their campaign time raising money. If they have 20 hours per week to campaign, then 15 hours need to be fundraising.

Set call time groundrules among you (the manager), finance director and the candidate:

- The candidate should expect all call sheets to be researched thoroughly (call sheets should have a standard and complete set of data about the donor, a suggested ask, accurate phone numbers, etc.).
- The staff should expect call time discipline from each other and the candidate (hard start and end times for call time, setting and meeting call time goals, making a HARD ask).
- The candidate and manager should expect the Finance Director to provide daily or weekly reports recognizing and celebrating progress with the candidate and staff.

You are responsible for holding your team accountable to the groundrules you set together.

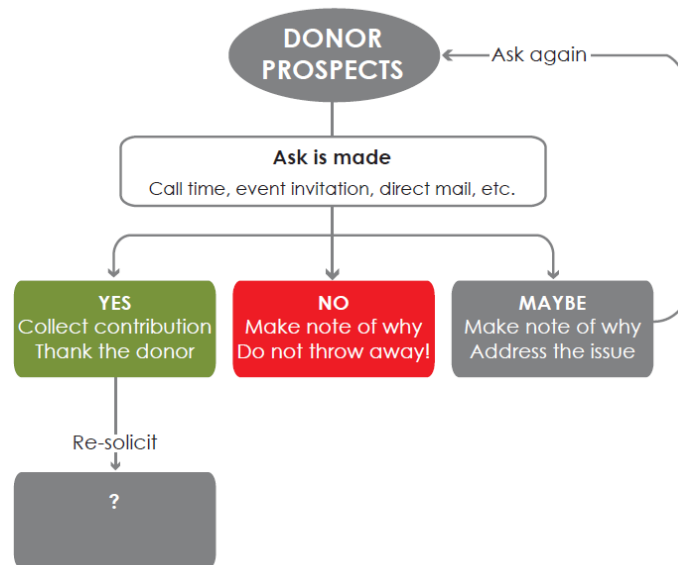
Work with the candidate so that she is asking for a specific contribution amount in the most effective way. **See the sample call time ask at the end of this chapter.**

### Prepare Your Data Systems

Decide on a finance database so that once fundraising call time begins (and it will begin today, right?), you can track the results, follow up on pledges, collect contributions, promptly thank donors for investing in your campaign and re-solicit donors for additional contributions.

If there is a prior contributor list, your first task is to import or transfer it to the database you will use for this campaign. Print it in a spreadsheet format so your candidate can use it to make notes for your initial call time.

All of the information from call time needs to go back in the database every day. Set up a system making sure this happens. Notes from call time and how you got the contributions (call time or event) are important for follow-up and re-solicitation.



### Collect pledges

Be sure your Finance Director or Finance Assistant has a very clear process for how and when to follow up on pledges. It will be easier for donors to say no to this person than to your candidate, so take some time to role play with them a good follow up call to politely remind donors of their pledges.

### Get ready to re-solicit

Create a re-solicitation schedule for the early phase of the campaign leading up to the first campaign finance report deadline. Keeping good notes in your database will make it easier to ask again.

### Start raising early

Ask the candidate, the candidate's spouse, and close family to donate the maximum amount immediately.

Start calling. It is vital that your candidate get to this step as soon as possible. Take a little bit of time to get things set up right, but don't wait too long. The candidate's personal network can be called first and doesn't require as much research. As soon as you have a system to track data, call time should begin.

Keep track of how many calls are made per hour, how many contacts are made per hour, how many pledges you're getting per hour and how much money is raised per hour. This information will help you schedule candidate call time with more accuracy as the campaign progresses. **See the sample tracking sheet at the end of this chapter.**

### Raising Money Online

Figure out how the campaign will collect online and other credit card contributions. You can apply for and set up a merchant account. You may also use ActBlue, a political committee that enables anyone to fundraise online for the candidates of their choice. Once you file the appropriate paperwork, an ActBlue account will be set up automatically for your campaign. Contributions received into that account are forwarded to the campaign weekly by check with an accompanying list of donors, amounts and pertinent donor information.

Figure out what your candidate needs in order to stay motivated. Does she want to know how much money comes in from call time each week? What other reports does she need?

Start forming a finance committee. In this tough economic time, the new power bases in fundraising are those who can bring new money into the campaign rather than those who can simply max out themselves.

People who are willing to engage their OWN social networks to raise money for the campaign, should be a strong focal point for your earliest volunteer fundraising efforts.

