DEMOCRACY ★ FOR ★ AMERICA
CAMPAIGN ACADEMY

Chapter 4:

Field Organizing

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 an 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, a campaign should 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 win number – your campaign's overarching objective is to reach that number. A good Field Director will memorize this number early in the campaign.

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 prioritize those voters who are most likely to vote (and vote *for* your candidate!) 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 from 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 2008, 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 2009 or 2010, 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 non-competitive races create lower voter turnout. The key to projecting turnout using past elections is to compare *similar* past elections.

Again your county elections official or Secretary of State are the best sources for information about turnout percentages. Sometimes it can be difficult to find a past election similar to the current one. In these instances you have to think creatively and compare multiple elections to inform your turnout prediction.

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**

Win Number:

>   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 votes. 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 using geographic trends, targeting using voter history, and targeting using 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 we do. But when considering a campaign's limited resources, it makes sense to utilize the strongest precincts and spend 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 precinct or district 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 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 Republican vote in Republican 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 or even opposition districts.

Targeting with voter history

Most districts' voter rolls will show with which Party a voter is affiliated and if/when that voter has voted in the past. This information is public. 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-year elections.

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 Get Out The Vote (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 Identifying (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 need to spend 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 should not spend resources on these voters.

Partisanship

Turnout	Strongly Supports (1)	Undecided (2, 3, 4)	Strongly Opposes (5)
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

Identifying the voter's past performance answers the question of which behavior to influence. Frequent voters will likely show up for 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 these supporters vote. What can you tell about the voters below?

	2006 Primary	2006 General	2008 Primary	2008 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 is the most likely to vote in the 2008 Primary?
Who is the most likely to vote in the 2008 General?
Who is least likely to vote?

Using 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 the telephone or speaking to them face to face, a campaign can determine how likely they are to support a specific candidate, party or issue. As you contact more voters and update your voter file, it becomes possible to target specific voters based on how frequently they vote and for whom they usually vote.

In 2005, then DNC Chairman Howard Dean invested in a single online voter file for the Democratic Party. This voter file (commonly known as **VoteBuilder**) is made available to all state parties by the Democratic National Committee. Rules for accessing VoteBuilder vary widely from state to state and there are a few states where local or private voter files are still widely used. If you are unsure how to get access to a local voter file, you should contact your County Democratic Party.

Targeting with Constituencies

Certain demographic groups (African Americans, Latinos, Jewish Americans, single women, union members, etc.) consistently support Democratic candidates over Republicans. When planning your field program, be sure to consider how you will reach out to these constituencies to build support in their communities. Usually there are already established organizations in your area that represent these constituencies. The key to building support is to reach out to these organizations both early and late in the campaign. If possible, it's good to conduct a baseline poll to identify constituencies where your support is strong or where persuadable voters can be found.

Build Your List - Collect information on organizations you plan to target. Names, addresses and phone numbers of key leaders or officers are needed.

Meet with Key Leaders early - Gaining the support of key members of these organizations is the best way to convince members of these groups to support your campaign. Be sure to stress where your campaign is in support of the group's goals, but be careful not to pander or flip-flop on any public positions you have taken.

Candidate Scheduling - Get your candidate in front of the constituencies you've identified as important to your field effort. Meetings, community dinners, fundraisers, etc. are all ways to expose your candidate to a diverse group of voters.

Endorsements - A public endorsement is a great way to gain support through constituencies. Make sure that the organization is communicating the endorsement to their members.

Niche Media - Many constituencies have specific media platforms that are trusted conduits of information for the community. Local newsletters and radio are particularly useful. Make sure your Earned Media plan targets these media outlets.

Part 3: Contacting Voters

Once the campaign figures out where to go and what to say, the campaign needs to figure out how best to reach the voters. The campaign will have a menu of techniques for contacting voters. All of these techniques should have one or more of the following goals:

- Identifying supportive, undecided, and opposing voters
- Spreading the campaign's message to undecided voters
- Increasing the turnout among supportive voters
- Collecting information for future voter outreach efforts

Data Collection

Remember, the goal in any election is to make sure that 50 percent plus 1 of the Election Day voters support our campaign. A well-organized field campaign will track which voters they have communicated with and how a particular person is likely to vote. **Collecting this data is crucial to your voter contact strategy.** Many local Democratic Parties will allow you access to a voter file that combines the publicly available voter registration data with party or candidate preference information from previous campaigns. If no party voter file is available to your campaign, then it is important to create your own system of tracking voters' preferences.

Categories of Voters

There are essentially three groups of voters in any election: **our supporters**, **undecided voters,** and **our opposition**. Unless your local party has a well-kept voter file, you will probably not know which voters belong in which group at the beginning of the election. As you contact each voter you will begin to categorize them as supporters, opponents or undecided. Each of these categories requires a different voter contact strategy.
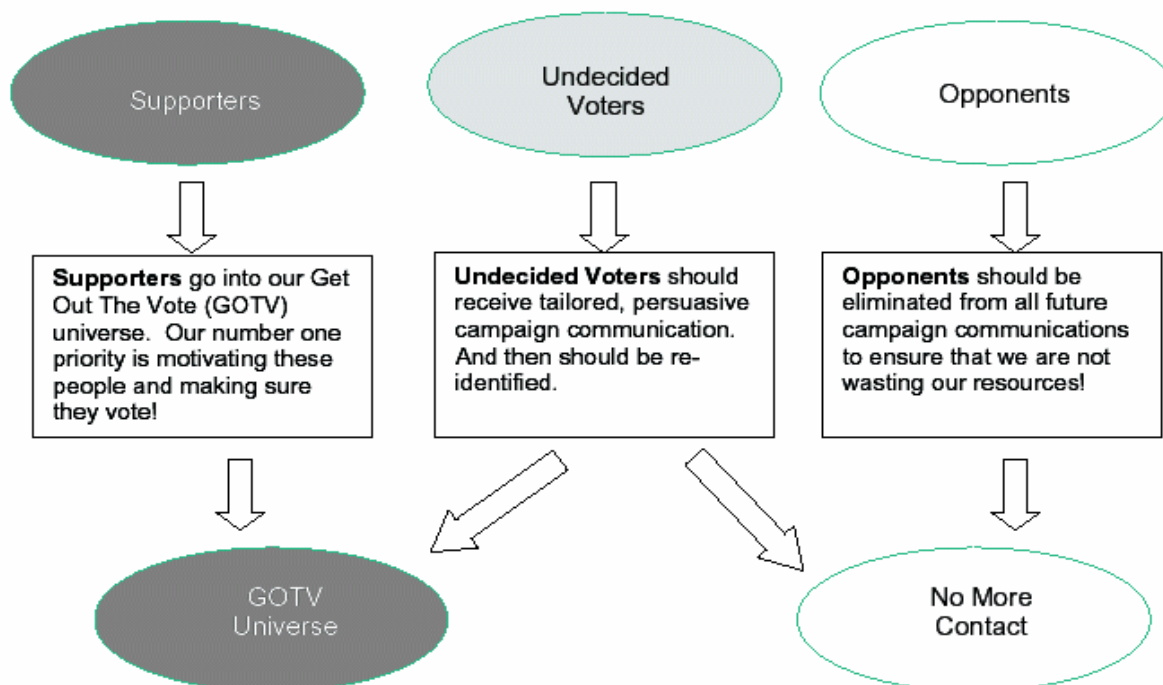
Think of voter contact as a process of refining and re-refining a huge list. The more times you're able to go through your list contacting each voter, the more you are able to tailor a specific message (GOTV or persuasion) to a specific voter.

Types of Voter Contact

The more personal and retail the contact, the greater impact the contact will have. At the same time, making retail contact with each and every person is extremely demanding on your resources.

Voter Contact can be divided into two different categories: High impact and Low impact.

Tactic	Impact	Targeted	Two-Way?	Resource Costs		
				Time	**People**	**Money**
Canvassing	High	Highly	Yes	High	High	Med
Phone	High	Highly	Yes	Med	Med	Low
Literature Drops	Low	Sometimes	No	High	High	Med
Posters	Low	No	No	Med	Med	Low
Lawn Signs	Low	No	No	Med	Med	Med
Billboards	Low	No	No	Low	Low	High
Human visibility	Low	No	No	Med	High	Low
Emails	None	Moderately	Somewhat	Low	Low	Low

In 2000, Yale political scientists Donald P. Green and Alan S. Gerber produced <u>Get Out the Vote!</u>, a book which quantified the effect of voter contact tactics on GOTV. As predicted, the more personal the tactic, the more likely that tactic would produce a vote. As a general rule, Green and Gerber estimated how many contacts each tactic required to turn out each additional voter (GOTV only):

> *Canvassing: One additional vote for every 14 people successfully contacted.*
> *Phone banks: One additional vote for every 35 people successfully contacted.*
> *Literature Drops: One additional vote for every 66 people successfully contacted.*
> *Direct Mail: One additional vote for every 133 people successfully contacted.*
> *Robo-Calls: No discernable increase in voter turnout*

The study indicated that these tactics had greater impact in local (or down-ballot) elections and in mid-year elections. Although these numbers generalize the significant distinctions among different kinds of voters, the research powerfully illustrates the varying degrees of efficacy for each tactic.

