



Swipe File: Written Campaign Plan Template

As Don Brown, my high school-era sales mentor, taught me long, long ago...

"If you haven't put your ideas down on paper you haven't thought them all the way through."

Most candidates don't have written campaign plans.

Which means they haven't thought their campaigns all the way through.

Have you written a campaign plan?

Have you ever even SEEN a written campaign plan?

Well, let me fix that.

Below is a template campaign plan written by my friend Mark Montini almost 20 years ago.

But the ELEMENTS are the same today.

Just follow the blueprint and insert your own specific information as it relates to your campaign today.

Add as you find appropriate...especially when it comes to your social media component, which wasn't a factor back at the turn of the century.

And as a bonus, this document – once completed – will greatly help in your fundraising efforts.

Cheers.



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** Psephology (see-follow-gee): The study of campaigns and elections*

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C O N F I D E N T I A L

Campaign Plan

Steve Smith for State House

Political Analysis

The (sample) political analysis is a listing of those things that we all agree will have an impact on the Smith race for the State House in 2002. If any of these are proven wrong during the course of the campaign, the strategy will have to be re-written.

1. The 20th district is not a Republican district, but it is a district that the right Republican can win. Bush Jr., Bush Sr. and Reagan carried the district.
2. John Jones is running for re-election. John has developed a moderate, non-threatening image here at home that has stood him in good stead up to this point. He is not considered a threat by the business community, and many people think he has delivered on constituent services. His liberal votes and radical views in the State House have begun to filter back home in recent years, which is one reason why the election was so close in 2000.
3. The GOP central committee will remain neutral in the primary, but many members will take sides. We should be able to win a majority of the members.
4. Steve's wife, daughter and family are supportive of his race for the State House and will cheerfully make the sacrifices demanded of them.
5. The 20th district includes all of Any Town.
6. The working media is not hostile. They gave the primary a great deal of attention in 2000, and will do so again in 2002. Print media will cover the race, broadcast TV will not.
7. Twentieth district broadcast media is expensive, more so than anything else you rely on contributions to pay for. The print media consists of three newspapers, the Any Town

Times, the Any Town Sun & the Any Town Bulletin.

8. Steve is a native of Any Town and has voted in the area for years. Steve has always been actively involved in the community.

9. Any Town has Republican hotspots in the district, and that is where Steve and his parents live.

10. Steve will have opposition for the GOP nomination for the State House. Here is the current line-up:

a. Rob Robertson. Thirty-eight years old, Robertson has to be considered the front-runner at this time. Jones hit him pretty hard in the waning days of the 2000 campaign, so he may have some negatives in public perception.

b. Don Donaldson. Don is a sitting member of the Any Town town board. He's only been a Republican since 1990. He moved to Any Town and was elected in 1992 through a strong grass-roots campaign. Thirty-six years old, Donaldson is a stockbroker, and has some personal money.

c. Kelly Kelso. 31 years old, Kelso is a single mother of two, she has a make-work job with her dad that pays big bucks, and is capable of putting those big bucks into her campaign.

11. Steve's responsibility to his family will impose some time restraints upon his ability to campaign. He will have to work at least part-time.

12. John Jones probably won't debate, and certainly won't debate or even appear at public events with Steve until after the primary. There may be a GOP debate or two, and all the candidates will participate, but these debates will be of little importance.

13. Just as in 2000, John Jones will have plenty of money, although not as much as in the past. The Democrat loss of the State House will cut down on Jones's PAC contributions.

14. Steve Smith will have to struggle to raise his budget. The top amount we can hope to raise for the primary will be \$xxx,xxx and we will probably have to do with less. We can expect to be out-spent, so our messages must be dramatically stronger and more cutting than our opponent's.

15. Steve is an established candidate. His election to the central committee and managership of several races have earned him credibility within the local GOP. The media will take him more seriously than they did in 2000, as will the GOP

contributors. Unfortunately, John Jones will take Steve seriously too.

16. The Christian Coalition and evangelical community could be an important source of volunteers for the Smith campaign. We may be able to get some money from the major contributors to the CC as well as some helpful support from the CC, but locally this organization is worth more to us organizationally.

17. Republicans will vote solidly for GOP candidates in the general election as long as they are not embarrassed by the Republican candidate. In the general election we must also convince moderate Republicans and conservative Democrats that Jones is not as conservative as everyone thinks.

18. John Jones is taking this race seriously, and will in all probability run a solid campaign, as he has in the past. He will not hesitate to attack Steve. In the last campaign he attacked his opponent six weeks out from Election Day.

19. There are no other races that will pull people in to the GOP primary.

20. Smith should be able to put together a volunteer structure. With his work in the GOP vineyards over the last four years and with his ties to the gun groups, law enforcement professionals, veterans and the pro-life movement, volunteers should not be too big a problem.

Key Decisions

Key decisions are those decisions that are strategic or critical to the success of the campaign. Too often campaigns make these kinds of decisions under pressure, and not always correctly. Sometimes the questions raised here are not addressed by the campaign at all. We will attempt to answer these questions here and now.

1. What will be the personal financial involvement of the Smith Family?

Except for opportunity loss and incidental expenses, Steve Smith will not put any money into the campaign. He can give enough to put himself in debt for the next 20 years, but he can't give enough to make a difference to the campaign. His personal funds will support his family and ensure this race for the State House does not land him in the poor house.

2. Who makes strategic decisions?

Strategic decisions will be made by Steve and the campaign manager (when we have one), working in tandem. This is Steve Smith's campaign. Decisions that effect Steve's

integrity, morality, personal sense of honor or his checkbook, will be his and his alone.

We have put together a steering committee and we will put together a "kitchen cabinet" to offer advice on tough decisions and serve as a sounding board for our ideas. The cabinet is composed of people who Steve trusts and who have some political experience (list the names here). The steering committee will not make decisions, but will serve as a sounding board for Steve and his campaign manager, and will be at least partly honorary in nature.