Set up a system where each committee member has a specific goal and deadline, and a system that allows all of the committee members to see everyone else's progress. NGP allows the campaign to set up personal fundraising pages for each finance committee member that can be viewed and managed by staff as well.

Set goals and timelines for the candidate, staff and volunteer raisers (finance committee) for the first FEC report deadline.

### **Hire finance staff as soon as possible.**

Hire a professional fundraiser with campaign experience as soon as possible. An early finance hire will be well worth their income down the line.

The more money you want to raise, the larger your staff needs to be. The ratio is usually one full-time finance staff person for every \$500,000 to be raised. Larger campaigns will require more staff. You can also train interns to be volunteer finance assistants.

### **Goals, Transparency, Accountability**

As we wrote in Chapter 1, an Engagement Campaign requires sound leadership practices, including clear goals, lateral as well as vertical transparency around results, and accountability for volunteers as well as staff.

Setting up your finance committee is a great place to start practicing those skills. Give your volunteer raisers clear group and individual goals, make sure they can see their own results and those produced by others to foster learning and improvement over time, and hold them accountable to goals for which they've taken responsibility.

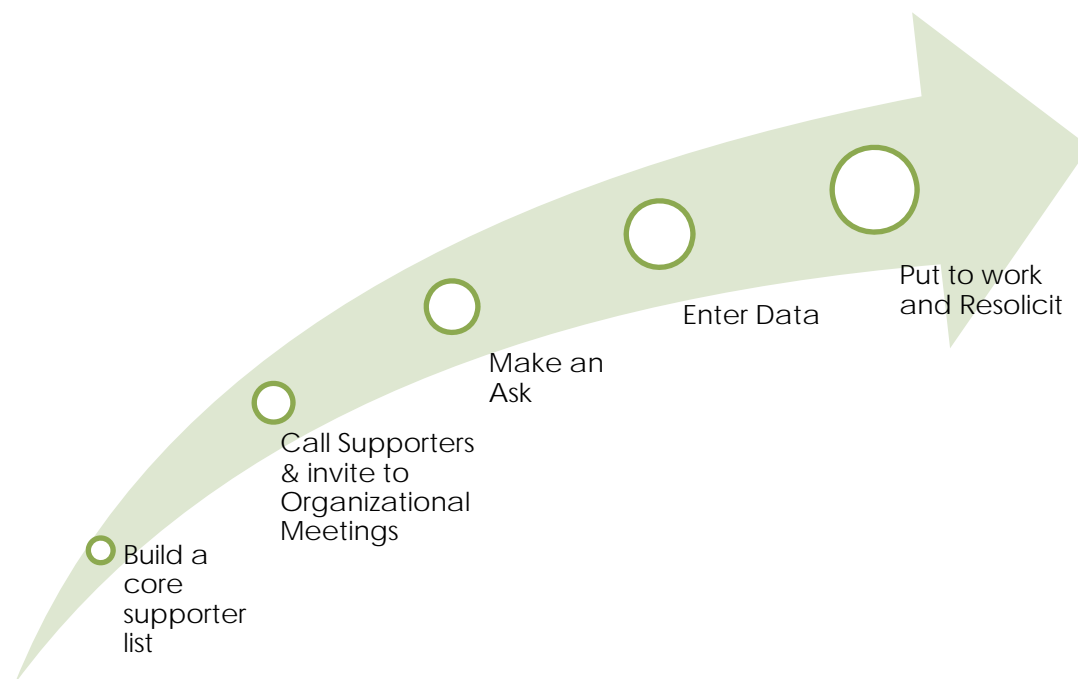
## MAKING ROOM FOR VOLUNTEERS

### Create a supporter and volunteer card

Create a simple supporter card with a clear volunteer ask that your candidate, advisors and key volunteers use to recruit supporters and volunteers at all events and in their own communities. Remember, human commitment is another currency in your campaign, so those commitment cards are like gold in hand.

### Prepare to raise human resources

The way you recruit and engage people as a resource for your campaign is not that much different than your basic fundraising process. It starts with generating a list of core supporters (volunteers from past campaigns, friends, neighbors) or volunteer prospects. Then putting your best volunteer on the phone to call through those people, invite them to an organizational meeting (ideally to meet the candidate), and ask them to take on the work of the campaign. Once they commit, be sure to set up a clear data system for tracking their commitment and work closely in a clear database.