What voter contact strategy a campaign employs will be based on resource realities. The most effective impact will come from a combination of techniques, designed to be as personal as possible and related to one another both in message and timeline**.** Effective communication is layered.

> *Example: Layered Communication to Persuade an Undecided voter*

1. **TV and Radio ads** raise voter awareness across a large segment of the population.
    2. **Door-to-door canvass** identifies a voter who is undecided on an issue.
        3. **Direct mail** provides persuasive issue material to voter.
            4. **Phone bank** re-identifies - voter is now in support.
                5**. Election Day direct mail** reminds supportive voter to vote.
                Election Day phone bank reminds supportive voter to vote.
                Election Day doorknock reminds supportive voter to vote.

We will discuss 3 of the most widely used voter contact tactics on the following pages: Canvassing, Phone banking and direct mail.

Direct Voter Contact: The most cost effective tactic for reaching voters

Of all the tactics you can use to get your message out to the voters, nothing has a higher impact or is as cost-effective as direct voter contact though door knocks and phone calls. Canvassing and Phonebanking have long traditions in campaigns and should constitute the cornerstone of any grassroots campaign.

Why Canvassing & Phonebanking?

Is direct voter contact losing its effectiveness? Not according to the most recent studies. Yale Political Science Professors Donald Green and Alan Gerber compared the cost effectiveness of various GOTV tactics in their book "Get Out the Vote!," Here are some of the advantages that Canvassing and Phonebanking provide over other campaign tactics.

1. Higher impact than other campaign tactics
The more personal an appeal to a voter, the more effective the contact has on their actions.

2. Least expensive campaign tactics
Canvassing isn't cheap by any means and has some significant start up costs. However, it is far less expensive than other forms of voter contact such as visibility, direct mail or paid media advertisements.

3. Ability to Target Voters
By using public information such as voter rolls and previous election data, direct voter contact allows you to focus your limited resources on people who are registered and likely to vote.

4. Ability to gather info from voters
Engaging in conversations with voters allows your campaign to gather valuable information about these voters, such as who they intend to vote for and what issues matter most to them.

Canvassing: Rules of the Road

Canvassing is one of the oldest, most versatile and most effective methods of contacting voters. Though it is very time and resource intensive, canvassing is by far the most effective voter contact tactic available to your campaign.

Canvassing is also sometimes known as 'Door-knocking' or 'block-walking'. It is a high impact voter contact tactic because it allows for two-way communication between the campaign and the voter. Television advertisements and yard signs can help get a campaign's message out, but they are easily lost in the daily blur of our commercial culture. A face-to-face conversation also gets a

> **Canvassing**: To solicit political support or to determine opinions or sentiments. To seek votes. A personal solicitation of votes or survey the public opinion.
> **- Webster's Definition**

campaign's message out to a voter, and additionally allows that voter to ask questions about the candidate and express his/her hopes, fears and frustrations about the district and issues that affect his/her daily life. This conversation makes the contact more memorable and thus more likely to influence the voter's behavior on Election Day.

If you are a candidate in a local election, there is no higher impact you can make on a voter than personally knocking on their door, listening to their concerns and asking for their vote.

> **Sample Canvass Packet**
> - List of voters (walk list)
> - Map of the area
> - Scripts
> - Candidate position paper
> - Campaign literature
> - Clipboard & pens
> - Phone # for HQ
> - Bottle of water

Canvassing Preparation

Canvassing is a very resource heavy tactic on people as well as time. Before you can begin to canvass or send others out to do so you need to make sure you know where they are going and what they are going to say when they get there.

This information should be assembled together in a 'canvass packet' before you can begin an effective canvass. A canvass packet has information on the voters who are being targeted, maps of the area being canvassed (also known as 'turf'), campaign literature and scripts.

Be sure that your canvassers are delivering the right message to the right voter. Are you trying to identify and persuade voters or are you trying to remind your supporters to get out and vote?

Your 'canvass packets' should be completed the day before any canvass is to take place in order to ensure your volunteers' time is not wasted and they can move immediately into doing role-plays.

10 Super Volunteer Canvassing Tips:

1. Safety First
Always canvass in teams. Never go inside anyone's house and be careful of dogs! If you have to enter a fenced in area to reach the door, shake the fence first and see if any dogs are waiting for you. Bring doggie treats as a last resort and to earn brownie points with owners.

2. Dress the Part
Check the weather before you leave. Dress appropriately & wear comfortable shoes! Bring snacks and water. Look presentable but casual.

3. Know Your Message
Be a brief speaker and a good listener. Do as many role plays as possible before hand. Have the script memorized so you don't have to read from the sheet and can engage the voter in a conversation.

4. It's Not Only What You Say
90% of communication is non-verbal. Always be smiling when a voter answers the door and look them in the eyes. Take a step back from the door after you knock to allow them to open the door and talk. Try to hand them your campaign literature if they don't open the door at first.

5. Say 'I don't know"
Never guess the candidates position on anything! If you can't answer a question, write it down along with their contact info and then follow up with the voter later.

6. Never Debate
Avoid getting in an argument with a voter in front of their own home. Even if you can win the argument, you'll likely lose the vote. Spend most of your time listening, then pivot back to your message. Spend the most time with people who are open to your campaign instead of hard core opponents.

7. Let Them Know You Were There
If the voter isn't home, write a short note on your literature saying "Sorry I missed you." Leave literature somewhere noticeable (think eye level). NEVER leave literature in the voter's mailbox (this is ILLEGAL).

8. Know Your Environment
Look for clues about the voter from their home (bumper stickers, kid's toys, type of car, etc). Find a way to relate to them!   Show respect by using the sidewalk and not cutting through yards.

9. Move Quickly
The more doors you are able to knock on each hour increases the number of quality contacts you can make. Try to knock on *at least* 12 doors per hour with 5 contacts per hour. Avoid talking to a single voter for longer than 5 minutes.

10. Take Good Notes
The information you collect through canvassing is pure gold to the campaign. Write down anything you think will be helpful (be sure to write legibly so others are able to read and enter the data). After you finish for the day, note each voter with whom you've had a conversation. Write up a quick postcard thanking them for talking with you and asking for their vote.

Phonebanks

Phonebanks are a critical element to any political campaign. They are one of the most inexpensive, effective, and resource efficient tactics to contact voters and deliver your message. Although not as persuasive as canvassing, phonebanks allow you to reach voters that canvassers sometimes cannot due to time or geographic constraints.

Keep Good Records

Keeping accurate records is essential to any voter contact tactic. With the high number of contacts a campaign can make with phonebanks, it's all the more important to record the outcome of each call. Be sure to create clean and easy to understand call sheets and that your volunteers are trained on how to fill them out. Info from the previous night's calls (who is voting with us, who is not, who has a disconnected number, etc) should be entered into a voter file by the next morning.

> **The speed and efficiency of phonebanks makes them ideal for any type of voter contact.**
>
> - Voter Identification
> - Crowd Building for events
> - Volunteer Recruitment
> - Voter Persuasion
> - Get Out The Vote

Create a Positive Working Environment

> **Sample Phonebank Packet**
>
> - List of voters (call list)
> - Scripts
> - Candidate position paper
> - Campaign literature
> - Clipboard & pens
> - Water & snacks

Keep your phonebanking space clean and organized. It should look busy and inviting to any current (and potential) volunteers. Have all necessary calling info ready in a Phonebank Packet for volunteers when they arrive. Be sure to have coffee, water and snacks available at all times. A good phonebank manager will push their volunteers to make more calls while making sure they are having a great time doing so. Think of creative ways to keep the energy and excitement high during any phonebank.

10 Super Volunteer Phonebanking Tips

1. Smile
They can tell on the other end of the line. Keep a mirror handy to check that you're smiling while you talk.

2. Connect
Find ways to relate to the person you are calling. Say your full name and where you are from. Be casual and relaxed.

3. "Ear Glue"
The more calls you can make per hour, the better it is for the campaign. Keep the phone glued to your ear between calls. You'll save time and momentum. Try to make *at least* 30 calls and 10 contacts per hour.

4. Dammit!
Don't sound like you're asking them a question unless you are. (This often happens without you even realizing it!) Think the word 'Dammit' at the end of each sentence to emphasize your point and sound more assertive and declarative.

