How to Win Your Local Election Guide

ngpvan

An all-inclusive campaign guide to learn what it takes to run for political office and win.

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Why Run for Local Office?

If you're starting to read this guide, congratulations! You're interested in learning how to win your election and we're so happy that you're considering running for office! While you may be ready to jump into the political arena, you may be wondering, "How do I run for office?" Every race and district is unique, but we wanted to create this guide to provide guidance and insight into how you can start building your campaign operations the right way.
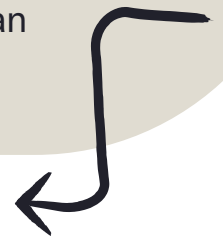
Reason(s) for Running

The number one question you will be asked is "Why are you running?" With this in mind, you want to make sure you have a well-thought-out answer. It doesn't have to be long or complex, but you want it to be personal. Maybe you're fighting for a better future, advocating for a cleaner environment, or you don't like the conservative policies of the current elected official in your district. Whatever your reasoning, make sure you have a clear reason for running and explain how your campaign will bring about the change you believe needs to happen.

Time Commitment

Running for office isn't easy. It typically requires a significant amount of time, resources, and energy to run a successful campaign. It will affect your day-to-day schedule, and depending on what you commit yourself to, it can quickly overwhelm your schedule. While we'll discuss this later as well, if you're elected, you'll have even more commitments to fit into your schedule. Make sure to consider the time commitment before officially declaring your candidacy.

When preparing for your campaign, it's important to note that research should be done before, during, and after your campaign. However, there is an interplay between resources and time. If you have or can raise substantial financial resources, you can hire people to do certain things like buying and updating software, managing volunteers, phone banking and canvassing, and more.

If you don't have or can't raise those resources, you'll need to do those things yourself or find volunteers to help you, which means more of your time will be occupied with that work. We'll discuss how to plan a budget and how to fundraise later in this guide, but you should know that time is inversely proportionate to the resources you have. The more resources you have the less time you need to spend on procedural tasks you can outsource to volunteers or staff. Fewer resources mean you must do more yourself or find others who can help you out.

People You Will Meet on the Campaign Trail

There are a lot of people you will likely want to consult with before you even announce your campaign. The goal here is twofold: let people know you're considering running for office and start to understand the level of support you have from local leaders whose opinions sometimes carry weight with local voters. While it's not necessary to have these conversations, usually, it plays to your benefit to at least touch base with some of the key stakeholders in your community.

Getting support from community leaders before you run can make a world of difference in your race. When other potential candidates see how much support you have, they may decide not to jump in — clearing your path to victory and helping you avoid an expensive primary.

Here is a list of some of those key stakeholders:

State, district, or county party chair(s)

These individuals serve as the formal leader of the Democratic Party in your region. While they typically cannot support candidates in contested primaries — where two or more Democrats are running for the same office — it's usually good practice to introduce yourself and let them know your plans. Local party people are also tuned into what's going on in local politics. They may have heard of other people thinking about running for that same office, and they can be a good source of potential volunteer help if you do decide to run. Some local parties have budgets to help candidates with campaign needs like print material, yard signs, and other campaign necessities. Some party committees will endorse candidates, and the earlier you make a good impression, the more likely you are to win an endorsement, which, depending on your district, can be very meaningful. Every state has a State Democratic Committee. You can find yours by visiting democrats.org (https://democrats.org/who-we-are/state-parties/state-party-websites/). The state party can put you in contact with your county committee or local neighborhood committee.

Democratic elected officials

These elected officials may serve as valuable connections to other volunteers, donors, or supporters that can help you win. These people have run successful campaigns and, if they like your reason for running, they may help you out. They also know the local electorate very well, and they usually have their finger on the pulse of what's important to voters at any given time. This group of stakeholders has information about policies that might be in place or legislation that might be coming down the pike. If you're advocating for a policy or law change, it's always good to know whether something is already in the works and local elected officials are a good source for that information.

Other notable community figures

These may be former elected officials, past leaders of community organizations, religious leaders, union leaders, coaches, teachers, or anyone else you believe has information about what voters might want or need, and who could potentially help your campaign. If you do decide to run, find these people and get them on board quickly.

Grassroots organizations

These are groups of people who band together for a common cause at the neighborhood level. They may be fighting for a change of law or a specific policy, like all-day kindergarten or more favorable immigration policies. They are usually very visible and very vocal in the community, and they usually attend local government meetings. Some groups are just a few people, while others number in the hundreds or even thousands. If the reason you are running corresponds to the mission of a local grassroots group, you may gain some early supporters. Many congressional candidates have won their races with the support of a few key grassroots groups. By finding advocacy organizations in your area that are fighting for issues that you could change if you were elected to office, ou may gain early supporters that can help you win your race.

Is Your Family on Board?

You will want to talk to your family first before you decide to run for office. As we discussed, running for office can cause a big shift in the amount of time you can spend doing certain things. Unfortunately, there are only so many hours in a day, and by running for office, you will almost certainly be committing time away from your family and friends. Going canvassing, attending fundraisers, doing call time, and other campaign events will require your attention and will take time away from your job and your family. Can you afford to take time off? Will you need to take a leave of absence? Can you afford it financially? These are all questions you need to answer before you run. Too many candidates have started races in haste and dropped out because the campaign was too time intensive. Others found out the hard way that their jobs prevented them from taking elected office.

Remember, if you get elected, you'll have official meetings, committee meetings, and expected attendance at other community events. Even if you get elected to an office that pays a full-time salary, you'll still be spending time away from your family. So, make sure to understand the time commitment as a candidate and an elected official before making your decision.

With those conversations out of the way, let's look at what the election cycle typically looks like. The election calendar will determine the work you need to complete on your campaign and the timeline in which those tasks must be finished.

The Election Calendar

Every state has an election calendar that calls out important election dates. For example, here's a copy of <u>New York State's 2022 Election Calendar</u>. The election calendar will list things like:

- The last date you can register to vote in a primary or general election
- The first day to circulate nominating petitions
- The last day to file nominating petitions
- The last day to challenge nominating petitions
- The last day to vote early or send in absentee ballots
- Dates for financial reporting periods
- Dates of the primary election or caucus and general elections

Once the election calendar is set, your campaign must follow these dates and perform necessary functions by those dates. For example, a nominating petition is a piece of paper on which you must obtain the required number of signatures from voters in your district. Different office positions require a different number of signatures. You might need 500 Democratic voter signatures to get your name on the ballot for state Senate, but you might need 2,000 to get your name on the ballot for U.S. Congress. If the first day to circulate petitions is February 3, but you start in January — you might violate the rules and those petition signatures gathered in January might not be counted toward your total. Similarly, if the last day to submit petitions to your county election board is March 15, and you turn yours in a day late on March 16, you may not be eligible at all, regardless of how many signatures you collected.

Make sure to find out what the election calendar looks like in your state and set your own campaign calendar around it.

Qualification

Every state has different qualification measures to run for office. Oftentimes, there are qualification measures that need to be met before you can even consider running for office. These are often called "ballot access requirements" or "ballot qualifications," though the term may be different based on your state and district.

Typical ballot access requirements include age and length of residency in the district, though some require you to be a naturalized citizen, like if you were to run to be the President of the United States. In some states, having certain criminal convictions could prevent you from becoming a candidate.

Websites like Ballotpedia will often list ballot access requirements, like this link for Pennsylvania candidates, but the best place for you to go is to your Secretary of State's website. For example, Pennsylvania's official "Running for Office" page has official details and an official election calendar. You can also download a candidate packet that gives you more information on legal requirements, dates, filing fees, reporting guidelines, and more.

Most states hold caucuses or primaries to decide which candidate will represent one of the major political parties in the general election. Understanding the ballot access requirements and the election calendar will tell you by when those requirements must be fulfilled and the type of paperwork that needs to be submitted.

For instance, in Pennsylvania, candidates must declare their intention to run by filing a candidate affidavit and an ethics statement and paying a filing fee. They must also submit a requisite number of signatures on a nominating petition by a certain date to be considered a candidate on the primary ballot.

Some states require you to file additional forms with the local, state, or national election administrators.

Every state has a process by which a candidate can be invalidated or have their candidacy challenged. You don't want to declare your candidacy only to be challenged by the opposition and then get kicked off the ballot because you didn't read the rules. For instance, if the office you seek has a minimum age requirement of 21 years old, but you are only 18, you may be removed from the ballot if challenged.

Again, it's important to check with your state election administrators (typically the Secretary of State's office) or local election administrators (like your county clerk's office) who will have instructions on what you need to do to qualify to be placed on the ballot. Often, these details can be found on the election calendar. Make sure to review these needed qualifications in detail before you officially declare your candidacy.

Primary Election

In states across the country, there are varying election timelines, but the primary election always takes place before the general election. Primary elections serve to nominate a party's preferred candidate for the general election. Some states use caucuses instead of primaries, which is a different election format, but the result is the same — voters choose their preferred candidate to move forward to the general election.

There are two main types of primaries in the United States: open and closed primaries. Open primaries allow voters to choose which primary they want to vote in. Closed primaries allow voters who have declared a political affiliation to vote in that primary. In a closed primary state, voters who are registered as a Democrat can only vote in the Democratic Primary, while Republicans can only vote in the Republican primary. Closed primaries generally require voters to cast ballots only for the party of their registration. In these states, independents and non-affiliated voters cannot participate in the primary (with some exceptions). That means they can't be candidates and they can't vote for their preferred candidate. When you check ballot access requirements, make note of the primary or caucus type in your state and any registration requirements that might be in place.

States have different guidelines as to who can vote in what primary election and the steps they need to take to vote in those primaries (i.e., declaring a party with the state).

Verify you are talking to likely primary voters by using voter files like VAN or SmartVAN to target those with high primary turnout scores or those who have voted in several of the past primaries.

If you're in a competitive primary with more than one candidate of the same party, you want to make sure you spend more time talking to likely primary voters first because you must win the primary to advance to the general. As a registered Democrat, you don't want to spend too much time talking to independents or Republicans unless the focus is to convince them to change their registration to vote for you in the primary. A better course of action is to use voter software, like VAN, to find Democratic voters in your district who are likely to vote in the primary.

Competitive primaries can be difficult because you're typically running against someone who has similar beliefs. However, you want to make sure that you're drawing distinctions between your campaign and your opponent's campaign so that voters understand why they should vote for you.

If you're not in a competitive primary, you can use this time to shore up your support amongst likely supporters and ask them to support or volunteer for your campaign. By connecting with your likely supporters during the primary election, you can hopefully energize them to vote in the primary and encourage them to help support your campaign by volunteering their time.

One of the most important things you can do to prepare for your primary is to use software that helps you find and engage with supporters and donors. For instance, 84% of down-ballot candidates (city and county council members, mayors, commissioners, school board directors, district attorneys, local judges, etc.) that used NGP VAN software won their 2022 general election because they put that software in place earlier in the year and used it to engage supporters, raise money, and contact voters well in advance to the primary. The work those candidates did early in the year paid dividends not only in their primary election, but all the way through to the general election.