### Create volunteer responsibilities, not just tasks

Brainstorm a list of all the leadership responsibilities you could ask volunteers to take on. Remember they will need time to learn and practice, so create opportunities at various skill levels for volunteers with different campaign experience. Perhaps it's researching donors for your candidate, or managing the office, or collecting and collating press coverage online and offline. The more roles you have the more leadership capacity you can absorb.

## SETTING UP DATA AND TECHNOLOGY

You will need to have a deliberate plan about where data is stored at the start of your campaign. An upfront investment of a few hours to set up data management systems will save you many, many hours later.

Your priorities should be:

1. Finance data – donors and contributions; online and offline. Track name, phone, address, email, pledges, sources of pledges (email, event, mail), and any legally required information for your race.
2. Voters—a system for tracking which voters support your candidate, which are undecided, and which support your opponent. Also track name, address, phone and email.
3. Volunteers – lists of who your volunteers are, how they are willing to help, and what their scheduled volunteer time and responsibilities are. Track name, address, phone, email, shifts scheduled and shifts completed.
4. Email – Collect emails from every supporter possible.

Spreadsheets (online or offline) are essential to keeping lists until you find another data storage solution for them, but this is not a long-term solution. As soon as you have funding or access, set up your VAN (Voter Activation Network) account, your finance database and your email database and upload all the data you've been tracking.

## CREATING AN ONLINE PRESENCE

You'll want to establish a basic online presence as soon as you get started. If you are working with a party committee, they will have suggestions or recommendations about creating your online presence.

### **Purchase a website name**

This is typically something like "CandidateNameForCongress.com", "CandidateName.com" or "CandidateFirstNameforSenate.com". At minimum, the domain name should include part of the candidate's name. Do not over think this step. If someone owns the website name, pick another. Don't pay a huge amount for it. Make sure you set up your account so that it will automatically renew. You don't want to lose this website name once you have it.

### **Set up email addresses for yourself and the candidate**

This can be your first name plus the domain name, such as fred@susanforsenate.com or the first initial and last name of the individual and the domain name, like sfreeman@susanforsenate.com.

### **Create or update your campaign website with basic information about the campaign and candidate**

A simple website with a professional-looking, high resolution photo of the candidate, his/her bio, a place to collect email addresses and a way to contribute are all that you need to get started. Websites can seem complicated if you don't consider yourself technologically savvy, but if set up correctly, they can be very simple to update quickly.

### **Be sure you're set up to collect online and other credit card contributions**

Being able to accept online contributions is vital to have set up early.

### **Be sure you have a volunteer sign-up process on your website.**

Anyone who's proactive enough to be checking out your candidate online is a volunteer prospect early in the campaign. Give them a way to sign up.

### **Be able to send email messages to large lists of people, including previous supporters or members of the press**

You don't want to be sending emails to large lists of people from your personal email account. Any list over 40 should be sent through a tool designed to handle bulk email.

### **Start to create a presence on the rest of the Internet**

You may not do too much with these right away, but it's important to have these accounts set up to establish your presence:

- Create a Facebook and MySpace page
- Set up a Twitter account
- Set up a YouTube channel, to post video clips of candidate speeches and media appearances
- Set up Daily Kos account



## BUILDING YOUR TEAM

### **HIRING STAFF**

As a campaign manager, the choices about who and when to hire are among the most important decisions you will make. While there is no magic formula for selecting team members, here are some key considerations and questions to keep in mind.

#### **Get the help you need, but follow your budget and your plan**

Hiring staff before you can afford them can be a costly mistake. Like everything else on the campaign, stick to your budget unless your strategy shifts and you have adjusted your budget and cash flow to reflect the new staffer.

#### **Make sure your team is well-rounded**

Campaign managers typically come out of communications, field or fundraising. When hiring, make sure you are comfortable with the leader that represents your blind spot or area where you have the least experience. For example, if you don't have much communications experience, you will want to hire a strong Communications Director since you won't be in a good position to offer much training, coaching, or even strategic advice. Always keep in mind when you budget that you will need to plan to spend more for more experienced and talented staff—plan accordingly.

#### **More experience isn't always better**

What is most important is the right type of experience, and the person's commitment to work hard and enthusiastically to get the work done right. It's often more difficult to retrain someone with bad habits than to train a person with no experience but the right attitude.

#### **Commitment and motivation count**

Campaigns are not the place for ambivalence – the hours are too long and the challenges are too trying for people who are not fully committed to winning.