On the other hand, Steve is running for the State House and must not be bothered with mundane or "serial " decisions. **That's why Steve will hire a campaign manager.**

Approving this campaign plan will settle some of the questions about strategy and tactics. Other questions will be decided by Steve, with the input of the Campaign Manager and the kitchen cabinet. The campaign manager will make the day-to-day decisions of the campaign. He (or she) will make a certain number of bad decisions, but it's better to live with some bad decisions than for Steve to attempt to micro-manage the campaign.

3. Who has the checkbook? Or more exactly, who decides what bills get paid and in what order?

Right now, Steve has control of the purse strings. Later on the campaign manager should make most spending decisions. The campaign manager has to know how much is in the bank, and what is owed so that he can make accurate decisions about spending. Spending amounts of \$1,000 or more should be cleared with Steve, however.

4. Who hires and fires?

Steve will first hire a campaign manager, and the manager will hire other staff as needed. Steve will have veto authority on the hiring of staff.

5. What groups will we not take contributions from?

We will take PAC money. Liberal PAC's will probably not contribute to us, so the question of taking their money will never arise. For the record, we won't take money from the Any State Trial Lawyers Association, environmental groups and teachers groups.

Because some interest groups cleverly disguise the name of the giving organization, no PAC check should be cashed unless we know who they are and what group they purport to represent.

6. What is the role of the Smith family?

Mary wants to be active. Because she has to work, she won't be able to campaign much, but will serve as campaign treasurer. She has also agreed to handle some of Steve's domestic chores so that Steve can devote more of his time to the campaign.

7. Is Steve Smith willing to run up a campaign debt by the end of the election?

Yes, but only a small, manageable one, and only if prospects of victory seem reasonable. The campaign manager must insure that close tabs are kept on what is owed to who, and Steve should be briefed on the financial status of the campaign on at least a weekly basis.

8. What is it that Steve simply won't do?

Won't change his deeply held beliefs and won't compromise his principles.

9. What is our position vis-à-vis other candidates?

Steve will not endorse a GOP candidate unless the race is over by the time the Any State primary takes place. We will support the Republican nominee for _____, but we are not going to lead with our chin on this one.

We welcome supporters of all stripes, including Democrats (there won't be a lot of those), and we don't want to risk offending potential supporters if we don't have to. Besides, the candidates for higher office have more resources than we do and don't really need our help.

10. What about the GOP label?

Steve makes no apologies for the fact that he is a Republican. Because of the Democrat registration edge, after the primary we will not prominently display the GOP label, elephants, etc. Even though the Republicans are gaining strength in Any State, we are still not going to grind our GOP affiliation into the voter's faces.

11. What is our position vis-à-vis the Christian Coalition?

The Christian Coalition has massive resources, and has a cadre of fiercely loyal volunteers who will work for and vote for the right candidate in the primary.

We will seek Christian Coalition help. We mostly need help in fundraising and organization, and that is what we will seek from them.

12. Will we attack?

In the primary we will draw contrasts with our opponents, but only if we find compelling reasons to do so, and we will not run a totally negative campaign. Steve has many positive things to say about himself, and we want to insure that message gets out before we turn our guns on our opponents.

In the general we will attack Jones on the issues.

13. When does the campaign start?

Because of the early primary date, the campaign should kick-off in September. That means the primary will be six-seven months in duration.

14. When does Steve start full time?

Steve will campaign part time until _____, and then begin campaigning full time.

Here is a short listing of Steve's pluses and minuses as well as a Strategic Message Grid, which shows the positioning strategies of our campaign versus our opponents.

These charts are all oriented towards the primary (what may be a plus during the primary could be a minus for the general election).

Steve Smith

Pluses

Conservative
Has managed campaigns
Father as asset
Active in the community
Highly organized
NRA member
Supportive family
Native of Any Town
Decent speaker
Friendly, genial
Pro-life

Minuses

No elective position
Can lose temper
Short
No money
Small name ID
Can't campaign full time
Has managed campaigns

Leesburg Grid

Steve/Steve

Decorated veteran
Conservative & Pro-life
NRA member
Worked for GOP candidates
Life-long Republican
Native to area

Steve/others

No military service
Mixed
Not real Republicans
Haven't labored for GOP
Not from here

Others/others

Ran last time/deserve it
Elected official
Young & aggressive
Can raise money

Others/Steve

Ran & lost
Insignificant insect
Can't win
Has no money

Strategy Statement

We will win the Republican primary by posing a choice to Republican primary voters between two very different types of State House candidates and forming a coalition of people who live in Any Town, pro-lifers, gun owners, regular Republicans, law enforcement professionals and veterans. We will lump Donaldson, Robertson and Kelso together as politicians who are different from us in that they aren't from here and aren't really Republicans.

Steve will run as the kind of traditional conservative Republican that GOP voters know and trust. We will portray Steve as the safe choice for conservatives because they know his type --just a normal citizen who wants to do right in the State House and protect and preserve the great American middle-class. We will portray our opponents as career politicians in training who put ambition before public policy, political philosophy and party loyalty.

Steve will emphasize his native Any Town roots, his community service and local business ties.

Our campaign will be a low budget affair. We will not waste money on staff, but build a grass-roots campaign. We will not run a district-wide media campaign, but will "go long" with our targets. Most of the campaign's resources will be spent in communicating and winning votes from our coalition.

Message

Our message for GOP primary voters is that Steve is one of them. Steve is not a career politician, or a high society jet-setter, or a Democrat or even an ambitious politician, but a regular guy who wants to make America and Any State a better place to live.

We will pose a question to the voters of the 20th district. Simply put, if they wish they can vote for career politicians in training, former Democrats who have turned Republican to win elections, or wealthy jet-setters who will never understand the problems they face.

Or they can cast their votes for someone who, like them, is sincere in his conservative philosophy of government and who is dedicated to preserving and protecting America's middle class.

Campaign Theme/slogan

Our campaign slogan should emphasize the contrasts between Steve and his opponents in one sentence or phrase. Here are the four finalists:

Keep the Revolution alive!