General Election

Election Day happens on the first Tuesday after the first Monday in November every year. While some states have different primary elections that can lead to multiple candidates from the same party running together, typically the general election is when candidates of different parties are running against one another. For the general election, you should focus on turning out your supporters, persuading undecided voters, and potentially convincing registered voters of the opposite party to vote for you instead of your opponent.

The details of each general election are left to the individual state, making it important for you to understand how each state conducts its election and how many votes it will take to win. For example, some states count the winner as the person who has the most votes, while others require the winner to get a majority of the vote: at least 50% plus one more. If no majority is reached in those states, they take the top two vote-getters and advance them to a head-to-head runoff.

Even though the general election can seem far away to a candidate deciding whether to run in January, understanding the type of election you will face can influence your planning, staff allocation, and even how and when you spend resources.
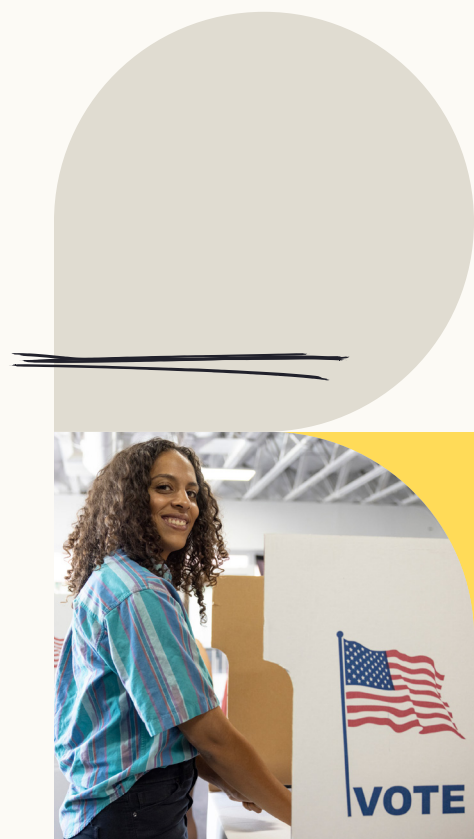
Calculating Your Win Number

Once you understand the type of primary and general election you face, and the rules for getting on the ballot, you should start researching historical election information to determine the number of votes you will need to win. This number of votes is called your "win number." You'll need to calculate a win number for the primary and the general election.

Analyzing your district is the first step to understanding the voter base and figuring out how you can win. Every candidate always believes they are better than their opponent or their message is different or better. And sometimes they're right. But in most elections, the vote count usually progresses down party lines. Democrats vote for Democrats, and Republicans vote for Republicans. The winner is usually the candidate who convinces the most independent or non-affiliated voters to vote for them or mobilizes their base to get out and vote better than the other. In primaries, the candidate who has their finger on the pulse of the local issues usually wins.

Understanding the voters in your district and how those people voted in past elections is the best way to figure out how they are likely to vote in future elections and whether you have a chance to win.

There are a few different steps to determine your win number, but they all require three important points of data:

1. **Who won** — the raw vote totals and historical election data.
2. **The composition of the vote** — how many members of each party voted.
3. **The total registration of your district** — how many people can vote.

The combination of this data provides a look at past election cycles within the district and gives you a baseline understanding of how many people are likely to turn out and vote for you.

Historical Election Data

Historical election data are previous vote results in any given election. This information can typically be obtained from your local election bureau, county clerk's office, or Secretary of State's office. In some counties, this information can be found online, in other areas it can be printed or bought from the local election board.

When trying to decide what the vote count will be in your race, look to similar races that occurred in the past in your exact district. If you're running for state representative, make sure to look at prior state representative races in your district. If your district has changed since the last election, you'll need to do a precinct breakdown and look at the individual precincts that make up your new district. That means you might need to look at the prior race for your state representative and the neighboring district.

Look at the table below for general election results from a fictional state representative race.

Step 1

You go to your county election board and ask for the results from the last state representative race in your country. You get these results:

Mary	Democrat	9,000 votes
John	Republican	6,000 votes
Tim	Independent	2,000 votes
Total Turn Out	**17,000 votes**

You find that Mary Democrat won the General Election and was elected State Representative with **53%** of the vote (9,000 / 17,000).

Step 2

Then you look at the primary election results for those same races, starting with the most recent past election.

Democratic Primary	
Mary	Democrat	5,000 votes
Republican Primary	
John	Republican	4,000 votes

Step 3

You look back at the election from four years ago and find these results:

Mary	Democrat	9,400 votes
Mike	Republican	8,200 votes
Lori	Independent	1,000 votes
Total Turn Out	**18,600 votes**

Mary Democrat won that race with **56%** of the vote.

At face value, those historical election results might look promising.

Step 4

Then you look at the primary from four years ago:

Democratic Primary	
Mary	Democrat	5,000 votes
Phil	Democrat	4,000 votes
Republican Primary	
John	Republican	2,000 votes
Mike	Republican	4,000 votes

These results look promising as well. The Democrats seem to have more voters in the primary and more voters in the general. But to be sure, we need to look at the total voter registration and party breakdown.

Registration

Every state makes voter registration rolls available to the public. You can see how many voters are registered, which party they are affiliated with (if the state requires them to register with a political party), and other basic information about them. Some states provide this information on paper, while others have it available online or can provide it on a disk or in a spreadsheet. Depending on the size of your district, managing that information can become unwieldy. Imagine trying to open a file of a voter database with nine million registered voters. Unless you're running a supercomputer, that kind of file is likely to crash your computer. Thankfully, NGP VAN makes the voter file available as part of its VAN and SmartVAN products, where you can access all the registered voters in every district across the country.

By figuring out the partisan breakdown of the district, you can get a better understanding of what kind of approach you should take to achieve your win number through voter targeting.

Let's dig into the earlier example with some more detail.

Step 1

From the voter file, we can learn the current voter registration numbers in your district:

Registered Democrats	11,200
Registered Republicans	9,600
Registered Independents	4,400
Other Party Registrations	1,200
Total Registration	**26,400**

Step 2

And from the prior election, the registration looked like this:

Registered Democrats	11,200
Registered Republicans	10,100
Registered Independents	2,700
Other Party Registrations	1,700
Total Registration	**25,700**

Step 3

You compare that to the registration in place during the most recent past election:

Registered Democrats	11,000
Registered Republicans	10,000
Registered Independents	3,000
Other Party Registrations	2,000
Total Registration	**26,000**

You see that total registration has ticked up a few hundred total voters over the past few years, growing from **25,700** to the current registration of **26,400**. You also see some movement between parties. There is a higher percentage of Democrats and Independents than there was before. That could be significant. Let's keep digging.
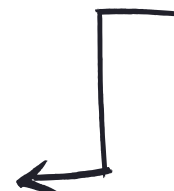
Since 18,600 people voted in the prior election, the turnout was 72% (18,600 total voters divided by 25,700 possible voters).

Estimate Turnout

The prior race happened in a presidential year, and your race is in a presidential year too. The candidate in the prior election was a first-time candidate, and you are a first-time candidate as well. There are many similarities to the prior election so you believe your election will be most similar to that prior election.

To determine the likely turnout in your election we multiply the expected turnout of 72% by the current registration of 26,400 to get an expected turnout of 19,008 total votes.

In a typical election, you're looking for 50% + 1 vote, which means your win number is 9,505 ((50% x 19,008) + 1). Therefore, you must plan to identify at least 9,505 voters to cast their vote for you. That is your win number!

If there are more than just two people in the race, you might not even need to hit your win number to win, because a third candidate can pull votes from your opponent and make it harder for them to beat you. However, a third candidate can also pull votes from you.

Remember, most voters cast their vote for their party registration. Democrats vote for Democrats, Republicans vote for Republicans, and independents usually lean one way or another. In these cases, it's good to confirm the numbers by understanding what the partisan turnout is likely to be. This gives you yet another level of understanding as to whether winning your race is possible.

Determining the Expected Partisan Turnout

Remember, our likely turnout is expected to be approximately 19,008 total votes and your win number is 9,505 votes. Now we want to figure out how many voters from each party will likely vote.

Now let's multiply the expected turnout by the current partisan registration figures to determine the likely partisan vote you can expect. We'll use the following formula:

Expected Partisan Vote = Expected Turnout multiplied by Partisan Registration

The partisan vote would be expected to break down like this:

- **Expected Democratic Turnout** = 72% x 11,200 = **8,064**

- **Expected Republican Turnout** = 72% x 9,600 = **6,912**

- **Expected Independent and Other Party Turnout** = 72% x (4,400+1,200) = **4,032**

If everyone voted along party lines and there were three candidates in the race, you'd expect to win by just over 1,000 votes. If there is no independent candidate in the race and it's just a Democrat versus a Republican, then the independent voters will likely cast their votes for one of the other two candidates.

While they may choose to not vote at all, independents will likely split their vote with some going to the Democrat and some going to the Republican. If you can get most of that split, you can guarantee a win. If all those votes went to the Republican, the Democrat could lose. That would look like this:

- **Democratic Vote** = **8,064**

- **Republican Vote** = Expected Republican Turnout (6,912) + Expected Independent Turnout (4,032) = **10,944**

Again, it's unlikely any single party or candidate will receive all the independent votes. There will likely be some split. You can use your win number to determine how many other votes you need to all but guarantee a win and reach your win number.

With a win number of 9,505 and a likely Democratic turnout of 8,064, you need to find another 1,441 votes to hit your win number. Here's that calculation:

- **Remaining Votes Needed** = Win Number (9,505) – Expected Democratic Turnout (8,064) = **1,441 votes**

That means you need to find 1,441 among all the other expected voters, including 6,912 Republicans and 4,032 independents and other voters. This is called a "persuasion audience." Because they're not generally inclined to vote for your party, you'll need to persuade them to vote for you.

Taking another look at past election results, you see that independents didn't pull as many votes as they should have. Their candidate got 1,000 votes when they likely should have gotten closer to 1,200 or 1,300 votes. You can also see that the Democrat pulled more than expected (9,400). This discrepancy was likely caused by independent voters (and possibly even Republicans) casting votes for the Democratic candidate. This possibility is confirmed by research about voting dynamics which shows that independent voters often split their vote down party lines. This means that it's more than likely you'll get a part of that independent vote anyway, and you probably don't need to persuade all 1,441 voters. You can confirm whether that is true or not by speaking to those independent voters, and that's exactly what you'll do during the voter contact phase of your race.

For now, you've got registration information and historical results, and both seem to point to positive results for the Democrat in the race. You've calculated your win number and it appears to be an achievable number. If you need to persuade voters to hit your win number, it seems feasible to do so.

The numbers are looking good, but let's proceed to one more detailed check by doing some simple targeting and calculating detailed precinct goals and benchmarks.

