Overview

1. Assessment
2. Setting a vote goal
3. Starting your team
4. Developing and integrating a budget, communications, and voter contact plan
5. Growing your team
6. Execution
Assessment

- Assessing yourself
- Assessing your resources
- Assessing the field
- Assessing the electorate
- Assessing the political environment
- Assessing the rules
Assessing Yourself

● What is your story?
● What is your personal situation?
● What are your goals?
● What are your strengths?
● What are your liabilities?
● Who is your network?
Assessing your Resources

- What kind of financial commitment can you make to your campaign?
- Who in your network can you ask for money?
- Who in your network can you ask for advice?
- What will be the role of caucus committees?
Assessing the Field

- Who else is running or likely to run?
- How do you fit into and stand out from the field?
- What are your opportunities to draw contrasts?
- What are your opponents liabilities?
- What kind of resources will your opponent have?
Assessing the Electorate

- Who lives in your district?
- What type of cycle is it and how will that impact turnout?
- Who are YOUR voters?
- Who AREN’T your voters?
Assessing the Political Environment

- Who has a stake in your election and where do they stand?
- What exterior forces are at play?
- What other races are going on and what impact will that have?
- What is the level of media interest in your race?
Assessing the Rules

- Who is eligible to run?
- How do I form a political committee in this jurisdiction?
- What campaign finance rules govern this office?
- How do I gain access to the ballot?
- How is the winner determined?
Setting a Vote Goal

- Use historical data from like elections to approximate turnout
- Consider novel circumstances that may change historical trends
- Set win number
Starting Your Team

- Advisors
- Senior staff
- Donors
Advisors

- Your network
- Caucus committees
Senior Staff

- What to look for
- Setting expectations
- Duties at this point:
  - Developing a budget, communications, and voter contact plan
  - Fundraising
Donors

● Your personal network
● Institutional donors in district/region
● District Stakeholders
● Office Stakeholders
● Interest PACs
● Issue PACs
● Identity PACs
Developing a Budget

- Brainstorm potential donors and set target contributions and likelihood to give
- Try to raise more than your target, but assume you’ll raise less
- Determine fixed costs and estimate variable costs based on communications and contact plans
- **Sample Budget**
Developing a Communications Plan

● What is(are) your message(s) and how can they be delivered effectively?
● What resources can you devote to communications?
● What is the nature of your media market and where do you fit?
● Is earned media realistic? if so how do you maximize it’s potential?
Developing a Communications Plan

- Media Mix
  - Earned Media
  - Broadcast TV
  - Cable
  - Mail
  - Social Media
  - Online Ads
Developing a Voter Contact Plan

● Targeting
  ○ Demographic
  ○ Geographic
  ○ Phone Universe
  ○ Door Universe
  ○ Mail Universe

● Delivery
  ○ Volunteers
  ○ Paid

● Contact
  ○ Identification
  ○ Persuasion
  ○ GOTV

● Methods
  ○ Canvassing
  ○ Phonebanking
  ○ Events
Integrating your Plans

- Determine fundraising target
- budget fixed costs
- Develop communications and voter contact plans in light of resources available
- budget variable cost broadly by category
- refine media mix and contact allocations with expert assistance
Growing Your Team

- Staff
- Vendors
- Volunteers
- Supporters
Staff

● Staff roles
  ○ Campaign Manager
  ○ Fundraiser
  ○ Communications
  ○ Field
  ○ Scheduling
  ○ Policy/Research

● Size and scope
  ● Finding staff
Vendors

- Polling/Research
- Fundraising
- Mail/Printing
- TV
- Communications
- Targeting
- Voter Contact
Volunteers

- Personal Network
- Extended Network
- Local Party Committees
Supporters

- Personal Network
- Engaged community members
Execution

- Follow your plan
- Regularly reassess
  - Daily budget review
  - Danger days
- Consider the whole picture when making adjustments
Resources

- **NDI Campaign Planning Manual**
- **Progressive Majority Targeting and Voter Contact Presentation**
- **Candidate Project Campaign Budget Guide**

NOTE: Some of the resources linked to above are presented from a partisan perspective, however they are included here because they include useful information on various aspects of Campaign Plan development, regardless of party.