This emphasizes Steve's commitment to conservative principles. The implication is that the other GOP candidates, who are not real Republicans, are not committed to real conservative change. Steve is staking out the claim that he is the torchbearer for the GOP agenda.

One of us!

At its most basic, this is an appeal to voters based upon the fact that Steve's opponent's have recently moved into this district and are recent switchers to the GOP. The slogan is over-used, but accurate and descriptive.

Life long Republican. Principled Conservative.

This states for the most dull-witted what Steve's candidacy is all about. Each of these attributes is also a heavy contrast with our opponents.

A lifetime of service, a dedication to the Republican Revolution!

The "mega-slogan"! This slogan emphasizes Steve's service to his country and the Republican Party, and his commitment to other GOP initiatives. This slogan puts Steve

clearly on the side of the angels -- a veteran who is also the point man for GOP conservatives.

All of these slogans should be used at some point in our ad copy. All of them work at some level. We just need to pick one and go forward.

Our Winning Coalition

Veterans -- Our message to veterans is that Steve understands their problems and their love for their country.

Steve will seek out the various veterans organizations in the district and seek to speak at their meetings. We will try to get their mailing lists and mail them or get local veterans leaders to mail their membership lists for us. Steve will seek endorsements from the national and local leaders of veterans organizations. We will print up a simple flyer that outlines Steve's positions on the issues and a little bit about his background and distribute this to veterans wherever possible.

Any Town -- Steve must work hard to become "the GOP candidate from Any Town", the hometown boy. We will attempt to build a strong base in Republican strongholds of this area. We will emphasize that Steve and his parents live and work in this area.

Steve will seek endorsement from popular Any Town residents, will campaign at places where the locals congregate, will go door-to-door and will institute a telephone calling program to insure that every GOP voter in Any Town knows that Steve is their hometown candidate for the State House. We will also mail all Republican registered households in Any Town twice asking for votes. As a sitting town board member, Donaldson hurts us here. However, by moving faster than him we should be able to get 30-35% of this vote.

Pro-lifers -- Like these voters, Steve is pro-life.

Steve will seek out the leadership of the RTL groups and seek to speak at their meetings, and receive endorsements from their leadership. We will tap them for volunteers and will try to talk them into either mailing their members lists or letting us mail them. Steve will meet with leaders of the local evangelical churches to let them know that he stands with them on the family/abortion issues.

Gun owners -- Steve is an NRA member and wants to protect people's right to own guns.

We will seek endorsements from both local and national gun groups. Steve will also try to get these groups to mail to their memberships or let us do so. Steve will campaign wherever gun lovers congregate -- at shooting matches, shooting ranges on Saturday, etc.

Senior Citizens – Our message here is that Steve's parents are seniors, so Steve understands their concerns.

A very small group of Republicans, but one we can appeal to through Steve's dad. We will mail these folks with a letter from Steve's dad and dad will do some campaigning for us and get Steve into some of the Senior Center meetings.

Establishment Republicans –

Our message to these folks is that Steve is a life-long Republican, has labored hard in the vineyards for any number of GOP candidates, serves on the GOP Central Committee and is a Republican they can trust.

Steve will speak to GOP groups and we will print up a special brochure that touts his work for the GOP and distribute it at GOP events in the district. We will also solicit and win endorsements from GOP leaders and past leaders.

Law Enforcement professionals –

Steve will speak before FOP meetings and reserve organizations. He will seek endorsements from the dozens of police organizations and will draw up a 10-point anti-crime plan.

Campaign Phases

Phase 1: Preparation Phase

During this six months Steve will lay the groundwork for the fall campaign. Here's a short list of the tasks that must be done during this period.

1. File a new committee with the FEC.
2. Open a new campaign bank account.
3. Rent a P.O. Box.
4. Print up a palm card.
5. Call close friends and relatives and hit them up for money.
6. Conduct targeting for door-to-door work.
7. Write and practice new stump speech
- 8 Write & print Why We Can Win (WWCW)
9. Gather lists of GOP leadership and stalwarts
10. Begin publication of Executive memos
11. Begin volunteer file
12. Contact National RTL
13. Contact National NRA
14. Contact all local VFW posts, American Legion, DAV chapters, etc.
15. Write & approve campaign plan.
16. Form Pro-Contract Committee (see Addendum C)

Here's a list of what must be done to prepare for our door-to-door effort.

1. Get precinct data (vote history).
2. Overlay census data on precinct info.
3. Get printout of GOP primary voters, walk listed.
4. Print palm card.
5. Print "Sorry I missed you" door hangers.
6. Get precinct maps.

Also during this period Steve must make contacts and go after the easy money...money from relatives, close friends and his Christmas card list.

Phase 2: Kickoff phase

During this phase the campaign will prepare for and bring off the campaign kick-off as well as begin door-to-door work. We must conduct good research on our possible opponents during this same period.

Here's a list of the things that must be done during this phase:

1. Prepare new bio
2. Prepare good B&W photos
3. Print lapel stickers
4. Write news release
5. Print stationery
6. Assemble media kits

7. Build good media list
8. Write district description with map
9. Distribute media kits
10. Implement first fundraiser
11. Begin door-to-door walks
12. Interview for campaign manager job

Steve must make the rounds of the local media, meeting and talking to every reporter in the district. He will distribute press kits at the same time. We will also send out a fundraising letter explaining to folks that Steve is running and asking for money.

Phase 3: Petition drive phase

We will need to gather xxxx signatures to put Steve on the ballot. That is the primary focus of the campaign during this period.

We will send out one mailing asking people to join with us in our petition drive and asking them to send money as well.

Here are some tasks that must be accomplished during this phase.

1. Hire campaign manager
2. Interview for Finance Director job
3. Begin gathering petition signatures
5. Write letter to Christmas card list.
6. Follow up telephone calls to Christmas card list.
7. Find office
8. Find volunteer staffers

Here's a description of what must be done to gather the signatures necessary to file for the State House:

1. Steve, as he goes door-to-door gathers signatures.
2. Ask volunteers to each gather 10 signatures.
3. Run tables at supermarkets to do the same thing.
4. Get Women's Fed to pass around petition.
5. Ask Christian Coalition to do the same.
6. Attend GOP events and pass around petitions.
7. Conduct petition mailing.