If you're not sure where to find voter registration information or historical voting information for your district, remember **NGP VAN offers software with detailed voter registration records that are constantly updated and made available for all 50 states**.

Calculate Your Win Number Review

To calculate your win number, you need:

1. **Who won** – the raw vote totals and historical election data.
2. **The composition of the vote** – how many members of each party voted.
3. **The total registration of your district** – how many people can vote.

As you're researching the district, remember to ask questions like:

- How many voters have turned out in the past?
- Were there special circumstances to consider in those election years?
- Who was running for office and how did they perform in the district?
- How close were past races?
- How many members of each party came out to vote? What was the split?

Also, look at races at the top and bottom of the ballot. If you're running for state representative, look at races for state Senate or governor or even the U.S. House race. You can also look down-ballot to the individual districts that make up your larger district, like those for school board or city council. Were there some areas that performed well for Democrats? Will those same areas embrace your message?

Remember to look back at similar cycles. Odd-year elections are typically more comparable to other odd-year elections. Your race may not have been on the ballot for several years, so make sure you check the historical data from years your race was on the ballot, as well as how those same district voters are voting in races when your office was not on the ballot. A similar election isn't necessarily the last election — a presidential election cycle will have a higher voter turnout than a midterm cycle, for example. Find the past race that is most like yours for comparison to help develop your campaign plan.

Be sure to note that district boundaries typically change after the decennial Census which can lead to significant swings in vote totals in the same "district." If your current district boundaries have changed significantly from what they were before, your analysis gets a little bit more complex because you will need to dig into the individual precincts that make up your new district. Precincts are smaller geographic areas within your district. Even if your district boundaries have not changed, it can be helpful to analyze the precinct results to get a better understanding of the voters in your district.

Again, this is where software from NGP VAN can be a huge help. Rather than piecing together spreadsheets from disparate election results, a simple search in VAN or SmartVAN can yield some of the precinct results you want, cutting hours of research time into mere minutes. Consider using our software in conjunction with historical election data to achieve the best precinct-level analysis possible.

Targeting

In the previous calculations above, we've been looking at your district overall, but districts don't vote, people do. In order to ensure the best targeting for your campaign, you need to consider the voting patterns of the individual voters within your district. In every campaign, there is a limited amount of time and resources. With this in mind, it's critical to target your voter outreach efforts to use your time and resources wisely. It's unlikely that you will be able to contact every voter in your district, and it's not the best use of time or resources to try to do that. To win an election, you typically need 50% of the vote, plus one vote. With that goal in mind, after calculating your win number, you'll want to break that number down into vote goals.

Vote Goals and Benchmarks

Electoral districts are broken down into smaller groups called precincts, though this name can vary from state to state. The precinct is usually the smallest unit of an electoral district and the number of voters per precinct will also vary from state to state and county to county, from a few dozen to a few thousand people. Some districts will have just a few precincts, while U.S. Congressional districts can often have hundreds of precincts. The same precinct will be found in multiple levels of office. For example, Ward 4 Precinct 7 of Mt. Lebanon, Pennsylvania, falls into all the local school board districts, the Municipal District for the 4th Ward, the 42nd State Legislative District, the 42nd State Senate District, and the 17th U.S. House District, among others.

Voting patterns and behavior often vary from precinct to precinct. One precinct could have a 55%-45% Democrat to Republican ratio while the precinct right next to it could be 70%-30% Republicans to Democrats. If your win number calls for 9,505 votes and you have 10 precincts, on average, you're looking for approximately 950 votes per precinct (9,505/10). But if you have a precinct that only has 400 registered or likely Democrats, it's not likely you're going to reach your target of 950 votes in that precinct. You might also have a single precinct with 4,000 Democratic voters, and assuming you only need 950 votes in that precinct would be drastically undercutting what you need to get to reach your overall win number. You could build your margin up

in that precinct to help bolster vote gaps elsewhere. Therefore, it follows that your win number shouldn't be divided up equally among precincts.

It's important that when you calculate your win number, you also look at voter information down to the precinct level and do a precinct-by-precinct analysis to set a vote goal or benchmark for each precinct.

A "vote goal" is a goal for the number of votes you hope to achieve in each precinct. Adding all your vote goals per precinct should add up to or exceed your win number. This type of voter targeting allows you to benchmark your precincts and determine your likely votes and the number of persuasion votes, if any, you'll need to bring to your side for the win.

Part of the benchmarking and vote goal process is to create a precinct priority list. This is a list of the precincts that are most instrumental to your winning strategy. Time is a precious resource for any campaign, and even the biggest campaigns can't afford to waste time. Vote goals and benchmarks tell you which precincts offer the most efficient path to victory. That's not to say you should ignore any precinct in your district, but when time and money get tight, as they always do at some point in every campaign, your precinct vote goals and benchmarks help you make tough decisions on where to allocate resources.

Benchmarking is a manual process and different strategies can be employed for different races. In all cases, this strategy is informed by previous voting results and an educated guess at the current race's turnout. Again, in all cases, priority precincts are those which will bring in the most votes for the candidate. These are "must-win" precincts for the overall vote goal to be met. These priority precincts are identified and then noted in the campaign plan.

Most campaign managers will refer back to their precinct vote goals weekly to determine whether they are reaching their goals or falling behind in any particular area. Frequent reviews of the precinct priority list can help a campaign pivot and address issues before they turn into problems.

Precinct	Dems	Rep	I&O	Total Registration	Likely Voters At 72% Est.	Likely Dem Vote At 72% Est.	Vote Goal 50% + 1	Need to Persuade (Vote Goal – Likely Dem Vote)
1	350	350	50	750	540	252	271	19
2	400	350	0	750	540	288	271	-17
3	300	50	0	350	252	216	127	-89
4	400	600	40	1,040	748	288	375	87
Totals	1,450	1,350	90	2,890	2,080	1,044	1,044	0

The table above shows a district with four precincts and a total registration of 2,890 voters, with 1,450 of those being Democrats. Assuming a 72% voter turnout, we'd expect 1,044 Democrats to turn out. Assuming 50% + 1 as a formula across each precinct, you can assume a vote goal for each precinct and then subtract that from each precinct's likely Democratic turnout to determine how many, if any, other voters you'll need to persuade.

You'll see Precinct 1 might require you to pull 19 additional voters on top of the Democratic vote to reach your target. There are 50 voters registered as independent or other parties, which means you'll need to pull just under half of them (if all Republican voters vote for the Republican candidate). However, in Precinct 3, you'll notice the heavy partisan lean toward Democrats gets you more votes than you need in that precinct, giving you 89 votes to spare. That can help to make up votes in other precincts where you need to persuade voters. Because of the higher Republican concentration in Precinct 4, those extra 89 votes from Precinct 3 might come in handy!

This kind of analysis should be done for every precinct in your district. Benchmarking in this way helps you measure success (or shortcomings) throughout the campaign and make corrections as you identify supporters through your digital and field efforts.

As you get closer to GOTV time, this method helps you focus on the priority precincts that are instrumental to your win.

Remember, the prior table shows the vote goal as 50% + 1, which is technically all you need to win in most races. However, your team may add in a cushion to ensure you hit your vote goal and win the race. For example, you might set a vote goal at a minimum of 53%, and rerun the numbers, which is shown in the next table. Giving yourself some extra cushion could create extra work, but it can also make your numbers and the chance of winning, if you hit those numbers, more secure.

Precinct	Dems	Rep	I&O	Total Registration	Likely Voters At 72% Est.	Likely Dem Vote At 72% Est.	Vote Goal 53% (team cushion)	Need to Persuade (Vote Goal – Likely Dem Vote)
1	350	350	50	750	540	252	286	34
2	400	350	0	750	540	288	286	-2
3	300	50	0	350	252	216	133	-83
4	400	600	40	1,040	748	288	396	108
Totals	1,450	1,350	90	2,890	2,080	1,044	1,101	57

As shown in the table above, adding a cushion increases the number of people you may need to persuade to hit your win number. In this example, you'll need to persuade 57 people. That might require additional field or phone work, which could increase your budget or your volunteer requirements. We'll cover that in more detail later in this guide, but now let's talk about your precinct priorities.

Precinct Priorities

Prioritizing your precincts is a great way to plan your outreach and track your progress. An easy way to think about it is a three-pronged approach:

Turn out heavily Democratic areas

By focusing on turning out heavily Democratic areas, you're catering to your base and hopefully making significant progress toward your win number.

Flip competitive precincts

Flipping competitive precincts allows you to continue to build toward your win number. While it may not make huge gains compared to turning out the base, winning these competitive precincts will help you move toward your win number.

Stop the bleeding in Republican areas

Ideally, your campaign would potentially flip Republican votes for you — pulling votes from your opponent and adding them to yours. However, there's also a benefit to your campaign if they simply don't vote for your opponent. If voters choose to not vote for your opponent, but they also don't vote for you, it's still one less vote you have to make up elsewhere.

Every district is different, which may determine how much time you spend on each of the approaches here. If you have a more Democratic district, you may want to spend more time focusing on turning out Democratic voters. If you have a more Republican district, you may want to spend more time trying to convince voters to either vote for you or not vote for your opponent.

Ideally, you would execute all three approaches thoroughly, but from a strategic perspective, you may decide to focus on overperforming in Democratic areas to make up for potential losses in Republican areas. Ultimately, it's up to you to decide how you want to execute your outreach strategy, however, thinking about your district and outreach through the three-pronged approach laid out here may help make it easier to understand where you should allocate time and resources.

Quick Go / No-Go Decision

After pulling numbers and evaluating your path to victory, take a second to think through your decision to commit to your campaign. Running a campaign isn't easy and we know that sometimes the numbers can provide more insight into what the future could hold for your campaign. Take a moment to evaluate how to move forward and commit to it.

The decision not to run is also valid. Living in a district with an 80%–20% Democrat to Republican registration advantage where you are the only Democrat who's running may be an easier campaign to win than living in a district with a 50%–50% split. The need to persuade more voters can take additional efforts to convince them you're the right person for the job. That can increase your budget, which will increase the amount of money you need to raise. If you're living in a district that is heavily partisan to the Republican side, and you do not think you'll have the time, resources, or support to do that kind of work, it might be best to help another Democrat who does have the resources or greater ability to win that district.

You're reading this guide, so you have an interest in running for office. If you decide to move forward after doing the research we recommend here...congratulations! You have become one of the many who have taken a positive step toward making your community a better place.

Now, it's time to start working on your campaign plan.

The Campaign Plan

What is a Campaign Plan?

The campaign plan is your roadmap to success! It's a comprehensive document of everything your campaign will do from the day you declare your candidacy to the day you get election results and beyond.

A campaign plan is a collection of strategies for necessary items like research, fundraising, outreach, communications, and anything else your campaign may need to do to win. A documented campaign plan helps keep your team focused on the important things you'll need to do at every step of your race. It brings clarity to your mission and helps you make decisions when resources are tight.