### **Account for the position in your budget**

Be realistic about what kind of applicant you can get for the salary you have budgeted, or at the very least be ready to beg someone to do you a favor and take a pay cut. Remember: do not exceed the salary range in your budget without adjusting cash flow or cutting from somewhere else.

### **Decide what the job is and write a job description**

#### *Skills and knowledge*

Be very clear in your own mind about what skills or knowledge someone needs to get a job done. For instance, if you are hiring a Finance Director, you need someone who knows how to write a finance plan, run call time, set up events, and manage finance assistants. Unless you have the time to train someone (which you usually don't), you can't just find a smart person off the street. On the other hand, a good Field Organizer or Finance Assistant can be fresh out of college with no campaign experience. What matters most for their job is that they are smart, energetic, detail oriented, and highly committed.

#### *Responsibilities*

Decide exactly what this person will be responsible for: what goals on the campaign are they accountable for reaching? What functions on the campaign do they supervise? What staff are they responsible for hiring/managing/firing? To whom do they report? What metrics are they expected to report and how regularly?

#### *Write a job description*

You will want two descriptions: the one you use to market the job in emails and job postings and the one you give to someone when they start the job. Your public description should include information on the campaign, a little bit about the responsibilities of the position, and information on the skills and knowledge required to do the job. Remember, you want your public description to attract the best and the brightest, so make sure it creates a sense of excitement about the job.

The formal job description should very clearly lay out the responsibilities of the job, with special attention to the goals the employee is expected to meet, what functions of the campaign they are accountable for managing, and what/when they are supposed to report.

### Build a strong pool of applicants

Don't settle for second best. Take the time to identify and recruit the best candidates. Use these tips to guide your search.

#### Tips for Building a Strong Applicant Pool

Most hiring mistakes occur not because managers select the wrong person, but because they can't find the right candidate to begin with. Here are a few tips to help you build a strong pool and avoid that trap.

##### Mass-marketing:

- Contact friends, colleagues, and staff members whom you trust and ask them to circulate the announcement
- Submit posts to job sites (including [www.democraticgain.org](http://www.democraticgain.org); [www.idealists.org](http://www.idealists.org) ; [www.jobsthatareleft.org](http://www.jobsthatareleft.org))
- Use job banks at your state party, or other party committees

##### Individual headhunting:

- Ask friends and colleagues for specific people they have worked with and would recommend for the position
- Ask your consultants for strong staff from other campaigns they have worked on.
- Call colleagues at the state party or other local party organizations and ask about people who were working locally on a campaign (someone who was a finance assistant locally during the last cycle could be a great Finance Director for you this cycle)
- Identify other local campaigns (electoral, labor, issue) that will be finished before or when you are looking to hire.

*Adapted from Alison Green and Jerry Hauser, [Managing to Change the World](#)*

### Screen applicants and interview

Start with a round of phone interviews and pare your list down to few people for a second round. You may not have the luxury of an in-person interview if applicants are coming from different parts of the country. For important roles like Finance Director, Communications Director, or Field Director—and depending on the strategic importance of the position and your distance from the applicant—you may need to pay for the applicant to travel. Think ahead of time if this will be necessary so you can plan for the extra time it will take.

### *Sell the position*

You will need to motivate the best candidates to come work with you—practice your pitch and build a sense of excitement around the campaign and the job. This isn't any old job, or any old campaign, and you're not any manager.

### *Probe prior experience*

Avoid asking "can you do this" or "could you handle this" (because guess what the applicant will say!). Rather ask what they have actually done in their prior job, for instance "tell me about your last job...tell me how you handled a situation like this".

### *Exercises*

If a particular skill is important, test it. If you are interviewing a Communications Director, send them some talking points and ask them to send you a statement within 30 minutes. If you are interviewing a Finance Director, send them the name of a donor and ask them to send you a detailed call sheet in 45 minutes. If a skill is important, test it.

### **Check references**

Always check references. Don't just limit yourself to the references you are given—call friends and colleagues to identify other people who may have worked with the job candidate.

Make it easy for references to be honest with you—instead of asking "would X be good at this job", ask "what sort of position(s) do you think X is best suited for?" or "As X's manager, what sort of development would I need to focus on most?"

### **Make a decision and make an enthusiastic offer**

When you have decided whom you want to hire, call them, or meet with them and make a clear offer: the job title and role, the salary, start date, and any benefits. Put the details in writing on paper or in an email so there is a clear record of what was offered. Also make sure counter offers are recorded as well.