We will raise money by contacting GOP elites, continuing the mail program, and hosting several small events. We should also have at least one major dollar event with a big

name speaker. We will also form a finance committee during this phase.

Fundraising checklist:

1. Find additional lists of campaign contributors.
2. Test the idea of mailing conservative ideological lists.
3. Find list of Any Town High grads (Steve's class) and mail for bucks.
4. Fraternity brothers?
5. GOP types you met/worked with at Convention.

Phase 4: New Year Phase

Tempo of the campaign will increase. Begin to phone all GOP registered voter households with an advocacy script by volunteer phoners.

Also, we will mail our targeted GOP primary voters with a brochure stating what a good Republican Steve is.

We will badger Jones in the press for spending too much of our money.

Our volunteers will distribute flyers door-to-door during this period. The wife letter will be produced and volunteers will begin addressing the envelopes.

First wave of yard signs go up.

It will be crucial for Steve to do the following during the "Pre-election Phase".

1. Solidify support among veteran groups and ask if they will endorse Steve publicly or in their newsletters.
2. Maintain and increase support in hometown, Any Town.
3. Continue to solicit and build on Steve's support in the following groups.
 - a. Gun Owners
 - b. Senior Citizens
 - c. Establishment Republicans
 - d. Pro-lifers
 - e. Law enforcement types
4. Institute neighborhood literature drops. Try to get all targeted precincts lit dropped through use of precinct chairs and floating volunteers.

5. Telephone bank. We must have the telephone bank up and running by early _____ to contact as many voters as possible by the primary.
6. Direct mail. We will be sending out at least three pieces of direct mail; the first needs to be dropped by, the second by, and the third by _____.
7. Fundraising. We must continue to raise money so we can communicate our message.
8. Volunteers need to be organized into groups to find locations for 4x8 signs and yard signs.
9. Steve is the chief asset to the campaign and it is vital that he get out and meet Republican voters. He must do the following.
 - a. Door to Door
 - b. Speaking engagements at GOP events
 - c. Fairs and Festivals
 - d. Parades
 - e. "Hot spot" restaurants and diners
 - f. Community service clubs

Phase 5: Pre-Election Phase

More of the same from above. Mail gets dropped, phone calls are completed, lit drops increase. Roll out the volunteers with a district wide literature drop on the final weekend.

Phase 6: Election Day Phase

The last and final phase will be a culmination of our efforts. There are also a number of elements that must come together at this time. But key is that we insure that our target groups vote.

Make sure we have a presence at all key precincts on Election Day.

Organization

Every campaign has two organizations: the internal organization and the voter contact or external organization. We'll take the internal one first. Here is a listing of the various positions that must be filled by the Smith campaign and the duties that go with each position.

Internal Organization

Campaign Positions

Campaign Manager

(Paid) The campaign manager's job is to run the campaign. Once the goals of the campaign have been set and the plan has been written, the CM's job is to see that the campaign implements the plan, and if it can't, to see that the plan is re-written. Duties include personnel management, supervision of fundraising and media activities, serving as alternative spokesman (after Steve) for the campaign, the day-to-day decision maker and the setter of standards for the campaign staff (such as it is). The CM will work with Mary to insure that a daily summary is completed that tracks each day's contributions, giving the source, amount and cost of every finance program and contribution. In sum, the job of the CM is to make sure the campaign happens.

Media Director

(We will not hire someone to do this job until after the primary. The CM will have to handle these duties until then)

Duties include preparing speeches, writing news releases and radio actualities, setting up press conferences, scheduling media events, responding to media inquiries and hob-nobbing with reporters. Keeping the media list updated and insuring that releases and actualities get sent out are also important duties.

Finance Director

(Paid) The finance director is responsible for organizing and supervising the campaign's fundraising operations. Duties include organizing fundraising events, supervising direct mailing and tracking the results -- (including caging), scheduling (with the scheduler) Steve with large donors, PAC solicitation, and recruiting and working with the finance committee, maintaining the checkbook and preparing the deposits.

Driver/personal aide

The candidate's personal aide (several volunteers) is a vitally important position in the campaign. Duties include driving, keeping the candidate looking fresh (particularly if he isn't) and properly dressed, checking in with the headquarters at each event, insuring the

candidate is fed, rested and properly briefed about each campaign appearance, and keeping the candidate on schedule. If the candidate is lost, looks tired, or stays too late at an event, the personal aide is at fault. This will have to be a volunteer position.

Scheduler

The scheduler (a volunteer) is in charge of the candidate's schedule. Duties include publishing a schedule for the entire campaign staff, preparing a schedule for the candidate, making up a "sanitized" schedule for the press, Writing and sending thank you letters, confirmations and rejection letters. The scheduler is also responsible for keeping accurate files on all invitations and their dispositions. The scheduler should be aggressive and look for scheduling opportunities rather than respond only to requests. Only the scheduler should be allowed to put events on the schedule, and all scheduling opportunities must be cleared with the scheduler before they are agreed to. The CM and the scheduler should meet every day to approve the schedule.

Organization Director –

(Volunteer) The Organization Director is in charge of the field operation of the campaign. Duties include coordinating and liaison with the local Republican leaders, forming our own campaign organizations in each area, liaison with GOP auxiliaries (CR's, YR's, NFRW, etc.) and doing the advance work necessary to insure that Steve's campaign time is well-organized and well-coordinated. A key responsibility will be to insure that our precinct literature drops work successfully.

Voter Contact Organization

Because our primary opponents will have more money than we will, our campaign must put together a voter contact organization for the primary.

To build a base within the Republican Party we must begin now to build a network of GOP workers, volunteers and supporters. Steve has a small political base, having run for office before and having lived in the district for four years. We must carve out our support from among people already committed to the Republican Party, veterans, gun owners and active right-to-lifers. We must have their support to win the primary.