Campaign plans serve as a guiding document throughout the election season. By planning things out in advance, you will have greater flexibility to adjust plans if a pressing need arises. Without a plan in place, it can be difficult to move your campaign forward because you lack the goals and benchmarks necessary to measure progress. By establishing clear, measurable goals, you can gain a better understanding of where your campaign is strong and find areas where improvement is needed. For instance, if you are making great progress on your fundraising goals, but lagging on voter contact numbers, you can shift more time and resources to help bring voter contact efforts up to speed.

Let's look at all the components of a campaign plan:

- Research
- Communications
- Staff
- Field
- GOTV
- Finance

Typically speaking, it's best to include as much detail as possible in these plans because it eliminates the uncertainty that can crop up at any point in a political campaign. But don't let perfect be the enemy of the good. At some point, you need to move from planning to action. Remember, a campaign plan is a living document, and it can change as you progress through your campaign.

The good news is you've already built out part of your campaign plan by crunching some numbers and looking at historical election data.

Let's move to the next step: **research**.

Research

Now that you've decided to run, you want to find as much information as possible about you, your opponent, and your district. The research you perform now will pay dividends throughout your campaign, so conduct thorough research to make sure you don't miss anything that you could use during your campaign.

There are a few elements of research you'll want to complete to get the most holistic view of your election possible, including:

- You and Your Campaign
- Your Opponent(s)
- The District

Let's take a closer look at each topic and see how they fit into your campaign plan.

You and Your Campaign

As a candidate, try to do an honest assessment of your strengths and weaknesses. Lean into your strengths and seek help from others who can bolster your weaknesses, help you overcome them, or plan to defend them.

Encourage your team to research you. The odds are that if someone from your team can find something, your opponent will be able to find it too. Start with a simple web search and dig deeper into any leads you find. It's best to have a plan in place to address anything that may arise during the campaign even if you don't think it will.

While conducting that research, collect that information in one place, like a spreadsheet or separate document, and limit access to just a few people you trust who can help strategize how you might address the bad stuff (if any exists).

We've provided a brief outline of the information you may want to collect when researching yourself, but you can customize this for your own needs.

Overview

Born:

Education:

Occupation:

Elected:

Committee:

Community Service:

Views

A quick paragraph or two as an overview of your viewpoints and positions on the issues. While you may be a bit of a policy wonk, the key here is simplicity. For instance, voters may not need the granular details that you want to offer tax abatements for new businesses to bring jobs to the area. They might just want to hear simple details about your goal to bring high-wage jobs to your community. Start with a quick outline and then come back to fill it in later.

You want to be able to explain your stances on the issues in a few sentences to voters. Oftentimes, that "elevator pitch" may be all you can convey. For now, keep it short and simple and we'll return to it later. It's helpful to develop these stances early and document them so they can be used on your website, campaign literature, mailers, ads, etc. in the future.

Remember to check your social media pages for any views you may have espoused in previous years. If those views don't correspond with those you currently hold, you'll want to scrub that information from the web (if possible).

Legislation & Advocacy

If applicable, include any key pieces of legislation you have sponsored or officially passed that voters would find appealing. If this is the first time you're running for office, it's likely you've not authored legislation, but if you've been involved with legislative campaigns, ballot initiatives, or issue advocacy organizations, you can put that information here.

Did you save a public park from being demolished? Did you advocate for green initiatives to make your city more environmentally friendly? These advocacy initiatives can help reinforce your reputation as a community advocate seeking to represent constituents in an elected capacity.

Endorsement

Include any endorsements you have received from groups, unions, or important individuals. Often, civic organizations will issue endorsements that help convince voters to support a candidate. Endorsements can be very powerful motivators, especially for voters who don't have the time or desire to do a lot of research. Sometimes, voters just want to take the word of a trusted individual or organization with which they share values.

You might not have any endorsements yet, but you can search the web to find out whether any groups have endorsed candidates in previous elections. They might be open to endorsing you as well.

News and Quotes

Save both favorable and unfavorable articles about you. Again, these articles can be found with a simple web search. News and quotes, when favorable, can be used on your site with proper attribution and can work much like endorsements.

Your Opponent(s)

Researching your opponent has many benefits. It can help you find weaknesses in their campaign, and, in some cases, find an issue or problem that can even have the opponent knocked off the ballot before they get to run. For example, the office for which you are running might require residency within the district for at least two years before the date of the election. If you know your opponent has only lived in the district for a year or less, that might be enough to get them barred from being on the ballot and help create a path to victory for you and your campaign.

You'll want to research your opponent in the same way you've researched yourself, taking note of the same things like legislation, news, views espoused on social media, personal and criminal background, etc.

Understanding your opponent's point of view and knowing what your opponent will say on an issue helps you craft counter-messaging that can be employed during debates, on social media, in interviews, etc. If your opponent's views are in opposition to your own, you can craft a message that serves as a rallying call to action for supporters who share that opinion.

Develop a file on your opponent and keep that handy as a reference for your communication plan, to be used during outreach, or in debates with that person.

"Going negative" is the act of using information about your opponent in a negative way. Going negative is a choice you make and one that can have consequences. While some campaign managers will tell you that going negative can rally people to your side, it can also turn people off. Going negative too often can sometimes be considered "dirty politics" and can backfire and turn people against you too. When possible, try to keep things positive and focus on your accomplishments, your opinions, and your policies. There's nothing wrong with contrasting those things against the opinions and policies of your opponent, but doing it in a tactful manner helps ensure that you draw the comparison without turning people away from your campaign.

Make sure to check into your opponent's campaign finance reports. It's always a good idea to understand how much money your opponent has in the coffers and their ability to raise funds during a campaign. You have access to campaign finance filings by that candidate or their official committees. Local candidates often file with local election bureaus or county clerks' offices. State candidates often file with the Secretary of State. All federal candidates file with the Federal Election Commission. While you may need to request the files, they should be publicly available from all of the sources we mention here.

These reports can tell you what you might be up against from the beginning or help you understand how much money you might need to raise to be competitive. These reports can also serve as a rallying cry to your supporters who are motivated to make sure you have a fair chance during the race. There are typically two big numbers that you want to look for in campaign finance filings:

Current Cash on Hand: How much a candidate or campaign has available to them when the filing deadline passed

Total Fundraising: How much a candidate or campaign has raised over the time period specified in the report (commonly on a quarterly or annual time frame)

Both of these numbers are important because they can provide insight into where you stand against your opponent. Fundraising appeals about your campaign's financial status can be a powerful rallying cry in your fundraising strategy. We'll cover more about that in the finance and fundraising section of this guide.

List of Contributors: If there are companies or special interests of note on your opponent's contribution list, you may be able to use that in campaign messaging. Oftentimes, a key issue in the race can be highlighted by sharing information about who supports your opponent.

Also, think about how you may be able to frame the numbers included in both campaign finance reports.

- Did your opponent only have a few donors that were giving high-dollar donations to the campaign?
- What was their average donation amount compared to yours?
- Where did those donations come from (within or outside the district)?
- What PACs, businesses, corporations, etc. gave to your opponent's campaign?

Recognize that if you publicly call out the financial record of your opponent it is more likely they will call you out too. If you do go public, make sure what you say is accurate and verifiable. And if you go negative, be prepared for the blowback.

The District

In addition to researching yourself and your opponent, you want to gather more information about the district. Gather demographic data, economic data, community development plans, and anything else you can think of to get a better understanding of the district and its voters. Is it a rural, suburban, or urban district? Do people work in the district or commute to work? What future development plans are in the works that may impact your district? Simply put, you want to become an expert on the district you're running in and the residents within it.

By spending time researching yourself, your opponent, and your district, you'll be able to communicate clearly with voters about your campaign and the future plans you have for the district if you're elected into office. And, you'll be able to explain the impact that your opponent could have if they are elected as well. Highlighting these differences in a tactful way is a great place to start building your communication plan.

Communication Plan

What is a Communication Plan?

Your communication plan is vital to building your campaign and staying on message. By building a comprehensive communication plan, you can define your campaign and the issues that are important and proactively develop responses for any negative attacks that may come from your detractors.

The communication plan lays out your strategy for communicating your views to the public. It provides a roadmap for communication with external groups, voters, and the media.

It's okay if the plan changes slightly along the way. You should always be willing to test, measure, re-test, then change a message or the medium if the need arises. But never do so only on a hunch — make sure changes in your plan are backed up by analytics or data.

It's important to put a deliberate strategy behind every medium in which you plan to communicate.

Your campaign should use as many digital mediums as it can afford and as are relevant within your district. If you live in a community with a local radio station to which everyone listens, plan to be there. If there is a local newsletter that is widely circulated, plan to be in it. Maybe there's a well-positioned billboard above the only road into town. These are all considerations you'll have to make as you plan your communication strategy for your race.

Many campaigns will use one or more of the following communication methods:

- **Website**
- **Email**
- **Social Media**
- **Print Media**
  - Campaign literature, mailers, etc.
  - Earned media like newspapers, magazines, newsletters, news websites, etc.

- **Advertising**
  - Online, which includes social media, search and display ads, and over-the-top (OTT) ads to streaming services like YouTube, Netflix, etc.
  - Television
  - Print
  - Signage in stores, billboards, etc.

Which mediums you decide to use are going to be based on your time, budget, and availability of expert help. No one can do everything alone and rarely do campaigns have more money than they need.

You make the most of what you can with what you have, and constantly test, measure, and review analytics to make sure the money you are spending is being spent wisely. If not, don't be afraid to change methods or mediums or to buck conventional wisdom.

Spending $1,000 on Facebook ads because your friend thinks it's a good place to be is not a social media advertising plan. Spending $1,000 on Facebook because it gets you seen by 2,500 potential voters, 500 of whom decide to attend an event to hear you speak is a much better plan, but still, it should be tested against other methods and their associated returns on investment.

If you're not hitting your vote goals or precinct priority goals, you need to quickly assess why you are missing the mark and be ready to make the changes necessary to affect better outcomes. Often, these assessments will require changes to your message or how it is being delivered. It might also require investing more money to make the necessary changes. Through these communications, you'll likely be talking to voters about what issues are important to them, explaining what issues are important to you, and why they should vote for you. But what issues should you focus on?

Defining Your Message

Top 3 Issues

Your campaign should focus on three or four issues, no more.
These are the issues most important to you and most important to your district.

Try to boil it down to just one or two words. A short sentence at the most, like:

- Tuition-free college
- Protecting Social Security
- Easing traffic on Route 1
- Better-paying jobs

After you've chosen your top issues, write why you believe they are an important issue in your district and what you believe should be done to solve it.

For each of your top issues, aim to write 500 words or more. Supporting documentation or graphics is a good idea to have here.

You might also have a friend or coworker who is an expert on these issues who can help you identify messaging or specific strategies to resolve them. Having a well-respected voice on a specific issue you've adopted as your own can help lend credibility to your campaign.

These top issues will be the first on your website and shared often on social media and in your campaign collateral.