5. Stand
Standing while you call keeps your energy and enthusiasm high. Move around while you do calls to keep your blood flowing.

6. Be Prepared
Use whatever data is provided about the voter to your advantage. Is the voter male or female? Young or old? Frequent or infrequent voter?

7. Ask questions
Never dominate the conversation. Asking the voter open-ended questions is a great way to get them engaged in a dialogue with you.

8. Listen more than you talk
Along with asking questions, you should be listening to their answers. This is especially important when it comes to persuasion calls.

9. Take clean notes
Every call is helpful to the campaign no matter what the results. Wrong and disconnected numbers will save the campaign time later on. Be sure to clearly mark down the result of every call so it can be easily and quickly read and entered into the voter file.

10. Forget Your Last Call
Don't worry if you get hung up on or yelled at. Brush it off and quickly move onto the next call. Dwelling on negative experiences will make you less friendly to other voters.

Direct Mail

Direct Mail mail is a highly targeted voter contact tactic that can be used for persuasion or GOTV. Although Direct Mail is expensive, it is much less expensive than paid media (especially on TV). For low budget campaigns that cannot afford television advertising, direct mail becomes the primary visual medium to promote your campaign.

Advantages to Direct Mail
Mail can be extremely well targeted. With a good voter file, you can send mail as a follow up to undecided voters contacted at the door or on the phone to tell them your candidate's stance on their most important issue. You can also send reminders to vote to likely supporters in the days leading up to the election.

Direct Mail is also known as the 'Silent Killer' because it is difficult for the opposing campaign to determine when and to whom you sent each piece, making it very difficult to respond.

Don't Go Dark
The key to persuading voters with mail is to repeatedly hammer home the same message until it sinks in. Stick with a single interesting and repetitive message and be sure that once you begin sending mail to your targeted voters, you do not stop until Election Day. Sending a single piece of mail in September won't do your campaign much good.

Will they read it?

The disadvantage of using Direct Mail is that many voters will toss them before reading. Use the following tips to make sure your mail gets read by the voters.

1) Easy on the text - Less is more
2) A picture is worth 1000 words
3) Don't use envelopes
4) No white spaces
5) Make it relevant to them

Part 4: 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?

Setting good benchmarks requires you to know basic information about how quickly your supporters can contact voters. Remember that the number of households to knock or call is not the same as the number of voters in the district. Below are some good rates to determine and some industry standards. Remember though, your race is specific and a number of factors can alter these rates significantly. The best way to establish contact rates for your campaign is to track them yourself.

Good Rates to determine:	**Standard Rate:**
- Voters per household	→ 1.667 voters / home
- Households knocked / hour	→ 8 - 12 knocks / hour
- Households contacted / hour	→ 4 - 6 contacts / hour
- Phone calls/hour	→ 15 - 20 calls / hour
- Phone contacts / hour	→ 7 - 10 contacts / hour
- % of contacts / attempt	→ 50% contact rate
- % Support / Undecided / Oppose	→ 30% - 40% - 30%

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 of your 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.** - **Intro Direct Mail piece drops**	- **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** - **Early Voting GOTV turnout**	- **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**

Get Out the Vote (GOTV)

The GOTV phase of an election consolidates all the campaign work that has come before it. In a closely contested election, a well-run GOTV plan can secure victory for the campaign. The campaign shifts gears in the final weeks to its GOTV phase. GOTV is much more than Election Day.

More and more states are turning to early voting and vote by mail which means that GOTV can begin as early as September. A well run Get Out the Vote Campaign builds on all previous voter contact efforts and is planned months in advance. GOTV plans vary widely from campaign to campaign, but the overall goal is the same: ***Make sure all of your identified and likely supporters vote.***

> It is often said that GOTV can impact a race by around 2-5% of the campaign's turnout.
>
> Of the Democrats' 31 Congressional pick-ups in 2006, 13 races were within 5% of the vote.

Before GOTV Can Begin

The months of work on the campaign's field plan all lead up to the final weeks of the campaign in the GOTV phase of the campaign. Because of this, a number of benchmarks must have been hit before GOTV even starts.

Many campaigns see GOTV planning as a process that begins near to the election. But well-run campaigns create their entire field plan with GOTV in mind from the beginning. The GOTV plan needs to be made with information gathered from months of work in the field program. The field plan needs to be built with GOTV considerations in mind. The GOTV plan incorporates information such as the locations and characteristics of supporters and likely supporters. The GOTV plan will also need to prioritize groups of supporters and the precincts they live in. Because of this, the field plan has to start with a goal to identify and/or persuade a certain number of supporters and it must track these supporters on a precinct level.

In other words, the GOTV program relies on a list of supportive voters. Building this list is the job of the field program until GOTV begins. Once GOTV begins, the campaign is focused on turning the people on that list out to vote.

If this list is incomplete by the time GOTV contact starts, the GOTV plan will be less effective.

Goal Setting and Targeting Your 'GOTV Universe'

You've already calculated your 'win number' (50%+1 of est. turnout) and your 'vote goal' (52% of est. turnout). These numbers formed the basis of your field plan in the previous sections. These numbers and the work you've done in the field plan will now form the basis of your GOTV plan. There are two targets for your GOTV efforts: 1) Identified Supporters and 2) Democratic Base Precincts

1) Most of your voter contact efforts should be targeted at 'Swing' precincts (35%-65% Democratic Performance). Every supporter you identify in a swing district should be placed in your GOTV universe so that you can ensure they turn out to vote.

2) Look at your Democratic Base precincts (Democratic performance = over 65%). You spent time early in the campaign building a name for yourself among your base, but paid far more attention to the swing precincts for most of the rest of the campaign. Now it's time to go back to your base. Judging by democratic performance and likely turnout, how many votes can you expect from these precincts?

Purchase a precinct map from the local county elections official to help with your targeting. Color your base precincts blue and look for clusters where you can turnout large numbers of voters with fewer resources.

Add these two numbers – ID'd supporters and Base voters – together. This is your 'GOTV universe.' If you live in a Democratic area, or if you've run an aggressive field program, you might find that your base voters and your ID'd supporters meet or exceed your vote goal. You will want to build a GOTV contact plan for your voters, broken down by likelihood of voting. Somewhat likely voters get more contact than very likely voters.

What if your GOTV universe isn't large enough?

We'd like campaigning to involve very little guesswork. That's why it is so important to run an aggressive field plan: The more supporters we ID and persuade, the less guessing we have to do as the campaign enters its final weeks. Unfortunately, not all campaigns are not able to reach their vote goal through ID's and existing base voters. For these campaigns, we will need to figure out how to increase the size of our GOTV universe in a way that produces more votes for the campaign.

1) Turning out potentially supportive, but infrequent voters

Take another look at the high Democratic performance precincts. We determine our turnout projections in these precincts based on previous performance. If the turnout in Democratic base precincts was increased above its expectation, the campaign would receive more votes. Focusing on increasing turnout in high performance/ low turnout precincts is a resource-intensive strategy. These precincts usually have low turnout for a number of reasons – reasons which previous campaigns did not overcome. The precinct could have high residency turnover, inaccessible households, individuals working numerous jobs, etc. If the campaign decides to target these voter/areas, the campaign should take a look at the factors which lead to low turnout in the target areas. The campaign must develop a plan for contacting these voters. That plan must begin with a goal of how many more voters the campaign can turnout (usually on a precinct by precinct basis) with increased contact activity. This number is often calculated as the 'GOTV index.'

If thought out in advance, this strategy will produce an increased number of supportive voters. The increase comes at the expense of more time, money and people used to contact these voters.

2) Turning out likely demographics

Sometimes you just have to guess. At least make it an educated guess. If you have objective information stating that a certain kind of voter is very likely to support your candidate, you might decide to add all of that kind of voter into your GOTV universe, including unidentified voters. This most likely occurs if the campaign has access to polling information indicating the inclinations of specific demographic groups. The pollster might find that two-thirds of women under the age of 50 support your candidate. In this case, your GOTV plan would be wise to add all female voters under the age of 50 to the GOTV universe. Do not add in groups of voters to your GOTV universe without reliable, objective information. "Hunches" are not the foundation of a GOTV strategy.

If done with reliable information, this strategy can be a huge help in building a GOTV universe. It relies on having a detailed voter file (including age, race, sex, income, etc) and an objective source of quantifiable demographic inclinations.

3) Turning out supporters in hostile territory.

There are reasons we do not spend much time in Republican base areas. Untargeted turnout work is likely to produce more opposing votes than supportive, and targeted turnout work is more expensive on a per voter basis. If, by GOTV time, your campaign is unable to build an adequately large GOTV universe by targeting base precincts, ID'd supporters and supportive demographics, the campaign might decide that targeted GOTV work in Republican precincts will be necessary.