Here are some the tactics we will use to build our organization:

1. We will start a file on Republican activists, and record their support (or lack thereof) for Steve as well as each contact that the campaign makes with them. (Excel?)

2. Just as above, we will start a file on Right-to-Life activists, and record their support (or lack thereof) for Steve as well as each contact that the he makes with them.
3. We will build a mailing list of these folks so that we can hit them up for volunteer support, etc.
4. We will get lists of dates and places where the Republican auxiliaries and other GOP groups are having their meetings, and Steve will attend as many as possible.
5. We will make a list of the top twenty GOP opinion leaders in the Any Town area (including GOP Representatives and local elected officials), and Steve will call on them personally, discuss his plans to run for office, and seek their advice/help/commitment.
5. Steve will avoid all inter-party fights. As a candidate, a good inter-party struggle is guaranteed trouble.
6. Steve will print up a whole bunch of volunteer cards and pass them out liberally wherever he goes.
7. We will schedule coffees in the top xx precincts in the district and have Steve appear at these events and sign up people to help us in the primary.
8. We will appoint Steve Smith Precinct Chairmen in each of these xx precincts and ask them to perform a certain number of tasks for Steve prior to and on primary election day.

The campaign will recruit legislative district chairman who will be in charge of their areas. Precinct Chairmen will work under them.

Every targeted precinct will have its own Steve Smith for The State House Chairman. There are roughly 50 precincts in the 20th House District; we will target the top 20. If we have time, or if we find we have the resources, we will find chairmen for the others, but the top 20 have the priority. It is in these precincts that the election will be won or lost.

It will be the duty of the Campaign Manager, the Organization Director and Steve himself to insure that these precincts have Smith Chairman, and that these Chairmen meet the minimal standards we set for them.

Each precinct chairman will bear the following responsibilities:

1. Walk with Steve Smith when he visits the precinct. Find some other volunteers to distribute literature at the same time.

2. Host a neighborhood coffee or find another family to do so.
3. Organize a sign program -- find at least twenty families who will allow us to put a sign in their yard, and then place the signs in those locations.
4. Insure that the polling places are properly manned with election officials and work (campaign outside the polling places) the polls on Election Day.
7. Address 40 postcards to friends and neighbors asking them to vote for Steve on Election Day.

Starting in _____, the campaign will have campaign meetings. These meeting will be held once a month, and every person who has done anything in the campaign will be invited. We'll brief them on what's happening, how they can help, what Steve is doing, etc. Steve will speak to pump up the crowd, the campaign manager will report on progress, we will share information and show them our flyers, radio spots, etc.

We should also periodically send the organizational leadership an Executive Memorandum. (We can basically combine this list with the various levels of our financial programs.)

We didn't do this last time, and suffered accordingly. Real campaign organizations take effort -- money and time. Lets do it right this time.

The idea here is to involve our volunteers more thoroughly in the campaign, keep them motivated and educated, and tell them in a real way how important they are to us.

Phone Program

Our goal is to call all the Republican households in the district with an advocacy message for Steve Smith.

The campaign does not have the money to hire a telemarketing firm to call these GOP primary voters, so we will have to make do with volunteer phone banks. We have access to a large office we can use at night and on weekends. The office is well lighted and has plenty of parking.

Because we will not have enough volunteers (or phones) to call the list twice, we will concentrate on calling all likely GOP primary voters once with an "advocacy" message. Our phones will call and deliver a short, pro-Steve Smith message, and will ask for a commitment.

Our goal will be to persuade rather than identify favorable voters. We assume that there will be a large turnout of voters because of the Presidential Preference primary and because of the Civil Rights referendum, so we are not going to identify voter for turnout operations, but instead seek to persuade the people who are going to vote anyway, the Steve is the candidate for them.

A sample script might look like this:

"Hello, I'm _____, and I'm a friend of Steve Smith. We need to change the State House, and Steve's the guy to do it because he shares our values. Steve lives right here in Any Town, so he understands our problems. That's why I'm supporting him. Can we count on your support?"

There are approximately xx,xxx GOP voters, which will break down to approximately xx, xxx households. A phone match should locate xx, xxx phone numbers for these households, of which 10% will be bad numbers (xx, xxx good numbers). We can reach xx% of that number with three attempts, for a total reached of xx, xxx. A volunteer can make xx completed calls an hour, and we have an unlimited number of phone lines (through the offices of a local realtor).

If we lack the manpower to make this many calls, we will just call previous primary voters.

If we call for xx hours a night, xx nights a week with an additional xx hours of calling on Sunday afternoon, that will give us xx calling hours per week. We will begin our calling xx weeks out from Primary Election Day and assuming we can keep xx phone lines busy, we can complete xx, xxx calls completed in the allotted time. (Since no volunteer phone bank ever runs at full capacity, we will need this cushion.)

Scheduling

Scheduling of the candidate will be driven by three considerations -- fundraising, media coverage and touching voters. Steve must raise money every week.

Steve must raise at least \$xx, xxx each month from _____ until _____. Fundraising is still the king of scheduling.

Steve will campaign door-to-door in coordination with volunteers. He will be scheduled to campaign wherever large groups of 20th district GOP voters congregate. Steve will

also speak to GOP organizations to recruit volunteers and raise money.

It is the role of Scheduler, Organization Director and the Campaign Manager to insure that Steve is properly advanced, and that when he is scheduled into crowd-type appearances (festivals, etc.) that he is surrounded by enthusiastic and noisy campaign volunteers.

Steve is the single-most valuable campaign asset. If we cannot find good media opportunities, we are better off sending him door-to-door or letting Steve make finance calls.

Research

The Steve Smith campaign must conduct three kinds of research during the course of the campaign.

1. Opposition research on our GOP opponents. By no later than the beginning of we must know all their warts.

- a. Lack of military service?
- b. Poor performance in re voting record?
- c. Contributions?
- d. Scandals?
- e. Find old campaign literature.
- f. Newspaper clips.