Next 3 Issues

While you won't be focusing your campaign on these issues, make sure to lay out your positions on a few issues not included in your top issues list. These are your secondary issues. They're important, and probably mean something to many residents in your district, but they are probably not the issues you would plan to work on immediately if elected.

Follow the same guidelines for crafting your top issues, but you can scale back on the number of words or depth of explanation if time runs short in the planning stages.

Keep in mind that as you progress through your campaign the top issues might change. Polling might reveal an issue you didn't think of previously, or residents might change your mind on an issue that should be of higher priority than those on your top issues list.

Your Opponent's Message

Take time to review and analyze your opponent's message as well. Where do they stand on the issues? Where are the weak points in their arguments? How can you highlight the clear distinctions between campaigns on issues that are important to the voters?

By researching your opponent and where they stand on the issues, you can better understand how your campaigns compare to one another and find ways to gain the upper hand. Through your campaign communications, you can highlight those distinctions and explain why you're the best candidate in the race.

Digital Communication

Website

Before your official campaign launch, build your campaign website so you can direct people to take action or make donations before, during, and after your launch. Your website is the place where the public can interact and engage with the campaign through pages, forms, email sign-ups, videos, and more. It is typically managed and maintained by the digital team, and back-end admin access is controlled by the digital director.

The website structure we recommend is as follows:

1 Home **2** About **3** Issues **4** Take Action **5** Donate
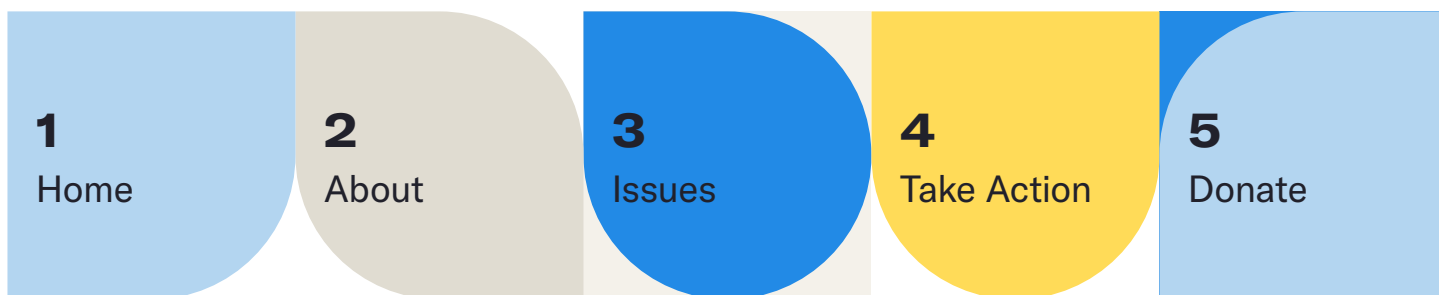
These five pages hold most of the critical information for your campaign. The more concise you can be, the better these pages will perform for you.

Your home page will hold the bulk of the design, including an image of you and your campaign logo. It should be fresh and inviting and hold all the basic information one would need to understand who you are and why they should vote for you. It should include links to the other pages as well as an email sign-up form.

The "About" page will contain your biography and a few images. Think about how you want to be portrayed — are you an activist, a small-business owner, or an educator? Choose images that reflect how you want to be portrayed. Typically, it's a great practice to have a headshot on your website that can be used for all media. Your "About" page should also include a call to action or links to your "Take Action" page.

Your "Issues" page will list your positions on the top and secondary issues in that order. You can also create individual pages for each issue and then link to them from the main issues page which would include just a short paragraph on each issue. You can provide a link at the bottom of the "Issues" page to contact the campaign if people want more information.

Your "Take Action" page is how people can engage with the campaign. This will include a sign-up form, volunteer opportunities, links to petitions, etc. It's a great place to plug in your Mobilize link as well.

Your "Donate" page will be a place where people can make online donations. You can also link directly to your donation portal instead of building a page on your website to process donations. You'll need a payment processor to take credit card donations online, and NGP VAN has got you covered! With our streamlined application process, you'll be approved to start collecting payments and creating online forms within minutes of logging into NGP for the first time. With FastAction, donors can store their information online and make one-click donations in the future.

As you progress through your campaign, you may add additional pages to your website. Place those planned pages on the editorial calendar first, so the team knows when they go live, when to share them, and when changes are being made.

Make sure to keep your website updated as well. It's typically best practice to schedule times to review your website regularly to update it with new information and review existing content.

Need a website?

We can build one for you!

Learn More

Email

Email is one of the most effective means of communication with your supporters and donors. It can be used to inform people about issues, engage with people online, raise money, or push people to events.

There are five main types of emails:

1 Informational	2 Social Share	3 Petition	4 Volunteer	5 Fundraising

Informational emails convey your point of view or give the reader information they may not have. There is rarely a call to action in these emails, but it's best practice to always have a donation link or button on every email.

A social share email asks your reader to share the information or media you are giving them. It requires them to agree with or like your message enough to go on their social media channels and share it. It's the type of call to action that requires the least investment of either time or money.

A petition email is one where you ask your reader to support your point of view and to do so by signing a petition. This call to action requires the reader to agree enough that they are moved to share some personal information.

Volunteer emails are similar to petition emails in that they ask the reader to take action, either in person or online. Either way, it requires an investment of time on the part of the reader, and that person will do so only when they believe in the cause or candidate. Sending a Mobilize link or another sign-up form is an easy way to gather volunteer information quickly.

Fundraising emails are those that ask for money. This is usually the toughest ask. These emails are typically sent after the candidate has built a digital relationship with the reader through one or more of the other email types. However, these emails are one of the best ways to raise money for your campaign.

Emails should always be placed on the editorial calendar and only sent after approval from the candidate or managing editors of content.

Need an email platform?

Learn More About **Targeted Email**

Social Media

Social media is a powerful tool to build your campaign's presence and ask supporters to act. These accounts are maintained by the digital director. Posting on social media is done following the editorial calendar.

Do not use your personal social media profiles as your campaign accounts. Also, as a best practice, make sure to review your personal social media accounts for any questionable content and check your security settings to make sure you're comfortable with who can see your posts.

Feel free to share your campaign's posts on your personal page, but it's best to have separate campaign accounts across all social media platforms. Try to name your social channels with usernames and profiles that are consistent with your website and email address.

Social media is best when it creates dialogue and engagement with users. This means answering questions, responding to messages, and interacting with voters and supporters in real time. Only use the social networks that you can adequately spend time on. If you don't have the time to put into developing conversations and relationships over social media, don't bother creating the accounts. Dormant accounts with old posts look bad and reflect poorly on the candidate and the campaign.

Algorithms decide what is shown to you on social media based on past behavior, the likelihood of interacting with content, etc. As you begin to build your social media presence for your campaign, you want to make sure you're posting engaging content consistently.

Here are some content ideas for your campaign:

Election-related content

Share election-related news. How can people vote for you? When can people vote early? Where can people find out where their polling location is?

Fundraising posts

Ask for donations. When you're approaching fundraising deadlines, make sure to promote them with a donation link on your social media accounts.

Campaign highlights

Share updates from the campaign. Have 100 people donated to your campaign? Have you knocked 5,000 doors? Think of the great goals you can share to show momentum and progress to energize your supporters and encourage them to take action with you!

Introductory posts

Explain who you are and why you are running. You should be able to reference your campaign plan for this copy.

On the issues

Talk about where you stand on the issues.

Social media success does not equate to electoral success. By design, social media shows your content to people who are likely to engage with it based on their past behavior. This means that your content will be shown to people who were already likely to support your campaign. If you're a social media superstar, that's great, but social media is a supplementary tool to help you win. Simply put, you have to spend time talking to and advertising to voters in your district to win.

Advertising

It helps to get the word out about your campaign, and buying time online or on TV can help get the word out quickly and efficiently. We recommend starting with digital ads, as it will often be the least expensive way to test your branding and messaging. Then progress to other more expensive methods as time and budget allow.

Remember, with advertising, make sure to measure everything, test, re-measure, evaluate analytics (if they're available), and be quick to make changes when you discover something needs to change.

Print Media

Mailers, palm cards, door hangers, and more are all campaign collateral that can be sent or given to voters throughout the district. Use your consistent messaging and branding to develop these print materials and make them available as your budget allows. Make sure to send them to a union printer and have them put the union bug on your campaign materials.

Not everyone looks at emails or social media, so having good print media can work well with certain segments of the voter base. While you're out canvassing, it's best practice to leave a piece of campaign literature at every door (just don't put it in their mailbox!), so make sure to order enough literature in advance!

Earned Media

Earned media is free advertising for your campaign. By finding contacts at local news outlets, campaigns can send press releases and media advisories that may result in stories being published about your campaign. Not every press release you send will result in a story, but a few of them may be covered by your local press. Most national and local outlets have an editor who covers local politics. Try to find their contact information on their website, or search for older articles about your elected officials and see who wrote them. Put those people first on your list for outreach.

In addition to the press, you should try to partner with local organizations to ask if they can include your information in their communications. Whether they're a local advocacy group or neighborhood association, contact them to touch base about what issues are important to them and ask if there are any ways that they could inform their members about your candidacy. Groups like the League of Women Voters often prepare election guides and automatically reach out to candidates who make the official ballot to include their biography in an official communication to their group. Local chambers of commerce might also send something to their members about candidates who profess to be business friendly. Real estate associations often support candidates who are former agents or involved in housing or development. Those are just a few examples, but if your research turns up popular businesses or industries in your area, make sure you explore any intersections your campaign might have with those industries, and don't be afraid to find opportunities for positive press with them.

Editorial Calendar

Once you know all the mediums through which you will communicate, you'll want to put together an editorial calendar for the campaign. The editorial calendar is typically maintained by the communications director and the digital team in a spreadsheet and lists all the communication methods you'll use, along with a schedule that details the content to share and who is responsible for publishing it. Having this information listed in one place makes it easier for your team to understand what they need to share and when they need to share it. It also keeps important public information ready should the press need information from your team to share with its readers or viewers.
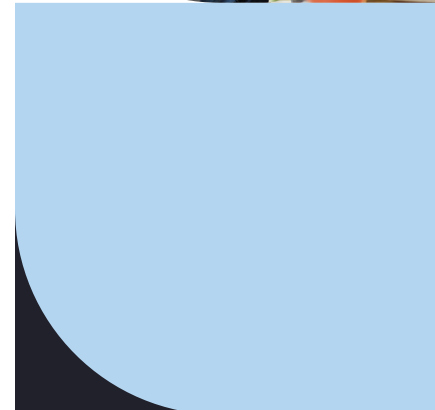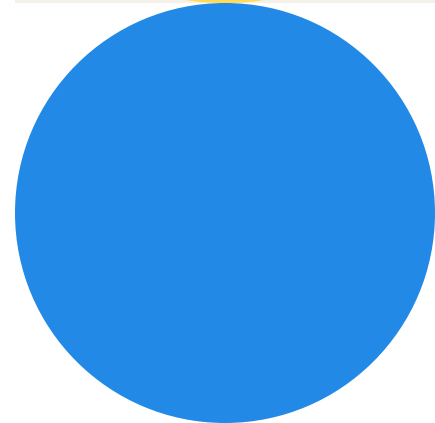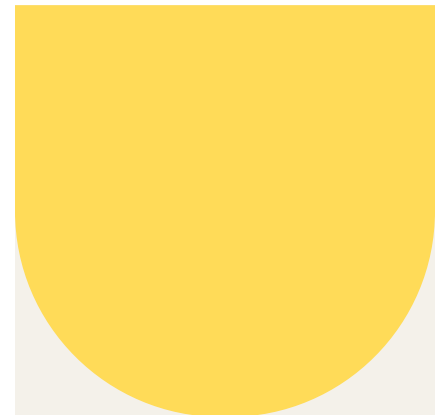
Staffing Plan

Now that you've got a better idea about what your message will be, you need some help getting that message out to the voters in your district. It's time to start thinking about the people who will help you get your campaign off the ground. That's where a staffing plan comes into action!