This strategy is risky because Republican base areas do not need any reminders that there's even an election in progress, much less that there's a Democrat running. GOTV in these areas is risky, expensive, and potentially frustrating.

Research and Reach Out

Election laws differ from state to state and have changed recently in many parts of the country. Administration of these laws may even vary from county to county. The importance of researching election law and regulation can not be understated. The campaign should understand voter registration timelines, absentee and mail-in voting regulations, early voting, poll checking rules, poll opening and closing times, peculiarities of different voting machines throughout the district, etc. Election information is usually kept by the state Secretary of State and administered by the individual counties or county organizations (Clerk, Board of Elections, etc). On Election Day, the individuals overseeing the polling station might not be well-versed on election law, especially due to the recent and numerous changes in the law in the last few years. The campaign should have a legal team available to troubleshoot and anticipate potential problems. Seek out local attorneys who have experience in this area.

Chances are, in GOTV, it's all been done before. Just as during the start of the campaign, the GOTV phase of the campaign will benefit from having reached out to other campaigns, previous campaigns, and the existing Democratic Party infrastructure. Local groups and activists who have worked in the district in past cycles might be able to share their experiences with the campaign.

Additionally, many campaigns will work in the context of the state's Democratic Coordinated Campaign. The state Party usually pools resources and data from Democratic campaigns running in the state in that cycle. Most of this coordination is done between the largest campaigns (statewide and Congressional campaigns), but can be useful for down ballot campaigns as well. Be sure to ask the state's Democratic Coordinated campaign what it can share with your campaign. The coordinated campaign can be a huge help for GOTV.

Staffing

As the campaign transitions into its GOTV phase, your staffing structure will begin to change. The campaign will require increasing amounts of staff time and resources spent on GOTV. Most of the staff will switch over to GOTV work. In the final days of GOTV nearly all the staff has switched over with the possible exceptions of only the scheduler, the communication director, and the finance director in their original roles.

Many campaigns will bring on a dedicated GOTV director to plan and execute the GOTV phase, others will transition the existing field director. Having a fresh staffer on the ground who is not distracted by anything other than the needs of the upcoming GOTV phase can be a huge help when the campaign needs to transition into GOTV. Researching, planning, and preparing for this final phase of the campaign is a major undertaking and needs to begin well in advance of the election. The new GOTV director needs to learn about the district and the campaign's work up to that point in a short amount of time. Additionally, the new GOTV director will need to jump into an existing staff and establish new accountability and reporting procedures.

Whether the campaign has the ability to bring on a GOTV director or decides to use the existing Field Director, the campaign must have a clear system of who is accountable to whom for the final GOTV phase. As more staff members are added and existing staff is shuffled, everyone should be clear on what is expected of them and from whom. As the campaign nears the final stretch, the GOTV director's responsibilities become increasingly greater, as does the number of staff that report to him or her.

Prioritize, Evaluate, and Revise

As with any project where your resources are limited, smart prioritizing is the key to successfully reaching your goal. In GOTV, you prioritize voters and the precincts they live in. Much of the GOTV work the campaign will do utilizes three main tactics: **door-knocking**, **calling**, and **mailing**. The key to distributing these tactics efficiently is to figure out which voters and which precincts get canvassed, called, and mailed for GOTV.

As stated earlier, your GOTV universe consists of people reliably identified or presumed to be supporters of the campaign. Among these supporters, some voters will require more contact than others. Among those same supporters some may need to be contacted by different methods and will require varying levels of resources.

Prioritizing by Voter Behavior

Frequent voters require relatively little contact. This group of voters should still receive some contact before the election and should certainly be included on Election Day GOTV voter contact lists.

Infrequent voters will require much more contact. These voters should be contacted in a number of different ways – phone, canvass, mail, lit, etc – before the election. They have a record of missing some elections, so it's worth making sure they know this one is important.

Prioritizing by Precinct

Every vote counts equally once it has been cast. But getting that voter to cast the ballot is not equal in terms of the resources required. Some precincts may be more difficult for a person to access on Election Day. The campaign will emphasize phone and mail outreach for these voters.

Some precincts have more GOTV targets than others. Because you have limited resources, it will be important to target the precincts with the highest number of GOTV targets, especially for Election Day when the campaign must distribute canvassers. An hour spent by a canvasser in a GOTV dense precinct will produce more than an hour spent in a precinct where there are fewer targets. Large Democratic Base precincts will almost certainly have the greatest number of targets, followed by swing precincts in which the campaign has done its most aggressive voter ID and persuasion work.

Example: Prioritizing Precincts for GOTV				
Precinct	Perf.	Voters	**GOTV**	**Rank**
Pct 5-1	Base	315	**201**	**1**
Pct 5-2	Base	283	**183**	**2**
Pct 5-3	Base	194	**177**	**3**
Pct 5-4	Swing	406	**166**	**4**
Pct 5-5	Base	135	**109**	**5**
Pct 5-6	Swing	281	**106**	**6**

On Election Day, the campaign will distribute volunteers to precincts in the order in which they are prioritized. Priority precincts will be covered throughout the day, pulling out all the voters in the precinct team's list. If a volunteer lives in a priority precinct he or she should work in his or her home precinct, but this should be worked out beforehand for priority precincts. Avoid sending volunteers to non-target precincts until all target precincts have been filled. It's tempting to send volunteers wherever they want to work, but unless they refuse to work anywhere else, priority precincts must be covered before non-priority precincts are considered.

GOTV Tactics

GOTV contact carries a specific message - "Vote!" - and repeats this message many times over a short period of time. Generally, the more contact a voter receives, the more likely it is that voter will turn out and vote. At times this may seem to temporarily frustrate the voter, but the relationship between number of contacts and turnout is solidly in favor of repeated contacts. This is especially true of infrequent voters. Ultimately, the best way for a voter to end contact from the campaign will be to get out and vote.

There are two types of GOTV tactics: *High Intensity* and *Low Intensity*

High Intensity GOTV Tactics

The more personal the GOTV contact, the better the response. More personal forms of contact, such as canvassing are necessary but also resource intensive.

Door Knocking - the canvass

Contact for contact, door conversations yield greater turnout than any other contact. It's easy to throw away a piece of literature or even cut short a phone call, but a cheery and persistent volunteer is difficult to ignore or dismiss. That said, canvassing is by far the most labor and time intensive form of contact. An efficient canvass operation requires advance material preparation, adequate volunteer training, and a system of volunteer supervision.

Training for GOTV canvassing needs to be made mandatory even for veteran canvassers. The campaign should arrange for a number of meetings around the district to serve as a canvass briefing and training.

The canvass coordinator might choose to cluster precincts together if the campaign has many precincts to cover or not very many volunteers. If so, be sure to separate base precincts (blind-pull) from swing precincts (targeted GOTV). It will unnecessarily complicate matters if a volunteer team assigned to more than one precinct needs to execute different GOTV strategies.

A key procedure for GOTV on election is a voter turnout reporting system. Work out a plan so that the campaign knows throughout the day when its targeted voters have cast their ballots. Many counties allow the campaign to copy a list of voters who have shown up. The campaign will want to check that list against its own list of targets. Those identified voters who have cast their ballots should no longer receive GOTV contact. Focus your resources on those who have not yet voted. At appointed times in the day, your precinct team will check on that list and transmit that information back to their HQ or staging area.

A quality canvass program requires supervision. By the time GOTV commences, the campaign will have recruited a number

> ### Be Prepared for Bad Weather
>
> **Rain**: Clear plastic cover sheets, found in a school supplies section of any store, can reduce smudges on walk sheets when clipped on the top of the walk sheets.
>
> **Rain**: Inexpensive plastic ponchos, or even garbage bags, will keep canvassers dry. It isn't high fashion, but volunteers will appreciate your thoughtfulness.
>
> **Cold**: The campaign cannot provide warm clothing for every volunteer, but glove and boot warmers can be affordable if purchased in bulk.
>
> **Cold**: Cheap pens can freeze in cold November weather. Use pencils in cold weather.
>
> **Wind**: Clipboards are a huge help, but they lose effectiveness if there are too many items stacked in one. Having a bag, even a grocery bag, will allow canvassers a better place to stick their glossy campaign literature.

of volunteer leaders. These leaders will be responsible for recruiting, training, and launching GOTV volunteers. Many campaigns use off-site (away from HQ) staging areas where volunteers gather to receive materials and training. These sites are run by volunteers the campaign knows and trusts. The staging area(s) is effectively HQ for any volunteer during Election Day and the actual campaign HQ is deserted except for core staff and Election Day attorneys. Precinct materials should be signed out by the leader and he or she should collect the contact information of any volunteer who takes out a precinct.