SELL, SELL, SELL. The best managers get great people for a great price. Your most desirable applicants will likely have a number of opportunities, and your campaign will most likely have the lowest salary and the toughest workload and hours. If you want someone badly, you're going to need to sell them on the job, so think of your offer as a pitch, not a favor. Replace what you might lack in salary with inspiration—make sure to explain WHY they should come work on your campaign, not just what they'll do.

### **Have your new hire sign a job description and employee agreement**

Employee agreements help you reinforce working norms that may be standard practice for campaigns (such as not talking to the press unless authorized to do so, etc), as well as norms that are standard to the modern workplace, such as forbidding sexual, racial, and other harassment. The agreement gives you legal cover if you need to let someone go for inappropriate behavior (such as harassment) or misconduct (such as talking to the press).

An employee agreement is especially vital if you have large numbers of staff (such as canvassers) and may have cause to let people go on a regular basis.

### **HIRING CONSULTANTS**

Hiring the right consultants, like hiring the best staff, will be one of the most important things you do on the campaign. Great consultants can be the difference between winning and losing. They can provide enormous amounts of experience, expertise, and motivation to you, your candidate, and the campaign. In the case of media, polling, mail, as well as phone, web, and other consultants, their work product is indispensable to the campaign. Building a good consulting team is vital to your campaign and it should be done with the same care as hiring staff.

On a typical campaign you will hire a media consultant to oversee your paid media; a pollster; a mail consultant; and a web firm. Other campaigns will hire general consultants to help campaign managers determine what their consultant team should look like, and to provide broad strategic advice or help with political outreach.

But before setting out to hire a consultant, you should ask yourself three questions:

1. Do you really need the consultant's service(s)? Is the service vital to your strategy?
2. Can you afford to hire a consultant? Does their fee fit within your budget? What else are you sacrificing to hire this consultant?
3. When do you need to hire the consultant? You always want a consultant (like any member of your team) to start on the campaign as early as possible. If the consultant is paid monthly or weekly, the earlier you hire them, the more they will cost. If they charge you based on their work product, regardless of when you hire them, get them on as early as possible to get their help as early as possible.

### **Pitching**

Whenever possible, you should have multiple people or firms pitch you for the same service, so you can choose the consultant/firm that best matches your campaign's needs and values. Before sitting down for a pitch, you need to do some homework.

### **Know what you're looking for in a consultant**

What particular strengths do you need your consultant(s) to have? You might need regional experience; experience with a particular type of campaign; or experience working with a particular type of candidate. Consultants bring different skills, experiences, and personalities, just like managers.

### **Know what you can afford and what you should pay**

Understand the pricing structure that a consultant is using and be ready to ask specific questions about what their price structure will be. Know what your budget says you can afford and get advice from colleagues on what aspects of pricing you can negotiate on.

### **Know who you are talking to**

Make sure you and your candidate have done some research on the consultant. Get input from others on their experience working with the consultant, look at their past work, know something about the previous campaigns they have worked on.

### **Before you sign a contract**

Negotiate a reasonable price that fits within your budget. Don't be shy; it's your job to negotiate.

*Get a copy of the proposed final contract and read it.* Understand what you're paying for and how much it costs. Consultants use a number of different payment plans. Most charge a standard fee for their product: media consultants take a percentage of the media buy, mail consultants take a percentage of each mail piece, pollsters charge a certain amount per poll, etc. Keep an eye out for fees added at the beginning or end of the consultant's service, such as win bonuses and signing fees.

Circulate the contract to colleagues and ask for their input. Have your lawyer look over the contract. Make sure your candidate understands the financial obligations of the contract. Make sure the contract will work within your budget and cash flow.

## CONCLUSION

The time and intentionality you invest early on in setting up sound systems and hiring the right people will pay dividends when it matters most to your campaign.

You'll find tools and samples on the following pages to help you set up your own campaign systems.