What is a Staffing Plan?

A staffing plan helps campaigns understand what positions they need to fill, what their responsibilities will be, and how the reporting structure of campaigns will be organized. Not every member of a staffing plan will necessarily be a paid employee. Your campaign might not have the funds to hire anyone at the start. But it does help identify the people in your life who might fill roles that most campaigns need. If you're short on funds, some of these roles might be filled by volunteers or friends and family.

Staff Roles and Responsibilities

Campaign staff roles can be filled by both paid operatives or volunteers depending on the scope and scale of the campaign organization. Here are the key roles you might consider filling for your campaign.
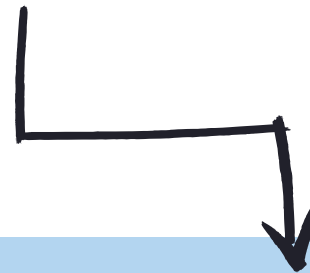
Campaign Manager

A campaign manager oversees all aspects of campaign operations. They execute the campaign plan and sometimes develop it. They are in charge of reporting back to the candidate and campaign committees (if they exist) about goals, barriers, and more. Their main job is to always keep the campaign on track. The campaign manager will handle finding key staff and then delegating tasks and authority to that staff, and following up to make sure tasks are completed in a timely manner.

After delegating tasks out, the campaign manager needs to constantly check to make sure each aspect of the campaign is running effectively (and quickly fixing the situation if it isn't). Campaign managers are helpful at all levels of campaigns as they can take some of the day-to-day operations out of the hands of the candidate so they can focus on other priorities.

Scheduler

Schedulers manage the candidate's campaign schedule. While they may only be planning for campaign events, it's typically best practice to have access to a candidate's personal and work calendars as well. Having access to all calendars will help scheduling run more efficiently and prevent scheduling mishaps. The scheduler will coordinate with other members of the growing team from the campaign manager and field director to the finance director, volunteer director, and event planner.

Digital Director

Digital directors lead all digital efforts and communications, including email, social media, digital advertising, and more. They are often responsible for developing a digital communications plan that outlines all the communications that will be sent or posted on behalf of the campaign. This plan will serve as an outline for you to build on, so you can begin content development while also allowing flexibility to address new needs that may arise on the campaign trail.

Treasurer/Compliance Officer

Treasurers and compliance officers are legally responsible for the campaign filings and disclosure reports. These roles are integral in making sure that accounts are reconciled and that all your donations and expenditures are accounted for in every filing. Treasurers and compliance officers typically work closely with the finance director, call time manager, event planner, and campaign manager.

Donor Researcher

Donor researchers help you find additional donors to your campaign. For every list collected and aggregated, there will be various forms of information that need to be plugged in so the campaign and candidate can maximize the potential of each contact. This work requires database-building skills and various forms of online research abilities. Donor researchers work closely with the finance director and treasurer.

Finance Director

Finance directors help raise money for your campaign. They make sure the campaign has the financial resources to achieve its goals. Typically, a finance director will develop a fundraising plan that includes measurable goals to ensure the campaign stays on track. They will help develop fundraising appeals and strategies and work closely with other campaign staff to execute the fundraising plan. From compiling fundraising lists to planning and executing fundraising events, the finance director has a major role in the campaign as the campaign cannot function without substantial financial support.

Call Time Manager

Call time managers prepare lists or call sheets of prospects and donors for candidates to call through to raise money. These managers prepare lists with all the necessary information to make an informed ask (including a phone number, past giving history, etc.), enter call results, and follow up with donors once a pledge is made.

Field Director

Field directors map out the field plan and take the lead in executing the plan. Working in sync with the volunteer coordinator, the field director will put the ground forces out (optimally daily) to identify votes or get the "message" out door-to-door. The field director will also coordinate ward and precinct leaders (if present) throughout the district. This coordination will help facilitate an effective door-to-door effort and prepare for an efficient Election Day strategy.

Volunteer Coordinator

Volunteer coordinators identify each person that volunteers to help on your campaign and match them up with the right tasks. The volunteer coordinator must be personable and able to delegate volunteer duties quickly and efficiently. The volunteer coordinator also needs to maintain a well-documented database, so we know who has volunteered to help and has been kept up to date with campaign activities. Volunteer coordinators work closely with the field director, event planner, and campaign manager to make sure there is enough volunteer support for various campaign efforts.

Event Planner

Event planners develop, coordinate, and organize events of all shapes and sizes. Whether they're organizing a high-dollar fundraiser, a small house party, or a large fundraising dinner, the event planner works with the necessary staff and volunteers to effectively execute campaign events to achieve campaign goals. They coordinate with host committees and others to ensure all the details of a campaign event are ironed out so that when the event starts, everything runs according to plan.

What Roles Do You Need to Fill?

We realize that after seeing that list you may be thinking, "Whoa, I don't know that many people who could help me out." That's understandable, and while it's great to have more help than you need, most first-time candidates struggle to find people to fill even a few roles. Having a campaign manager, treasurer, and volunteer coordinator will help guide a lot of what needs to happen on a campaign. If you have the funds to pay a professional, that might be your best route. Check with other local candidates and elected officials to see who they recommend. Look at finance reports to get the names of consultants to call. Even if they're busy and can't help you now, they may refer you to others in the industry who can help your campaign.

Go back to your research and evaluate your strengths and weaknesses and try to bring people in to cover the areas where you are weak. Be honest with yourself here. As a candidate, you can't do everything, even if you are truly good at everything. Chances are there's someone out there who can do certain things cheaper, faster, and more efficiently than you can. Sure, you may have experience designing marketing materials. But maybe there's a local designer who can do it for you while you're speaking to people at community events. The $1,000 you spend on a designer might be the most efficient use of that money if it allows you to speak to 100 voters or plan a fundraiser to raise $10,000. Finding someone to handle time-consuming tasks or add support to your campaign will pay off in the long run.
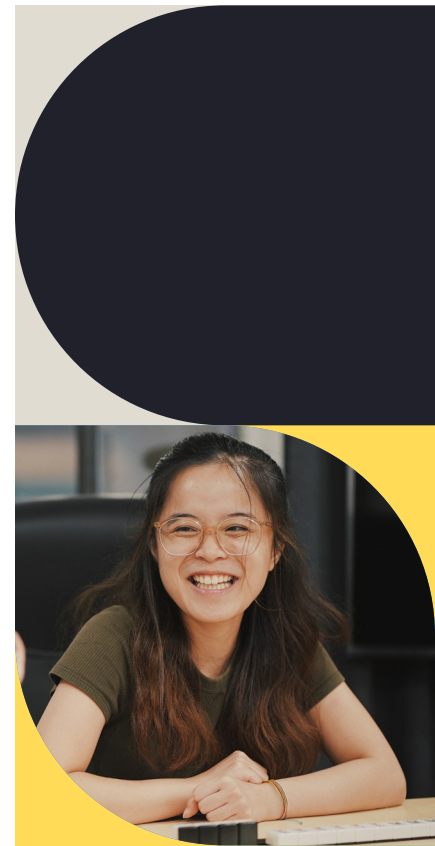
Volunteers in Place of Staff

Not every position needs to be a paid staff member. Many campaigns have no paid staff at all, but they have a dedicated group of volunteers. You may know people who are willing to give their time to your campaign. For instance, maybe a family member or friend is an accountant and would be willing to serve as your campaign treasurer. Maybe your friend is great at connecting with people and delegating responsibilities — they could be a great volunteer coordinator! Finding a few volunteers to help fill some of these roles on your campaign will save you money and time moving forward.

Remember to measure results with staff too. If a volunteer isn't hitting their goals, it might be time to put someone else in their place. Don't be afraid to tell family and friends and unpaid volunteers that you're thankful for their work, but your campaign needs to change direction. The goal is to make sure everyone is aware of campaign goals and working toward achieving them. Being clear about your goals upfront takes away any ambiguity about what you are trying to achieve.

Field Plan

You've got a message and the staff to get it out there throughout the district. At some point, every campaign needs to start talking directly with voters. A good field plan will supplement all the work you do digitally and help identify the actual voters who support your candidacy.

What is a Field Plan?

A field plan is your strategy for moving the campaign into the field and having conversations directly with voters, either over the phone, at their homes, or in a public setting. Your field plan typically consists of a few voter outreach methods, including, but not limited to, canvassing, phone banking, texting, and events. As you begin to build your field plan, identify what outreach methods you want to employ and think about how you want to strategically deploy them for maximum effectiveness and efficiency.

It often helps to lay out your field plan in a calendar so everyone knows where they should be and when they should be there. You'll want to prioritize your field plan based on the priority precinct list and three-pronged strategy we discussed earlier in the guide. Consider who you need to turn out to win and determine the best way to start talking to those voters.

Revisit Your Win Number

Your field plan revolves around the win number you calculated before starting your campaign. This number will determine how many people you need to identify, and since that outreach will require a lot of volunteer support, building your field plan will also help determine how much more support you will need to hit your field goals.

Where to Find the Voters You Need to Win

The Voter File

The simple truth of campaign cycles is that there is a limited amount of time and resources available to talk to voters to convince them to support your campaign. With this goal in mind, campaigns should target their audiences to run the most efficient and effective campaigns possible. This is where the voter file comes into play.

The voter file is your main source of data to help target voters that you need to win.

VAN and SmartVAN are two of NGP VAN's software solutions that provide a complete voter file with contact information of every voter in your district. They also provide a plethora of voting scores and other targeting information for your campaign to segment audiences and deliver relevant messaging to them. For instance, you might want to create a list of people who are likely to support Democrats or those who are likely to get out to vote in the upcoming election. Those scores, along with many others, are available in the voter file. You can also quickly target voters geographically by precinct, distance from an early voting location, and much more. Sometimes you might want to send disparate messages based on a voter's past voting behavior. The voter file can help you do that too. It's an incredibly powerful tool that will quite literally change the way your campaign runs once you gain access to it.