Phonebanking

Phone outreach is essential to any GOTV operation. In the days before the election, phone calls are made to every supporter in the GOTV universe, with an emphasis on infrequent voters. Use these calls to remind voters of their polling location, confirm their support of the candidate, set up volunteers if they have special needs, and to recruit volunteers for Election Day. Phones provide the most coverage of any personal tactic.

Volunteer phone calls have a greater affect on an individual voter, but if the campaign cannot muster up enough volunteers to cover the list, it would be prudent to hire a professional campaign services firm. Volunteer GOTV calling should be supervised and done at phone banks. This ensures that volunteers are making the calls and that data from the calls comes back to the campaign in a timely manner.

One of the major responsibilities of the GOTV director is securing enough phone lines to make calls through the GOTV universe. Union halls and businesses (law firms, travel agencies, etc) will provide multiple lines if asked. Planning for phone banks requires some calculation and some educated guess about rates (these guesses are replaced by real numbers once you have specific contact rates of your own).

Calculating Your Phone Rates –Example

Figuring out key rates in your phone program can help you assess your needs for Election Day.

1) Completion Rate. Your GOTV universe mostly consists of people the campaign has already called through the voter ID and persuasion phase, so you know the numbers are good. Assume a 75% contact rate after three rounds of calls. To figure out how many completed calls to expect, multiply the GOTV unique households by .75. For calls to un-contacted base supporters, assume a lower number (60%). In this example, we assume that all of the GOTV universe has been contacted at least once before (a good idea, anyway).

> **EXAMPLE**
> Households in GOTV universe = 4604
> Assumed contact rate = 75%
> Projected contacts = 3453

2) Call rate. The rate at which a campaign's volunteers can contact voters is largely a volunteer management issue. Short scripts and on-task volunteers are able to cover the GOTV universe, ensuring that every voter is contacted. The scripts have one simple message: "Get out and vote!" A short script with a good phone bank captain might be able to reach as many as 20 contacts an hour. This will help you figure out how many hours of calling the campaign will need to do to cover its GOTV universe.

> **EXAMPLE**
> Projected contacts = 3453
> Assumed call rate = 20/hour
> Volunteer hours needed = 172.65

3) Hours available. Election Day, as any other day, provides a finite length of time in which calls can be placed. Election Day calls can begin at 9am and last until shortly before polls close. Now that you know how many volunteer hours you need to fill on the phones, you will need to calculate how many phones you need by dividing the available calling hours

> **EXAMPLE***
> Volunteer hours needed = 172.65
> Available hours (9am – 7pm) = 10
> Phones to fill = 17.265

*A number of factors should alter the above assumptions. First, your GOTV operation should ideally update the phone lists and remove supporters who have already voted from your contact lists. Second, contacts will not be made evenly throughout the day. The campaign will make few contacts in the morning and afternoon, and will have many contacts to make in the evenings. In this example, you might decide to keep eight phones filled for the morning and afternoon and 25 or more for the evening.

Low Intensity GOTV Tactics

If you campaign doesn't have the resources to conduct a high intensity GOTV program you can consider using low intensity tactics instead. These tactics can potentially reach a large number of voters, but the impact of each contact is extremely limited.

Direct Mail

Although lower impact than phones or canvasses, direct mail is an indispensable part of GOTV. Unlike the canvass or phone outreach, anyone for whom you have an address is guaranteed to receive contact. Just as with the other forms of contact, you have one simple message: "Go out and vote!" Because of this your mail piece should be simple. Include information about where to vote (each address would have its precinct printed or stuck to the mail piece), why it is important to vote, and contact information for the campaign office for questions.

Even more than with other direct mail, your GOTV mail needs to be timed well. Ideally, you want this piece to arrive on the Saturday or Monday before the election. When in doubt, aim to be a day early.

Literature Drops (Lit Drops)

Lit drops are more personal than direct mail, and consequently, more effective. It also takes less time to cover a neighborhood with lit drops than it does with a canvass. But just as with mail and canvassing, Lit drops are a poor tactic to use if they are not targeted. Typically, lit drops are done in Democratic Base areas where targeting is less important. A tried and true method of GOTV lit drops is door hanging literature with the polling place information for that neighborhood printed on. Though it can be effective, extra care must be taken with this tactic not to accidentally confuse voters with wrong information.

Canvassing takes more people and time, Direct mail takes more money. If you have the resources, however, it's always worth concentrating your volunteers on real voter contact (canvassing and calling) and your money on direct mail.

High Visibility (Viz events)

Numerous visibility events are traditional in the days before a campaign. These events should serve a purpose other than just GOTV. Often these events are set up to get media or rally volunteers. Visibility events should only be done in places where the candidate is already popular (don't want to remind the opposition).

As a solely GOTV oriented event, visibility is a poor use of resources. It is not proven to increase turnout by itself. Your volunteers can engage in tactics more effective than standing on a street corner. The few seconds a driver might see a volunteer on the road have significantly less impact than the time that same driver could spend with a volunteer at the door. This is the same for staff. If staff members are spending time organizing events or lawn sign distribution, they are not spending time doing more high impact work. The key to GOTV is repeated contact and the most potent contact is personal.

The same is true of standing at the polls. Although traditional in many areas, this tactic has even less value than standing on the roadside. People who show up at the polls have obviously already decided to vote. They have also, almost certainly, made up their minds. A good GOTV program is focused only on supportive votes. You should already have enough votes to win. GOTV is the time to get those votes out. A volunteer's time is best spent away from the polling station, and into the neighborhoods.

If all the campaign's target precincts are covered, and all the phone lines are full, the campaign can start distributing volunteers for visibility.

Voting in Advance – Absentee, Early, and Vote by Mail

Every state has some form of alternative voting option. These options usually allow the voter to cast a vote in advance of Election Day, either at a designated location or from the voters' home via postal mail. Many of these advance voting options are restricted to segments of the population, often by age.

Absentee voting is present in some form in all states. This voting option is often reserved for those of a certain age or disability. Most absentee laws include allowances for students or people who commute to work during polling hours. Early voting allows voters to cast their ballots at a designated location such as the county clerk's office or city hall. Many states have a vote by mail program where the county mails the ballot to the voters and the voter mails the ballot back within a certain time frame. Advance voting requires an application before receiving a ballot, and has deadlines regarding application and ballot submissions.

A good breakdown of state by state Early & Absentee voting laws can be found through the Early Voting Information Center at: www.earlyvoting.net

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Benefits of Early/Absentee Voting

1) Convenient for the Voters – Can vote at a time before the election, in the privacy, comfort, and convenience of their own home. Or they can take the ballot, in person, to the County office. The voter will not encounter your campaign's GOTV operation.

2) Often incorporates an auditable paper trail (esp. voting by mail). Campaigns can continually check who has voted and who hasn't to better target their resources.

3) For the campaign these votes are "in the bank"; you will not have to spend resources on these people on Election Day. This is a good investment in resources because it will allow you to start tallying actual votes and saves you time during the period you need it most.

Choosing to incorporate an advance-voting program into your plan is like any other strategic decision. Chasing mail ballots requires time, people, and money. An effective program requires a basic commitment to release a number of targeted Vote-By-Mail (VBM) direct mail pieces and follow-up phone banking to a targeted portion of a campaign's supporters. Consider your vote goal and targeting and figure out the best audience for VBM outreach and calculate the cost per vote. The program should help you reach your vote goal and be in line with your budget.

Incorporating Vote by Mail (VBM) and Absentee Voting into Your Field Plan

You can make the most of your state's advance voting programs by incorporating them into your field plan as another voter contact tactic. States which have VBM and states which have workable absentee ballot requirements can open the door to a voter contact program that can make a big difference in close elections.

Four steps to a good Vote by Mail program

1) **Research** – Find out the feasibility of doing any type of VBM program in the state. Figure out who can VBM and what process the voter must go through. Deadlines will be important in formulating a plan. Determine if the campaign can distribute and/or submit applications (good thing) or if the voter must do it for him/herself (not as good). Figure out who votes early and why. What issues are important to them? This can be useful for targeted outreach down the road.

2) **Integration** – Once the campaign determines who the state allows to VBM, the next step is to determine who the campaign needs to VBM. Budget your VBM program into your targeted direct mail voter outreach. Integrate your VBM program with your voter ID work. ID'd strong supporters should be told about the VBM program, and VBM outreach follows soon afterward.

3) **Outreach** – The vast majority of voters still do not know they can participate by advance voting. Those who do might find the process confusing. Outreach should be done via mail, phone, and when possible, through the door canvass. Ideally, the campaign can simply deliver the VBM application to the voter.