2. Opposition research on Steve Smith. We want no unpleasant surprises. The deadline on this will be the same as above.

Communications

Paid media

The campaign will use direct mail to deliver its primary messages. Although expensive, direct mail gives the campaign the best impact for the dollar spent. Here's a listing of all possible media with recommendations and costs.

TV

Broadcast television is simply too expensive and too inefficient for the primary. To get

good market penetration of even a target group of voters, the campaign would have to put at least \$xx,xxx on the air.

We will buy cable TV as an alternative, depending upon the price. We will buy local sporting events and CNN or similar programming.

We will run one spot that tells the world what a great guy Steve is, and why he is running.

Cost for producing one ad: \$xxxx. Airtime will run another \$xxxx for each week.

Radio

Radio is very expensive and inefficient, particularly in a primary where our target voters are such a small subset of the listening public. We will use some radio in the primary, buying spots on conservative talk shows, if we can afford it.

Total cost of radio: \$xxxx including production.

Billboards

Billboards are good name identification builders, but they are expensive and inefficient. Billboards get lost completely in urban areas, and we will not buy them. Name identification amongst the general public will also not win votes in a GOP primary. We may consider boards (if they are cheap) for the general election.

4X4 or 4X8 Signs

The campaign has the option of printing 4X4 or 4X8 signs for each precinct. These "poor man's billboards" can be printed for distribution in _____ and go up in _____, assuming the local area sign ordinances allow. We will still have to assemble the signs and buy lumber to put them up with, as well as pay someone to assemble and place them. Our volunteer organization will have to find locations for the signs.

Signs are also inefficient, being viewed by thousands of folks who can't or won't vote for Steve. But they are big morale boosters for the campaign workers and our supporters.

Bumper stickers

Bumper stickers are basically small billboards that move. I don't think the campaign should bother buying any. Unless our volunteer operation demands them and assists us in distribution of same.

Yard signs

Yard signs are expensive, but not as expensive as other types of media. Because these signs will be placed in people's yards, they are more than just name identification devices -- they show that Steve has support. We will buy large ones and get the lumber donated. The campaign will purchase some of these items in _____ and put up the signs in two waves -- late _____ and mid-_____. We will watch carefully over these signs to insure they are not wasted.

Campaign buttons

The Smith campaign will not buy campaign buttons. They are a money waster and don't win votes. Instead we will by paper lapel stickers which are dramatically cheaper.

Newspapers

The campaign will not buy newspaper advertising. Newspapers are selective media, and thus not efficient, particularly in a primary.

Direct mail

The Smith campaign cannot afford to mail district-wide. We don't have the bucks and it is a waste of money sending mail to people who have no history of voting in GOP primaries.

Instead, the campaign should attempt to mail our base Republican voters and insure we get their support. Assuming that the base consists of those people who voted in either the 1996, 1998 or 2000 GOP primaries, we should have a universe of about xx,xxx names (or about xx,xxx households). We will mail this list three times.

One of the mailings will be a letter from Steve's wife. This will be hand addressed, printed on monarch-sized letterhead, but still bulk mailed.

Our goal will be to mail this list once in February and twice in March when voters are beginning to pay attention to the election.

We can now get the list of people requesting absentee ballots before they receive.

Steve postcards

The campaign will print up a bunch of cheap postcards. Volunteers will be asked to send them to their relatives and friends. The campaign will not pay for postage unless we have

extra money at the end and no place else to use it.

We will also use these postcards for follow-up cards from the door-to-door activities.

Lit-drop pieces

The campaign will print cheap flyers for distribution at shopping centers, sporting events and door-to-door.

Palm Card

Steve needs something to pass out door-to-door when he's campaigning as well as when he meets folks on the street.

Earned media

Earning media coverage is not a big campaign priority. Steve will constantly be on the lookout for media coverage opportunities, but we know they will be few and far between.

All of Steve's news conferences or media interviews will be taped by the campaign. That way we can prove what Steve actually said if he gets quoted incorrectly.

Media kits will be mailed or hand-carried by Steve to all media sources in September. The campaign manager will insure that the media list is updated monthly.

The campaign will institute a number of programs (some pre-primary and some post-primary) to garner earned media. Here are a few:

1. The Campaign Kick-off

A totally bogus event, the fall campaign Kick-off is designed for media consumption. We will send out a Media Advisory before the event, call the media outlets to remind them of the event, and invite our folks to join us for a party.

2. The Debate Challenge

We will challenge Jones to a series of debates. We'll ask him to debate us starting in September and will unveil a list of places, sponsors and dates. If he accepts, we get coverage and an equal footing with him. A no-loser. He will, of course, refuse to debate us as often as we would like, and we will hassle him about it at every

opportunity. We will also schedule Steve to attend as many events that Jones will be attending to share the podium with Jones and drive him crazy.

3. *Challenge Jones to Sign the No New Taxes Pledge*

Stakes out our position. He won't sign it. Gives us something to talk with conservatives, Republicans and businessmen about.

4. *Call for voluntary campaign spending limits*

Challenge our GOP opponents and Jones to voluntarily set a spending limit on their campaign. They'll refuse. We get some ink for being willing to set limits. It won't really limit us, but will limit them.

5. *Blast Jones for Using His Staff to Campaign for Him at Taxpayer's Expense*

If the Clerk of the State House reports show that his staff is constantly traveling back and forth, renting cars, etc., blast him for it.

6. *Letters-to-the-editor program*

We will organize a letters-to-the-editor program amongst our volunteers. We will send out talking points to our organization people. We will urge them to get people to write letters to the papers and tell in their own words why they are supporting Steve.

7. *Steve Smith Fundraisers*

When we have fundraisers there will be a media angle to the events. We will invite the press to cover our events and comp them tickets -- except for whatever private receptions we might hold before the fundraising events.

8. *TV and Radio Talk Shows*

We will make Steve available for talk shows immediately after his campaign kick-off. We won't refuse an opportunity to appear on one of these shows as long as the subject matter isn't obscene or degrading.

12. *Hall of Shame*

As one of our hits against John Jones we will highlight his unwillingness to deal with criminals and never-do-wells in the State House. We will perhaps do some quick and dirty paid media to supplement our hit on this.