Based on district boundaries, past voting history, party identification, the likelihood of supporting Democratic candidates, and much more, you can pull a list of voters together that should at least equal the win number that you calculated earlier.

Ask yourself, "Which voters are most likely to support me and where do they live?" Those are the voters you want to speak with first to confirm their support. Hopefully, there are enough of those voters alone to reach your win number. If not, start contacting voters who may need to be convinced to support you. Again, this is your "persuasion audience" because you'll need to persuade them to vote for you.

In most cases, it doesn't make sense to engage with voters you know to be antagonistic. Save them for last, or for no contact at all. Don't expend resources or waste your time and money trying to convince people to vote for you when they go out of their way to publicly denounce you. You might feel like there is something you can say to "win them over." Or if you can just "get them to see the facts" they'll vote for you. More often than not, you're just chasing a dream. Put your time and energy into the people most likely to vote for you first and save everything else for later.
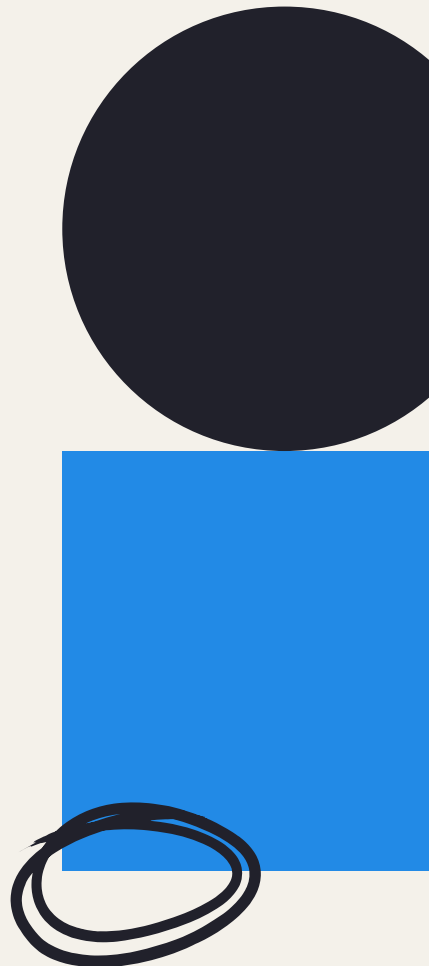
How to Use VAN

VAN is the gold standard of political campaign technology. It's the most valuable tool on every campaign because it helps you target the voters you need to win. VAN is the leading voter engagement tool used by more Democratic and progressive campaigns and organizations than any other political outreach tool.
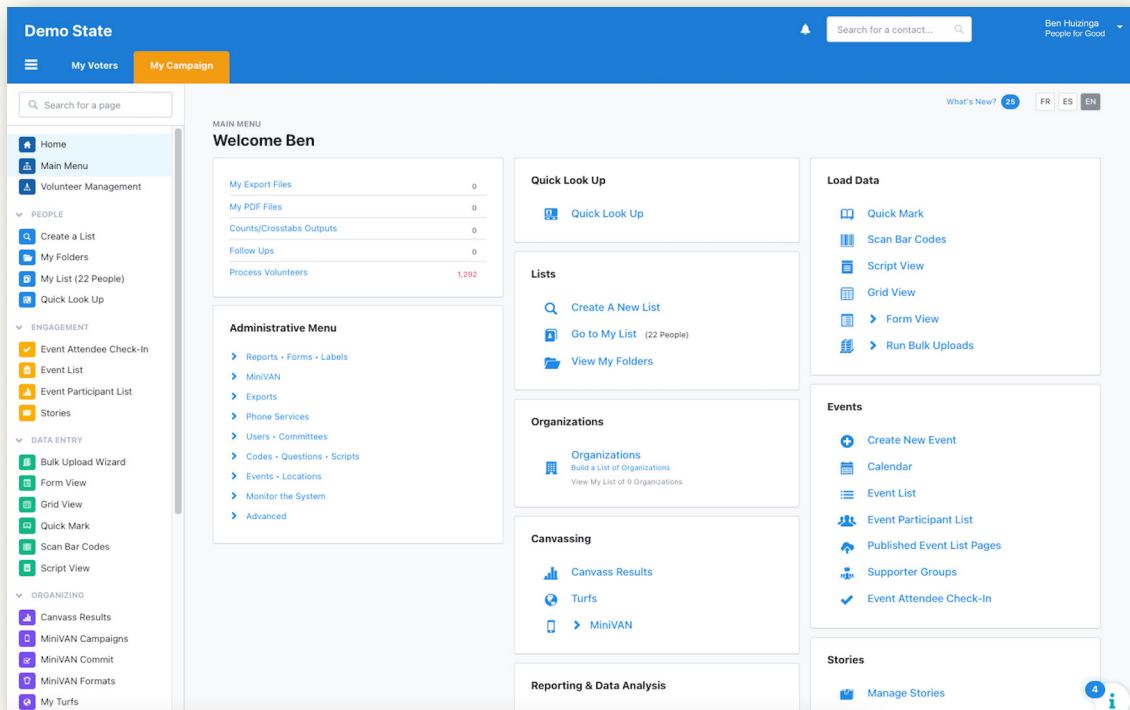
We created a separate guide just for learning how to use the VANual in your campaign. In the VANual, you'll learn best practices for contacting the voters you need to reach to win your campaign, including:

- Creating lists of voters in your district
- How to reach voters via phone banking
- Cutting turf for reaching voters at their homes

- Mobile Canvassing with the MiniVAN app
- Tracking voter responses to survey questions
- And more!

The Official
VANual
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To gain access to VAN, reach out to your state party. They'll give you access or refer you to your local party for access. Once you gain access to VAN, you can build out your voter universe and decide what the best voter contact strategies are for your campaign.

Download the VANual

Voter Contact Strategies

There are several ways to contact targeted groups of voters, and we've got the tools to contact many of them. From our mobile canvassing app, MiniVAN, to our Virtual Phone Banking software available in VAN and SmartVAN, we've got built-in tools that are free with your software. As a general suggestion, it's best to employ all these voter contact strategies if possible, but with limited resources, you need to employ the best strategies for your campaign.

All these voter contact strategies will be focused primarily on the targeted universe you will create in VAN. After crafting that universe, you can engage in multichannel outreach to meet and talk to voters where they are. Your main goals for employing these strategies are to find supporters and then get them out to vote as soon as possible.

Doors

Canvassing, or speaking to voters at their homes, has been proven to be one of the most effective forms of voter contact. It can take more time than phone banking or sending a text message, but speaking to someone directly helps make a lasting impression that they may remember when it comes time to vote. Voters often tell candidates they received their vote simply because the candidate took the time to show up at their door and talk to them. By speaking directly with voters at their homes, you can quickly establish rapport and address issues that directly impact them, hopefully leaving a positive impression that they will remember when they vote..

Pros	Cons
• Has a higher contact rate compared to phone banking	• Requires a lot of time to contact a large group of voters
• Allows your campaign to speak directly with voters	• May need paid canvassers to reach your voter outreach goals
• Gets the campaign out into the community	
• Allows you to get direct feedback from voters on what's important to them	

Campaigns will build up their volunteer capacity to scale operations and launch canvasses across the district. Typically, campaigns will choose an area to canvass based on their precinct priority list and cut turfs (a selected area of targeted voter households). They will then choose a time, date, and location to launch their canvass (like a local coffee shop or a volunteer's home), recruit volunteers to attend the canvass, and instruct them to download the MiniVAN app before they arrive. Once they arrive, either the candidate or a representative from the campaign will thank volunteers for coming out to knock doors, help everyone download a list, give them a quick tutorial on how to use MiniVAN, hand out campaign literature, and finally launch the canvass!

In 2022, over **90%** of the 169+ million doors knocked were logged through MiniVAN, saving campaigns hours of data entry and leading to significant impact on campaigns across the country.

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Some campaigns also use [Distributed Contacts Campaigns](#), a distributed organizing strategy that allows multiple canvassers to use the same list number to hit a determined number of doors in the geographic area closest to them. It may be easier for some campaigns and volunteers to employ this canvassing strategy as there is less coordination needed, but volunteers may still need to learn about MiniVAN and collect campaign literature to distribute when they're out knocking doors.

Whether you choose to cut turfs or use Distributed Contacts Campaigns, you will generate list numbers that you can then give to volunteers to plug into MiniVAN.

After downloading the list, canvassers will be able to see a list of targeted voters and households, pull up a script from your campaign to guide their conversation at the door, and record answers to questions and other relevant information.
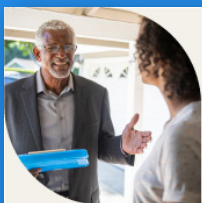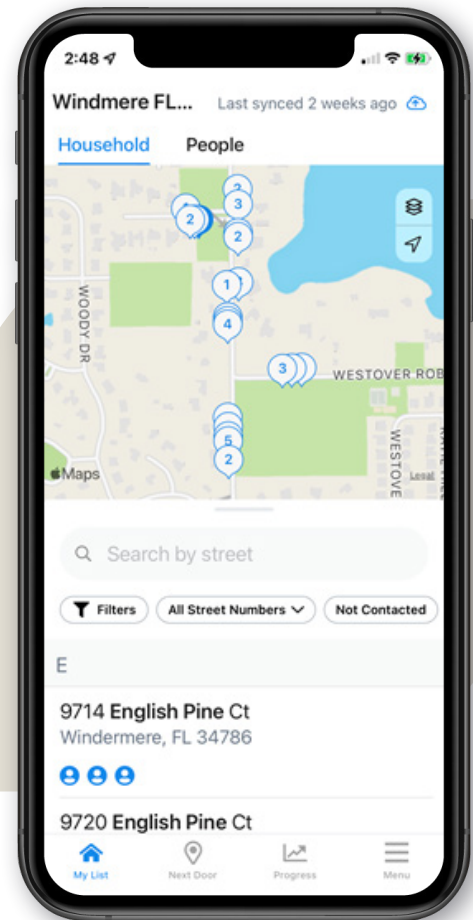
MiniVAN

MiniVAN, our mobile canvassing application, allows staff and volunteers to easily record interactions with voters at the doors and automatically syncs that information back to VAN for your campaign to use in future interactions. We also created the MiniVANual to help you learn how to use the app with step-by-step instructions along with some of the best MiniVAN tips and tricks!

We cover everything you need to get started, including:

- Creating a MiniVAN canvass
- Distributed Contacts Campaigns
- MiniVAN Manager
- Optimized Routing
- And more!

For more information on MiniVAN, [download the MiniVANual](#).

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Learn more about the most impactful canvassing software in the progressive political space.

Download the MiniVANual

Phones

Phone banking is another great way to contact voters. Instead of knocking doors to talk to voters, you're simply calling their phones. While it's a little faster than canvassing, your contact rate is typically lower.