4) **Follow up** – In the hassle of every day life, a voter might forget about his/her ballot, might have tossed it out, or lost it. You have little control of this, so it is essential to follow up with every targeted voter. Usually voters who have submitted their votes appear on the county's voter role after a period of time. This will help you target your follow up.

Recommended VBM program activities

A campaign can adjust this general plan to fit with a given budget and vote goal:

Tactic	Message
Phone or Canvass # 1	**Identified supporter commits to voting early.**
Mailing # 1	**VBM application with instructions. Instructions should be clear (have a volunteer read it) and the deadline for the applications should be in large bold font. Pre-print information if possible.**
Phone or Canvass # 2	**Did you get the application? It's important that it is promptly filled out. How can I help?**
Mail # 2	**Thank you for applying. Here's what your ballot will look like.**
Phone or Canvass # 3	**Follow up. Did you get the ballot? It's important that it is promptly filled out. How can I help? This call comes no later than four days after voters receive their ballots.**
Mail # 3	**Reminder mailing, motivational, urgent. Submit your ballot NOW. Sent to those who have not yet voted.**
Phone or Canvass # 4	**Last minute ballot chase for unsubmitted votes before deadline.**

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Helpful tips:

- Secure postal permits early. Ideally, get a business reply permit and/or have applications returned to the campaign headquarters (instead of the county office) so you can keep track of your voters. Be sure to check with the county board of elections to see if you can legally collect and submit applications on behalf of the voter.
- Leave a phone number in your mailings for questions. The voter can call the campaign office for assistance with filling out the information. Be sure to train your staff.
- Messages targeted to your VBM voters need to be sent out earlier because they vote earlier. If you know what issues tend to motivate your district's early voters, you can tailor your mailings to speak to that issue.

Poll Checking (striking voters from contact lists)

Once an individual has voted, the campaign should no longer contact this person. The key is to figure out who has voted. Some states and counties allow only certified individuals access to the list, other post the list for everyone to see outside the polling area. Some states and counties only allow access to this information at certain periods of the day, while others allow open access. In any case, the GOTV director must understand how volunteers will have get access to these names to integrate it into Election Day GOTV.

Volunteers canvassing a precinct would ideally have easy access to the list by just checking in with the polling official as allowed. Getting these names to the phone banks can be more difficult. Typically, the campaign will have three checks in the day: One in the morning, one in the afternoon, and one before the evening rush.

Laws vary greatly from location to location. Campaigns which can not get these names to the phone banks will spend much of their time with people who do not need a call at all.

Sample Election Day Schedule

Precinct teams meet at 5:00 a.m. on Election Day. Teams put up signs at key locations around the polling place. Poll watchers arrive at 5:30 a.m. and supervise the preparations to open the polls.

7 am Polls Open
- Poll watchers/Vote checker begin crossing off names, and passers begin handing out sample ballots.
- Staging areas check in with HQ.
- Coffee and doughnuts for volunteers and poll workers.
- Volunteers begin to arrive at appointed staging areas and phone banks.

9 am Calls Begin
- Vote checker reports names of supporters who've cast their ballots. These names are removed from voter contact lists for phones and canvasses.
- Phones calls to supporters who haven't yet voted begin and continue throughout the day.
- Canvassers arrive in precincts and contact supporters who haven't yet voted throughout the day.

1 pm Lunch
- Precinct captain provides lunch for volunteers **after** the regular lunch hour rush.

2 pm Second Run
- Vote checker reports names of supporters who've cast their ballots. These names are removed from voter contact lists for phones and canvasses.
- Field/GOTV director might reallocate resources according to need.
- Door knockers make a second run through the precinct.

5 pm Third Run
- Vote checker reports names of supporters who've cast their ballots. These names are removed from voter contact lists for phones and canvasses.
- Field/GOTV director might reallocate resources according to need.
- Door knockers make a second run through the precinct.

8 pm Polls Close
- Poll watcher and precinct captain supervise the ballot counting.
- Volunteers clean up signs and other campaign literature around the polls.

8:30 pm Victory Party

People: The Grassroots' Greatest Strength
Building Your Volunteer Base

People are as much of a resource as money and time. We already know that you can get people to donate their money; they can also give you their time. On a grassroots campaign or for any grassroots organization, people are the key to building capacity. Activists will do work that the organization would otherwise need to pay a vendor for.

The problem faced by many campaigns and organizations is a lack of understanding of how to best utilize this resource. Activists are not a resource to be underestimated or taken for granted. Building a base of activists is similar to building a fundraising base. Each activity pursues donors. Some donors give their money, some give their time. Each group contains donors nonetheless, and should be treated with the same respect.

FIRST THINGS FIRST –
1) Get a Volunteer Coordinator
If a campaign plans on recruiting large numbers of volunteers, then it is important to task a specific individual to manage those volunteers and make sure they are being utilized and developed into leaders on the campaign.

Large campaigns with many volunteers should consider hiring a full time staffer for this position. Campaigns with fewer volunteers can combine this position into another (usually the Field Director or a Field Organizer) or recruit a 'Super-Volunteer' to help with the position. Either way it is important that all campaigns have a person dedicated to ensuring its volunteers are managed and developed properly.

2) Make A Needs Assessment
The first task of any Volunteer Coordinator is to make a Needs Assessment for the campaign. They can do this by meeting with each department on the campaign and find out what they could use volunteers' help with. Never be in a position where you have volunteers with nothing to do. This will suck the momentum right out of your campaign.

Document where you need volunteers, how many you need, and when you need them. This needs assessment should be broken down by department and date or time. You might need help with data entry on Wednesday, on a mailing on Thursday, and on a canvass on Saturday. Check around to see when people need volunteers.

It's often helpful to have a list of odd jobs and constant tasks posted up on the wall somewhere volunteers can see. If you have a surplus of volunteer time, or an unexpected eager volunteer, this list is available for anyone to plug into.

Volunteer Recruitment
The first step in utilizing people as a resource - just as in fundraising - is to understand the donor's motivations and the organization's needs.
Motivation: Why Do People Volunteer?
- Passionate about an issue(s)
- Recognition/ Feel Useful
- Loyalty/Aversion to Party or Candidate
- Opportunity for Advancement, Networking
- Social

No reason is better or worse than another. The important thing is to figure out what motivates people to donate their time. Remember that they are getting something out of volunteering for you. Once you've figured what that something is, you can get the most out of your volunteers. Getting the most of your volunteers is a campaign skill. The first time the volunteers come through the door, it is generally because of the candidate. The second time, and every time thereafter, it is because of YOU.

Where do I start?
Not surprisingly, the principles for recruiting activists are similar to those for raising money:

1) Start close to home. Who do you know?
2) Then, cast a wide net.
3) Recruitment builds the campaign; always be recruiting.
4) The best recruiters are existing volunteers.

Social Events – BBQs, Meet-and-Greets, etc – are great for recruitment.

"Hey, how are you? Remember to sign-in here, just so we remember to tell you when something is happening in your neighborhood. Drinks are over here."

Volunteer Events – Bring-a-friend components to your existing volunteer activities will boost your volunteer recruitment by encouraging volunteers to engage their networks. Incentives and friendly competitions work well.

"Always happy to have some Little Rock for Obama volunteers at our event. I heard the Little Rock for Clinton people are also coming. I think they said they'd bring 20 people. How many can you all bring?"

Recruitment Events – Kick-off meetings, 'emergency' meetings, etc – are explicitly all about recruitment. People attend because they know something is up and they want to see what's next.

"Our EMERGENCY meeting is TOMORROW. The election is days away and the opposing candidate is outrageous. Your neighborhood is important and I need your help. Oh my goodness, can you come? Busy? How about Thursday?"

What do I do? - Common Recruitment Tactics
- Volunteers referring other volunteers
- Outreach to other organizations
- Phone banks
- Canvassing
- Email announcements
- Flyering, Tabling, and Posters

Here are some ideas for recruiting volunteers:
- Former volunteers
- Friends and Family
- Voter lists
- Sign-in lists from events
- Donors
- Church, Synagogue, Mosque, etc
- Work colleagues
- Women's groups
- Minority groups, ethnic associations
- Environmental groups
- Service Organizations
- Dem Youth groups
- Dem Party Activists
- Labor unions
- Peace and Justice groups
- Senior organizations
- Fraternal Organizations
- Alumni groups
- Student groups

*Remember, busy people are **more** likely to say yes.

(Why do you think they're so busy?)

Some tactics are more effective than others. The more personal the outreach, the more successful the recruitment tactic. Personal outreach often takes more time, however, and the trick is to find the right balance.

Volunteers referring volunteers is by far the best tactic because the campaign spends no additional resources (aside from managing the original volunteer well). Outreach to other organizations has a similar benefit. Phone banking is the best "bang for the buck" in terms of time and costs. Adding a volunteer recruitment component to canvassing is a must for ID canvasses.