13. *Steve Smith's 10-point program to do something for Any State*

Steve will release his plan to do something or another. We will unveil this at a news conference and challenge Jones to explain why he hasn't done these things.

14. *Parade of Endorsements.*

An ongoing project, Steve will seek endorsements from every elected GOP official we can locate. Every time a GOP official agrees to endorse Steve we will take a picture and send a news release to the media. If things are slow they may print it, but even if they don't it tells the working media that the Smith campaign is alive and well and receiving support. This should help us solve our credibility problem.

15. *Others*

As opportunities arise we must be willing to seize them.

Primary Budget #1 (SAMPLE)

Communications

4x8 signs	2,000
Yard Signs	5,000
Lapel stickers	600
Direct mail	51,500
Postcards	500
Palm card/brochure	1,600
Earned media	200
Stationary/printing	1,000
Flyers/door hangers	3,300
TV production (optional)	3,000
TV airtime	5,000
Radio	6,000
Election day materials	500
Slate mailers	3,000
Misc.	1,000
	\$84,200

Organization

Salaries	17,000
Consultant fees	4,000
Headquarters	4,000
Office Equipment	3,000

Phone	2,000
Travel (gas)	300
	\$30,300
<u>Research</u>	
Opp. Research	300
Survey Research	3,000
	\$3,300
<u>Voter contact</u>	
List work	1,000
Phone bank Supervisor	2,000
Organizational materials	500
	\$3,500
<u>Cost of Fundraising</u>	
Direct mail	4,500
Finance Committee materials	300
Events	5,000
	\$9,800
<hr/>	
Total budget	\$131,100

Primary Budget #2 (No TV, no radio and reduced mail universe)

<u>Communications</u>	
4x8 signs	2,000
Yard Signs	5,000
Lapel stickers	600
Direct mail	41,500
Postcards	500
Palm card/brochure	1,600
Earned media	200
Stationary/printing	1,000
Flyers/door hangers	3,300
Election day materials	500
Slate mailers	3,000
Misc.	1,000
	\$60,200
<u>Organization</u>	
Salaries	17,000
Consultant fees	4,000

Headquarters	4,000
Office Equipment	3,000
Phone	2,000
Travel (gas)	300
Misc.	1,000
	\$31,300
<u>Research</u>	
Opp. Research	300
Survey Research	3,000
	\$3,300
<u>Voter contact</u>	
List work	1,000
Phone bank Supervisor	2,000
Organizational materials	500
	\$3,500
<u>Cost of Fundraising</u>	
Direct mail	4,500
Finance Committee materials	300
Events	5,000
	\$9,800

Total budget **\$108,100**

Fundraising Plan

This revised fundraising plan should help us plan our fundraising in the last days of this campaign.

Our target will be \$xxx,xxx and we will have to work hard to achieve that goal.

A plan is only as good as the people who carry out that plan. Writing a finance plan is a relatively easy task. The tough part is executing the plan.

Below are listed the major fundraising categories -- the sources of our campaign budget from here till Election Day. The rest of the finance plan explains how we will raise this money.

Example:

Cash on Hand	\$1,000
Major donors	60,000
Finance Committee	30,000

Smith family	2,000
Direct mail	9,000
Events	25,000
PAC's	3,000
 Total	 \$130,000

Raising money is going to be the toughest part of our plan.

Steve will have to raise most of the money himself. We must begin with Steve's family and his personal friends, acquaintances and former co-workers.

Here are the first things that must be done:

1. Steve will first call on his family and close personal friends and ask them for a contribution. He must raise \$10,000 from these folks during the summer months of the campaign. The people that say "yes" will get a follow up letter from Steve thanking them and telling them where they can send their check -- also enclosed will be a self-addressed envelope for their convenience.
2. We will find the heaviest hitter we can and recruit him/her to be Chairman of the Steve Smith Campaign, or Chairman of the Finance Committee.
3. We have some lists of major Republican donors in the Any Town area, so our job is to combine them into one master list. Steve will be scheduled to visit with anyone who gave \$1,000 or more to other GOP candidates.
4. We will look into instituting a direct mail campaign to mail proven GOP donors in the district in _____. If we are successful, we will expand our mailing to Republican donors all over the Any Town area. We will emphasize our opposition to John Jones and what a liberal he is.

Major Donors

The Steve Smith campaign must establish a major donor program to raise the money we must have to win the general election. We will use direct mail and small events to raise the money we need to keep the doors open to our headquarters and meet the overhead, but the big money we need to communicate with our voters must come in large chunks, and that means major donors.

For the purpose of this plan we will break down our plan of attack on major donors into two categories: The Finance Committee and candidate solicitation.

Candidate Solicitation

Steve must personally raise \$xxxx every week.

Why must Steve do this? Because the candidate is the best fundraiser in the campaign. People will give to Steve that will quite simply give to no one else. It is the job of the campaign to find and schedule prospects for Steve to talk to and solicit; it is Steve's job to meet with these people and close the sale.

How will we do this?

1. Develop a list of prospects. The prospects will come from three sources -- Steve, his finance committee and lists of donors to previous campaigns.
 - a. Steve needs to make a list of friends and acquaintances. This list should include anyone of substance who has told him that they support him.
 - b. The Finance Committee needs to do the same thing. Each member must come up with a list of potential donors. They should themselves ask for donations from members of this group, but should also forward a list of names that Steve should see. Hopefully, each Finance Committee member will set up appointments with potential donors for Steve and go with him to the meetings.
 - c. We will ask local GOP office-holders for their lists of large contributors.
2. Schedule Steve to meet with people who can give \$500 or more. Have Steve actually go to see these folks and pitch his wares, explain why he can win, why he should be elected, and why he needs the money. Steve must always ask for a specific amount, and try to never leave without a check for at least some amount.
3. Prepare a Finance kit for Steve and the members of his Finance committee. The finance kit will explain who Steve is, why people should give to his campaign, the legal guidelines that must be followed and how the money will be spent. We will make a bowdlerized version of the budget for inclusion in the finance kit.
4. Steve should be scheduled to see at least one potential contributor every workday, or five a week. If Steve gets a response from only half of his prospects he should more than meet his goals.