## SAMPLE CALL SHEET

01/12/10 (date created)

**ASK AMOUNT \$1,000****Zoe Markham**1402 Emerson Street, NW  
Washington, DC 20011**Home phone:** (202) 543-1361**Fax:****Mobile phone:** (202) 744-0893**Work phone:** (202) 223-8885**Email:****Employer:** The Campaign Workshop**Title:****Notes:** Do not call Zoe until 2010 because of travel in December**Contribution History**

Date	Amount	Cycle	Period	Source
11/14/09	\$1,000.00	2010	Primary	dc lunch
10/01/08	\$1,000.00	2008	General	dc lunch
06/13/08	\$1,000.00	2008	Primary	women's lunch
03/26/08	\$1,000.00	2008	Primary	

**Pledge History**

Date	Amount	Period	Source	Type	Paid
10/31/09	\$1,000.00	Primary	dc lunch	S	\$1,000.00
03/14/08	\$1,000.00	Primary	call time	H	\$1,000.00

**Pitch**

Zoe is a previous donor who needs to understand the challenge you face this year. When you spoke with her last year, you didn't know who your opponent would be.

**Comments**

Zoe used to work for EMILY's List; husband does immigration policy

**Follow-up****Submitted By:** \_\_\_\_\_**Completed By:** \_\_\_\_\_



## SAMPLE CALL TIME SCRIPT

Steps in a fundraising ask:

1. Establish rapport
2. Tell them how they benefit
3. Prove you can win
4. Research and begin prospecting affiliated network
5. Get donor invested
6. ASK AND BE SPECIFIC
7. Zip it up and listen
8. Collect
9. Show appreciation
10. RESOLICIT

Sample call time ask:

Hi, Zoe, this is Belle Weather. How are you? It's been a long time since we've spoken. You've been such a great supporter but I only see you across the room at those big DC events. How are you? How was your trip last month?

Obviously, you have been aware of the work I've been doing in Congress. The new news in this race is that I now have an opponent and the opposition is really targeting this race. He has a clear record of not supporting basic women's rights....

We actually haven't done our baseline poll yet but did you see the recent numbers in the news? People who know me have a positive view of the work I've been doing in Washington.

The problem is that it's hard to reach people that don't know who I am. It's such an expensive TV market, I really have to find other ways to communicate with voters. So we're going to be running a much more extensive field operation this time. Of course, that takes more money up front, but I think it will be very effective. I've hired a former Obama state director as my manager.

You've been so helpful already this cycle, do you think you could contribute another \$1,000 this month?

## SAMPLE CALL TIME TRACKING SHEET

Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Date	Time of Day (morning, afternoon, evening)	Hours Scheduled	Hours Completed	Connects Made	Messages Left	Hard Pledge	Soft Pledge	Declines	Total Raised
Weekly Total									
Monthly Total									

## SAMPLE CANDIDATE SCHEDULE FOR EARLY DAYS

- 7:30 am Staff to pick you up at home  
Alicia Woodward, Mobile: (202) 555-1212
- 8:00 am Fundraising breakfast with labor unions  
Teamsters Local 431  
555 East Rich Street, Columbus 43215  
Phone: (614) 228-6492  
Contact: Sherry in Tony Jones' office  
Alicia will staff you  
(see attached invitation)
- 9:00 am Depart for HQ
- 9:30 am Call time at campaign HQ
- 11:30 am Depart for lunch
- noon Lunch with prospective donor, Donna Foley  
Olive Garden  
1250 POLARIS PARKWAY, COLUMBUS 43240  
(614) 885-0080  
(see attached call sheet)
- 2:00 pm Call time at campaign HQ
- 4:00 pm Interview with the Los Angeles Times  
By phone (213) 237-5000; YOU CALL THEM  
Jim will come over and brief you before the call
- 4:30 pm Call time at campaign HQ
- 6:00 pm Depart for event
- 6:30 pm Fundraising event with progressive organizations  
Home of Les Wexner  
New Albany, OH  
Phone: (614) 628-4160  
Contact: Kim in Wexner's office  
Alicia will staff you  
(see attached invitation for host list)
- 8:00 pm Depart for home

## SAMPLE CANDIDATE SCHEDULE FOR EARLY WEEKS

### **Monday**

Breakfast with business leaders  
Work  
Call Time

### **Tuesday**

Breakfast with labor leaders  
Work  
Call time  
Work  
Reception with progressive organizations

### **Wednesday**

Breakfast with constituent group  
Work  
Call time  
Work  
Dinner with family

### **Thursday**

Breakfast with women members  
Work  
Caucus lunch  
Call time  
Work  
Dinner  
Call Time

### **Friday**

Haircut with Latifah  
Work  
House party with supporters  
Attend local h.s. basketball game

### **Saturday**

Breakfast with kitchen cabinet  
Town hall meeting at local library  
Lunch with potential donors  
Visit local VA hospital  
Call Time & Donor one-to-ones

### **Sunday**

Church  
Local historical society even