Whether at a neighborhood BBQ or waiting in line somewhere, ALWAYS be recruiting.

Mastering the 'Ask'

You are a leader. Your job is to get your staff and volunteers to follow you. You set the tone. An energetic and enthusiastic leader will beget a focused and motivated volunteer base. People are attracted to excitement and positive energy. The more you exude this, the more your existing volunteers will actually feel it. You will attract more people, and you'll be able to keep them. Do everything with enthusiasm. Your attitude is reflected in your volunteer recruitment. **Remember, you set the tone.**

THE MOST POWERFUL RECRUITMENT TOOL: ENERGY AND ENTHUSIASM

No Script? No Problem. Here are the five basic principles of any ask, "The Five C's"

1. Connect – Establish a quick personal rapport. This is as simple as looking them in the eye, noticing a new haircut or cool button, or referencing a previous conversation.

2. Context – Let them in on a piece of the strategy and how valuable a role they play in the strategy. This is an important and an effective use of their time.

3. Commitment – Get a solid commitment. Use a solid ask. If you're ask is a roundabout question, you get a noncommittal answer. "Probably," "maybe," and "I'll try" are not "Yes."

4. Catapult – Throw them into the commitment. Be excited about their answer and let your enthusiasm gush. Ask them who else they're bringing with them.

5. Confirm – Give them a reminder of their commitment. Don't count on them until you have made a successful confirmation.

IF YOU ABSORB ONLY ONE THING FROM THIS SESSION, LET IT BE THIS:
"You Don't Get What You Don't Ask For."

You're too busy to do everything that needs to get done, but somewhere there is someone willing and eager to do it for you. You **just need to ask.** Cast a wide net; **ask** everyone. **Ask** big, **ask** for anything, **ask** for everything.

Recruitment Math

The Rule of Halves: an Ironclad Law in Organizing

It's simple:
> **1) Divide your confirmed "Yeses" by two.**
> **2) Multiply your "Maybe's" by zero.**

Need 10 volunteers for a day of canvassing? Get at least 20 commitments. If more show up, that's great. That happens. Be prepared. But always remember: The rule of halves owns you. Respect it. Use it.

Make the math work for you: Confirm, Confirm, Confirm.
- Just because a volunteer said "yes" a week ago doesn't mean he or she is coming. Give him/her a call and confirm the day before and the day of the event.
- Emails are **not** confirmations. Phone messages are **not** confirmations. Hearing with your ears the word "yes" **is** a confirmation.
- Don't consider anything a "yes" until you've confirmed it once.
- **Then** cut that number in half.

KNOW YOUR RATES – To make quick educated estimates, campaigns will want to figure out a quick set of assumptions for the number of tasks a volunteer can complete an hour.

For example, we already know that of the people who agree, only half will show, but…
Of the people you ask, how many are likely to say "yes"?
Of the people you call, how many people will pick up the phone?

> **Good Rates to figure out:**
>
> - Voters per household
> - Doors knocked/ hour
> - Doors contacted/ hour
> - Phone calls/hour
> - Contacts/ hour
> - Volunteers yeses/ hour
> - Voter data entered/ hour
> - Travel time to parts of the district

As you get to know your list of potential volunteers, you can begin to use more precise numbers for "yes" rates and contact rates. If, for example, your yes rate and your contact rate were both 50%, you'd need to call at least 80 people to get 10 people to show up at all.

> **10 volunteers = 20 commitments = 40 asks = 80 calls**

If your 'yes' rate is 25% and your contact rate is 33%:

> **10 volunteers = 20 commitments = 80 asks = 240 calls**

As you activate your volunteer base, you'll develop a better grasp on these rates and how they change over the course of the campaign.

RECRUITMENT MATH LESSONS:
1) **Understand and learn to use rates and calculations**
2) **Build a large recruitment pool**

Plugging In Your Volunteers:
Making a List and Crunching the Numbers

A campaign, like any major undertaking, can be broken down into a series of tasks. Successfully managing and coordinating your volunteers requires a thorough understanding of these tasks. Even something simple such as holding a quick visibility rally should be broken down into a set of tasks so that you can assign volunteers where you need them. A few simple steps can help you allocate your volunteer resources efficiently.

THE BASICS OF VOLUNTEER ALLOCATION
1) Create a list of tasks needed to complete an objective.
2) Calculate the time it takes for each task to be completed.
3) Determine how many volunteers it will take to complete the required tasks in the time you have.
4) Assign Volunteers.

Example: Voter contact.
How many volunteers do we need to canvass 2500 voters in District #1 in one weekend?

1) Figure out how many houses there are in the county. Often, multiple registered voters live in the same household. The number is usually substantial enough that it factors significantly in calculating how many voters per 'door knock.' This information is available directly from an enhanced voter file, or just by looking at your lists and doing some quick math. 60% is a good default estimate if you don't know your number.

Number of Target Voters **(2500)**	x 60% =	Number of Target Houses **(1500)**

2) Identify how many houses a volunteer can reach an hour. This number will vary depending on population density, residential zoning, houses vs. apartments, etc. **The best way to get an idea of this rate beforehand is to scout the turf with staff or volunteers.** Let's assume we're in an older single-family housing area of town. Nine door contacts/ hour is a good estimate.

Target Houses **(1500)**	Contact Rate (HH's/hour) **/ 9 =**	Volunteer Hrs Needed **(167)**

3) Calculate the number of reasonable hours that exist to complete the task. Good canvassing hours may vary slightly from neighborhood to neighborhood, but generally:
        Saturday = 10am – 4pm = 6 hours
        Sunday = 12pm – 6pm = 6 hours
Generally, you can schedule a canvass shift to last three hours (not including set up or training). Your total for the weekend is 12 hours or 4 shifts, two each day.

4) Calculate how many volunteers you need to fill each shift.

Vol. hrs. needed **(167)**	/ # of shifts **(4)**	/ 3 hours **(3)**	= Vols per shift **= 14**

5) Conclusion: To reach 2500 targeted voters in one weekend through canvassing, we need to have 14 volunteers for four shifts, a total of 56 volunteers. The rule of halves dictates that we would, in fact, need 112 volunteers to commit to the weekend canvass.

Good Campaigns do the math. The above is an example of a small objective with only one major task. More complex objectives require more planning (refer to the planning section of this manual). If you do the math, you'll be able to predict and troubleshoot any potential problems or shortfalls.

Volunteer Management
Building Your Activist List – Data Collection

As with any resource, an organization must track how activists and potential activists are being utilized. In order to do this, the volunteer operation in a campaign must be meticulous in collecting relevant data. An organization needs to know who is signing up, who is showing up, what they did, and how to contact them again. Tracking this data not only helps you get people back in the door, but can also indicate areas of improvement in the recruitment and management of your activists.

If the volunteer has signed up online or via email, the absolute minimum information the organization must collect is email and zip code. For in-person sign-ups, the minimum information to collect is name, phone number, email, and zip code. In addition, collect alternate phone numbers, address, event volunteered, date of last contact, and how the volunteer came to know about the volunteer opportunity. It is often a good idea to have a standard "Volunteer Sign-up Form" which asks for this information. (See the following page for an example).

Events
Regardless of the primary purpose of any event (earned media, engage donors, etc), a great byproduct of any event is a fresh list of potential volunteers. People who might not otherwise volunteer might go to an event, become motivated, and sign up for more. Make sure you have a well-organized data collection plan for each and every event where you expect the public to attend, no matter how obscure.

Of course, they'll only sign up if you ask them. Or make them.

Once They're in the Door
When a volunteer does show up, you're still collecting data. Just as in any event, volunteers sign-in. Your list is more than a list of people who might show up; it's a list of people who can do the work of the campaign. On top of the contact info you already had, you need:

- Who actually shows up
- When they show up
- What they did, what they like to do
- Best way to get in touch with them again (confirm contact info)

> **Data Collection Tip:**
>
> People might not want to give a stranger their contact information, but seem to love to "sign up to learn more." It's a less intimidating way of saying "expect my call."

Before They Leave
It's important to debrief a volunteer after he or she is done for the day. Do not underestimate the importance of asking a person how the activity went. In addition to making the person feel valuable, it allows you to anticipate problems and opportunities. It is also a great way to confirm your data and obtain another commitment. Every debrief ends with another pitch for the next volunteer opportunity (so be ready), or better yet, a pitch for establishing a regular volunteer commitment.

Volunteer Sign up Form

Our campaign needs energetic volunteers!
Please let us know how you can help us take our country back!

Name:	Home Phone:
	Cell Phone:
Address:	Email:

What is the best way to contact you?