Steve's goal is to personally raise \$xx,xxx by the end of the primary campaign.

Finance Committee

Steve has to ask people to serve on the Finance Committee. Our goal should be to find at least 20 people to serve on the committee and one person (perhaps two) to serve as chairman.

The committee must be completely recruited by September 1st. Each member should give at least some money to the campaign before they can sit on the committee. Each member of the Finance Committee must commit to raising a set amount of money. The minimum goal for each member will be \$xxxx, and we will try to get most of them to commit to raising \$xxxx.

It is psychologically daunting to ask a person to help raise \$xxx,xxx. But if each person is asked to raise only \$xxxx, that seems much more reasonable. Also, each member of the Finance Committee must agree to send in one check a week. This gives each committee member an easily understood, easily attainable goal.

The Finance Committee will have monthly meetings, but attendance will not be mandatory -- these are busy people, and as long as they do the work we don't have to bother them to come to meetings. The meetings will be informative, workings sessions of short duration. Steve will attend.

The Finance Committee Chairman, along with the Finance Director, will be responsible for follow up with the committee members.

Here's how the Finance Committee will raise money.

- a. As mentioned before, each Finance Committee member will develop a list of prospects. Each committee member needs to make a list of friends and acquaintances who he thinks could give to Steve.
- b. Each member should make appointments to see these people and ask them for a donation. Also, each member should forward a list of names to the Finance Committee Chairman who Steve should see. Hopefully, each Finance Committee member will go with Steve to the meetings.
- c. When necessary, Finance Committee members will help sell tickets to events, but that is secondary to the personal solicitation program.
- d. Prospects should be asked to give money to Steve's campaign for the same reasons that Steve uses in his pitch. Steve can win, he should be elected, he's a great guy who has given so much to our community and he needs the money. The

Finance Committee must always ask for a specific amount, and try to never leave without a check for at least something.

e. The campaign will produce finance kits the members of his Finance committee. The finance kit will explain who Steve is, why people should give to his campaign and the legal guidelines that must be followed. Finance committee members should use the kit as necessary.

The Finance Committee goal is \$xx,xxx. (not including tickets sales, etc.)

Major Donors Total -- \$xx,xxx

Events

We must organize several fundraising events through the coming months. Here are a few ideas coupled with some idea of the money we can raise:

Home parties -- Get a large donor to donate the use of his/her house for the purposes of a cocktail fundraiser. Charge people \$50 per person and sell tickets. Some people will buy tickets just so they can see the big house and hob-nob with the wealthy. We should attempt to hold at least one of these per month and try to raise \$1,000 at each event.

Small events -- These events will raise some money, but are organized and promoted at least partly to build good will and get some exposure for Steve. We should attempt to put on these types of events in various communities around the district. Low ticket prices guarantee that not much money will be made, so only run these events if staff time is negligible.

Any Town Large Donor Event -- We can use this event to round up contributions from people who will not respond to personal solicitation, but will buy a ticket to a classy event. This event should be hosted either at the largest, classiest house in Any Town, or at the Country Club or other suitable location. Ticket price will be high, and we will have to spend some money on food, decorations, etc. This event will also have to feature a "star" as a speaker. We will offer a special reception in advance of our event for a higher price.

Direct Mail

The direct mail fundraising program will do two things for the campaign -- raise some money and broaden the financial base of the campaign.

Because DM fundraising has possibly the highest cost for dollar returned, our net for DM

programs is small.

On the other hand, direct mail fundraising is a great method of allowing many people to participate in their own small way with your campaign.

There are two types of direct mail fundraising: prospecting and in house mailings. Prospecting is what we call mailing fundraising letters to people who have never given to the Smith campaign, but have given to other GOP campaigns. A good return on a prospecting letter is 1 to 2%.

Sometimes prospecting letters lose money, but that's OK because of the second category of fundraising -- direct mailings to your house file.

House file direct mail is simply mail directed to people who are already donors to your campaign. Your contributors should be asked to give at least once every five to six weeks. Returns from your house file will run 5-10% of those mailed.

Prospecting should be done in _____ and _____. We will mail the house file in late _____, _____, _____, _____ and twice in _____.

PAC's

We will selectively market Steve to the PAC community. A PAC kit will be prepared and mailed in _____.

PAC goal -- \$xxxx

Smith Family

Various members of the Smith family can give money to the campaign. Our goal for them is \$2,000.

Addendum A

John Jones pluses and minuses

+

Incumbent Representative
\$ in bank
Can raise more bucks
Democrat
Years of governmental experience
Some big business defections
Support from defense interests
Black support
Decent constituent service
Front-runner/winner image
Folksy, good ol' boy
Moderate image
Personally wealthy

-

Ultra-liberal
Incumbent
Miserable speaker
Drives BMW
Now in minority
Incumbent
Democrat
Pro-abortion

Addendum B

Strategic grid

The grid is a depiction of the likely positioning of the candidates vis-à-vis each other. The top left box depicts what Steve wants the voters to know or think about Steve on Election Day. The top right box depicts what Steve wants voters to think about Jones on Election Day. The bottom two boxes picture Jones's probable positioning strategy.

Steve/Steve

Normal Citizen
An honest man of integrity
Young blood, aggressive
A working Californian
Republican
Family man
Common sense conservative

Steve/Jones

Typical incumbent
Out of touch
Old and tired
Soft on death penalty
Never had a new idea
Old-style politician
Liberal Democrat
Big Spender
Supports status quo

Jones/Jones

Still a good old boy
THE Representative
Powerful Democrat
Moderate
Brings home the bacon
Working hard for 20th CD
Will save the bases
Accessible
Gets things done

Jones/Steve

Insignificant insect/loser
Crazy right-winger
Tool of Pat Robertson
Ideologue
Republican fat cat
Against public education
Against "Choice"