I can help the campaign by:

(Please circle)

DOOR KNOCKING   PHONE CALLS

Mailings   **Registering Voters**   **Data Entry**

Poll Watching   **Yard Sign Assembly**   **Yard Sign Delivery**

Office clean-up   **Phonebank & Canvass Prep**   **Event Staffing**

My special talent: _____

Bi-lingual?   □ **Yes**   □ **No**

I am available to help:

Weekdays 9am-5pm   **Weeknights 5pm-9pm**   **Weekends 12-6pm**

Thanks! We will be in touch in the coming weeks with volunteer opportunities!

Comments:
_____

_____

Volunteer Management
Working With Volunteers: Key Principles

Volunteers are valuable – let them know.
- Every volunteer should be greeted upon entering the office, and debriefed on the way out.
- Never leave a volunteer standing or sitting doing nothing. This is true even if the office is especially busy. A busy office with a bored volunteer indicates a failed volunteer program.
- Thank volunteers profusely.
- ALWAYS provide context for the tasks at hand.
- Feed volunteers. Have food constantly available. If you feed volunteers only candy, they will crash or become irritable if they are there for more than a couple of hours. This is especially important on Election Day. On E-day, deliver the food yourself.
- Pass out perks (free swag, picture with the candidate, etc) to your best volunteers.
- Be creative with recognition. It doesn't need to be anything fancy. Taking pictures of your regular volunteers and putting them up on the wall is a classic and effective form of recognition.

Give specific tasks and set clear goals.
- A specific, quantified goal gives volunteers a sense of purpose and direction beyond simply "we gotta win the election." How does this activity win the election?
- Goals should be product driven, not time driven. The campaign needs 1000 envelopes stuffed, not four hours of envelope stuffing. Product-driven goals focus volunteers on the task, not the clock.
- Achieving a challenging goal gives volunteers a sense of accomplishment.

Lead by example.
- Volunteers are more efficient when you are nearby, working or supervising.
- The second most inspiring sight for volunteers is to see staff roll up their sleeves and do the dirty work alongside volunteers.
- The most inspiring sight for volunteers is seeing the *candidate* join in.

Before they leave…
- Schedule a time for volunteers to come back again.
- Better yet, work out a schedule for the month.
- Make sure you do a quick *debrief*.

Training Your Volunteers

To make the best and most dependable use of volunteers, the campaign must train them. Frequently.

The best way to train adults is to actively involve them in the training; have them learn the task under your supervision in a way that gives them hands-on experience.

A typical training agenda is simple:

1. **Contextualizing**. Give the volunteers the big picture, and how their task fits into it.
2. **Telling**. Spend a small amount of time telling them how to do it.
3. **Showing**. Spend a little more time doing it once in front of them.
4. **Doing**. Spend the most time doing a role-play with you in their role (or have them do it in front of you).
5. **Expecting**. If you think they can do a better job do it with them for a bit, showing how you like it done.

Spend most of your training time on role-plays!

A Good Training:

o **Invests the volunteer in the success of the campaign by putting the activity in the context of the campaign.**
   "We NEED to respond to our opponent's attacks. These mailings will raise enough money to do that, but only if we send them out quickly and send them out right."

o **Serves as quality control for the campaign**
   Volunteers represent the campaign in the eyes of the public. Activists should not start working for the campaign until the campaign is confident with the volunteers' skills.

Train, train, and retrain.

No matter how trained a volunteer, it will always be a good idea to continue training them. Campaign volunteers should begin to expect brief trainings at the beginning of each volunteer activity. Rather than becoming bored of the training, they will appreciate it. Volunteers will understand the importance of the task itself and the time spent doing it. This will also give them the confidence to move to other projects, knowing that the campaign puts a priority in preparing volunteers for tasks.

Involve your experienced volunteers in the training itself. Good volunteers who have taken your training multiple times can eventually begin training your new volunteers for you. This gives them ownership over a piece of the campaign and allows you to focus on other tasks.

Retention and Attrition

No Fun: Working on a campaign is different than any volunteer's day job. It's interesting and should stay that way. Have busy, colorful walls and music in the volunteer spaces. Frequent after-work or after-event socials are easy ways to keep things lively.

No Love: No matter the motivation of the individual volunteer, everyone wants to be recognized for hard work. Thank them. Recognition is free, give it away. You haven't thanked your volunteers enough unless it feels like a little too much. Encourage staff to socialize with volunteers. Veterans like to feel like insiders, so have them take newbies under their wings, show them the ropes, etc.

No Growth: The volunteer should be growing in his/her roles, given more responsibilities, or at least new roles. Stagnation is boring. Boredom leads to attrition. The campaign should also be growing and gaining momentum. Even the most common tasks and responsibilities take on a greater significance to the volunteer when that volunteer is given a title.

Having A Life: As volunteers become more involved in the campaign, they lose time with family and friends. If your activists feel like they need to have a life, that's great. Encourage activists to bring their friends and family to campaign activities. Listen to your volunteers; you'll know who among them feels overwhelmed. Don't be afraid to ask for more out of your volunteers, but be mindful of their needs.

Internal Conflict: No one likes office politics. Whatever internal struggles are waged behind closed doors should stay there. Volunteers should be shielded from any internal drama or disagreement. They will either leave because of tension, or worse, they'll have an opinion on the whole matter.

Forgone conclusions: Sometimes you just know that you're going to win or lose. But there's still work to be done. Let them know how important their work is. Use examples of upsets and underdogs, fatal bloopers and sudden surges.

Nothing to Do/Waste of Time: One of the biggest mistakes a campaign can make is to waste a volunteer's time. People, like campaigns, have limited resources: they could be doing other things. It is the duty of the Volunteer coordinator to assign tasks to volunteers, and to gauge their progress accordingly.

Volunteers Are Not

****Volunteers are not "free" labor**. They take time, energy, and food. It costs the campaign resources to recruit, train, and manage your volunteers. Volunteers know when they're merely warm bodies.

 ****Volunteers are not staff**. Staff can be held accountable relatively easily. Staff will not randomly leave the job or decide to stop showing as volunteers frequently do. You can also expect staff to do a more professional job. Volunteers will take more time and make more mistakes than if you hired staff or a campaign services firm. Going with volunteers is a choice with an opportunity cost.

Leadership Development

A grassroots campaign is never run on staff alone, nor can any campaign be run entirely by an irregular volunteer force. Campaigns and grassroots organizations depend on leaders. These leaders are more than occasional helpers; they hold positions of responsibility.

Leaders Are Never Born. They Are Developed.

Although it's possible some previously unknown superstar activist might walk onto a campaign, it's unlikely. An organization should develop leaders among existing volunteers. Spending the time to develop leaders is an investment. Having a capable volunteer in charge of a phonebank shifts frees up field staff to complete other tasks. The time spent developing these volunteers in the beginning pays off when the campaign has less and less time.

Leadership development is not spontaneous. Leaders are those who are given real responsibilities, thrive on feedback, and keep coming back for more. For this to happen, the organization must give the activist responsibilities, feedback, and opportunities. Leadership development is in the hands of the organization. The organization chooses to develop leaders or chooses not to have any leaders.

If You Want Something Done Right…
Stop Trying to Do Everything!

Many groups have a 'do-everything' kind of leader. These groups usually disintegrate when that leader burns out, leaves, or is no longer able to lead the organization. These leaders allow their own efficiency to sabotage the growth of their organization. Giving activists more responsibility develops them as leaders and will benefit the campaign or organization in the long term. The diagram on the right shows how an organization can develop leaders by giving activists increasing levels of responsibility. Activists will choose a level comfortable for them, but existing leaders must give activists the opportunity to take ownership over a piece of the organization.

Leadership Development: Help Your Activists "Step Up"

Phone bank Shift Captain

Phonebank Trainer

Phonebank Asst. Trainer

Phone Calls

Visibility

1st Time

2nd Time

3rd Time

4th Time

5th Time

Each time an activist comes in to volunteer, the organization has the potential to develop a leader. Your best volunteers should be given a new title and increasing levels of responsibility each time you ask something more of them. Your best volunteers will 'step up' and manage more of your campaign, freeing you up to do other work.

Work With the Best.

Because resourced are limited, leadership development requires prioritizing. Early in the campaign ask yourself which activists have the most potential to become leaders and target them for development. An hour spent training a stellar volunteer produces more than an hour spent on a mediocre volunteer. Everyone should be trained and given your attention, but some volunteers are simply more effective than others and the time spent with them will pay dividends later.

Set Expectations and Hold Leaders Accountable.

Activist leaders thrive on high expectations. When properly trained and invested in a goal, a leader will come through for a campaign or organization. Volunteers are not staff, but if you lay out clear expectations and invest the time and energy they can be just as valuable to a campaign or organization.