Pros

- Allows your campaign to speak directly with voters
- Offers a chance to get direct feedback from voters on what's important to them
- Can connect with voters faster than meeting them in person
- Can be less expensive than in-person contact methods, especially if volunteers are calling voters

Cons

- Has a lower contact rate compared to door-to-door canvassing
- May need paid callers to expand operations if volunteer support is not sufficient

VAN has built-in tools that allow you to set up Virtual Phone Banks quickly and easily for volunteers to make calls from wherever they are. Presidential campaigns make efficient use of volunteers for phone banking, employing the use of volunteers to make hundreds of millions of phone calls. Regardless of the size of your campaign, you can always teach volunteers to make calls to effectively contact voters in your area. Check the VANual and MiniVANual for more information.

VAN/Open Virtual Phone Bank

Within VAN, Open Virtual Phone Bank (OpenVPB) is an easy-to-use software that allows anyone to make calls from wherever they are. After creating a list of voters in VAN and writing a script for volunteers to use, you can quickly set up an OpenVPB and send the link to your volunteers. They simply create an ActionID, log in to OpenVPB, and start making calls.

As volunteers log information, it automatically syncs back to VAN. After calls are made, you can review the data collected and factor it into your vote goals to see where you need to allocate resources to meet your goals.

While some campaigns choose to set days, times, and locations with phones or computers provided for phone banking, many other campaigns choose to employ a distributed organizing strategy where volunteers make calls from home through an OpenVPB link sent from the campaign. After using their computer to log in to OpenVPB, volunteers would also use their phone, an online dialer, or VPB Connect.

VPB Connect

VPB Connect is a great add-on that offers click-to-dial functionality to dial contacts quickly and seamlessly, including cell phones, from within any browser or device. VPB Connect improves the user experience and saves time for volunteers and lets you reach even more supporters in less time. Through a central caller ID from an area code within your district, volunteers and staff can make calls from any device, allowing local and out-of-district volunteers to make calls from a local phone number.

Learn More About **VPB Connect**

Mobile Messaging

Text messaging is another great way to cut through the noise to engage your supporters, activists, and volunteers. With high read rates, text messages are a great way to encourage supporters to act.

Like using VAN for phone banking, NGP users can use mobile messaging from anywhere they can access the internet. Typically, the campaign will set everything up and then send a brief tutorial to volunteers who may be interested in helping.

Pros

- Has a high read rate (typically higher than 90%)
- Is relatively inexpensive compared to other contact methods
- Provides another channel to connect with active supporters to encourage more action
- Can be used when time is of the essence, like for urgent messages or pop-up events

Cons

- Requires you to have cell phone numbers
- Has a low response rate (typically around 10% or less)

Learn More About **Mobile Messaging**

Mail

Mail is another effective method of sharing your message with voters. By exporting lists from VAN, you can send targeted mail to your voter universe. Mail is typically best used in a series — sending multiple pieces of mail over the election cycle can help reintroduce you and your stances on the issues to voters multiple times. Make sure to use a union printer for your mailers and make sure the bug is on your mailers!

Pros	Cons
• Allows for specific household targeting • Ensures deliverability to a voter in your district	• Can be expensive depending on how many mailings you send • Lacks analytics that other advertising methods offer

Digital

Digital is an inexpensive way to broadcast your message to a wide audience of voters. Typically, there are targeting parameters that can be used to make sure you're still providing the best return on your investment.

Digital advertising allows you to see the most in-depth analytics of any advertising method available. Keep an eye on the impressions (the number of times your content is shown), reach (the number of people your content is shown to), and frequency (the number of times your content is shown to the same person). These metrics can help you gauge if you should scale up your digital spending or work to diversify your spending on different ad sets.

Pros	Cons
• Allows for very specific targeting • Reaches voters through a variety of channels (Facebook, Instagram, YouTube, etc.) • Offers in-depth analytics for fine-tuning advertising	• Only reaches those who are online • Can be scrolled past or skipped without engaging

TV/Cable

TV/Cable advertising is a big investment for campaigns, but if you have the funds to get on TV, it's a great way to broadcast your message to a large audience. Unfortunately, unless your district has its own media market, the ads you buy may be shown outside of your district. Don't forget that you also need to pay to produce ads in addition to the recurring cost of paying for the ad space usually on a weekly or monthly basis.

Pros	Cons
• Advertises to a large audience • May reach voters you can't or haven't reached through other channels • Allows you to advertise on specific channels in specific time slots	• Is expensive compared to other advertising methods • May be shown to people outside your district or those who cannot vote for you • Only reaches people who watch the channels on which you advertise, including those likely to vote for your opponent

Events

Events can be a good way to talk to voters, but they tend to take up time and resources that the campaign cannot spare. Many times, people who come to attend these events have already made up their minds as to who they're voting for. However, they can be a good gathering place to encourage people to take action. If you're planning an event, make sure to work on recruitment strategies to encourage people to come to the event to make sure it's worthwhile. Many of our platforms can help recruit people for events. For instance, Mobilize, our volunteer recruitment and event management platform, can help boost event sign-ups by up to 40% through built-in automations and its network of 5.5 million supporters.

Learn More About Mobilize

GOTV

All your campaign work leads up to GOTV, which stands for "get out the vote." GOTV is when you're focused on turning out every person who can vote to vote for you! During GOTV, you work through your universe to turn out your supporters, persuade any voters who were on the fence about supporting you, and try to convert those last voters who maybe haven't been convinced yet. Focus on getting your supporters out to vote early if possible, and then work on those outstanding voters who may need more convincing.

GOTV typically runs a few weeks before the election through Election Day. However, whenever people can start voting (whether that's voting early in-person, by absentee ballot, or by mail), you want to start getting out the vote. One of the best ways you can bank early votes for your campaign is by implementing a ballot chase program.

Ballot Chase Program

While different states have different rules and laws about mail-in voting, once a supporter has requested a mail-in ballot, you want to make sure they return it as soon as possible. A successful ballot chase program means following up with your voters throughout the voting process to make sure they successfully return their ballot.

Your program is going to look different depending on your state's vote-by-mail and early voting laws and what data is provided by your state's Secretary of State, but generally, a ballot chase is following up with voters who requested or received a ballot.

Not only does this bank votes early for your campaign, but you can then remove voters who have already voted from your contact lists moving forward. This makes voter outreach more efficient as you move forward with your voter contact strategies.

For more information on how to bank early votes for your campaign, check out our blog!

Final Review of Win Number

As you make your way through GOTV, make sure you review your win number one last time based on the expected turnout. Consider things like early vote and absentee vote totals, expected turnout or enthusiasm surrounding the election, and other factors that may impact how many votes you need to win on Election Day.

Organizing Strategies

Organizing is how you plan to execute the campaign plan that you've put together. Depending on the type of campaign you're running, the number of volunteers you may have on your campaign, and your leadership style, you may want to take some time to consider how you want to run your campaign through a traditional or distributed organizing strategy.

Traditional Organizing vs. Distributed Organizing

Traditional organizing is focused on a top-down approach to organizing. All organizing is typically routed through a central office with paid staff in field offices around the communities in which you are organizing. The central office often provides direction for every campaign action. Paid organizers in field offices are then charged with finding and mobilizing more volunteers to help achieve the campaign's goals.

While traditional organizing is still more common, it is more expensive to maintain than a distributed organizing campaign. Paying for staff, field offices, technology, and marketing costs can add up quickly. While some campaigns may be able to afford these expenses, many others cannot. Another challenge with top-down organizing is that the central office is often slow to respond to changes happening on the ground because information flows down, but rarely up. Information coming from field organizers talking to voters is also slow to make its way back to the central office, which means beneficial changes are made late in the game, or not at all. In comparison, distributed organizing can be a low-cost way to both empower volunteers and scale up organizing efforts quickly.

Distributed organizing is focused on a collaborative, bottom-up approach. By trusting and empowering volunteers to do many campaign tasks typically given to paid staff, distributed organizing focuses grassroots energy and momentum into direct action and allows volunteers to play larger roles on campaigns. Aside from some technology platforms and staff dedicated to training and empowering volunteers, there's less cost associated with this type of organizing. Technology platforms and other guidelines are typically provided by a central office. However, the execution and personalization of actions are left largely up to the local chapters. The best distributed organizing software, like Mobilize and VAN, make it easy for distributed organizers to create actions their volunteers and super volunteers can quickly take and share with hundreds (or hundreds of thousands) of local supporters in their networks.

You can learn more about distributed organizing in our Distributed Organizing Guide.

ngpvan | Mobilize

Distributed Organizing Guide

Download Now

What is the Best Strategy for Your Campaign?

Ultimately, there are opportunities and obstacles with both organizing strategies. It's highly dependent on what type of campaign you want to run and what you think makes the most sense for your campaign. If you think you want a more top-down approach that focuses on your direction or direction from a campaign manager, a traditional approach is probably a better fit for your campaign. If you're okay with delegating more responsibilities to energized volunteer leaders, distributed organizing may be a better approach for you. Reading through the Distributed Organizing Guide should give you a better understanding of what type of organizing strategy makes the most sense for your campaign.

Getting the Help You Need When You Need It

One of the biggest tasks for any campaign is finding enough help to get the campaign across the line in November. Your needs will likely change throughout the campaign and you should try to plan for what help you will need and when. Fortunately, several types of people and groups can help.

Staff

Staff are paid employees on your campaign. They are the ones who are executing your campaign plan on a day-to-day basis. These team members have job descriptions that are clear to them, so they can focus on their responsibilities to help the campaign win. While paid staffers are great to have, many campaigns cannot afford to pay someone for their time, but there may be people who would be willing to volunteer their time to help you win.

Volunteers

Volunteers are unpaid supporters who support your campaign with their time and talent. Typically, these volunteers will be a large part of your organizing efforts whether they're out knocking doors, making calls, helping you staff a field office, or raising money. Keeping track and offering opportunities to volunteers is incredibly important in keeping your voter contact numbers up throughout the campaign.

Mobilize

With Mobilize, you can easily create an event and post it in minutes. Once volunteers are signed up on Mobilize, built-in automations present them with additional upcoming opportunities, ask them to invite friends, and more to help you scale your volunteer capacity quickly. Mobilize also syncs seamlessly with VAN, allowing you to collect and act on the volunteer data in My Campaign as well.

Create a Free Mobilize Starter Account Today!

Grassroots Groups

Grassroots groups will play an important role in helping to spread the message of your campaign. They can also help fill vital volunteer, field, and digital roles within the campaign. Spending time developing relationships with grassroots groups in your area can be a worthwhile activity to learn about the issues on their minds and, hopefully, build your volunteer capacity up as well.

Community Outreach

Community outreach is essential to every winning campaign. You'll want to meet with local elected leaders and community leaders to get a better understanding of the important issues in any neighborhood. Think of the list of people we mentioned before of people you'll want to meet with and build on it. Are there neighborhood associations that you may want to familiarize yourself with? Are there other well-respected individuals in the area that may be willing to speak with you or endorse your campaign? By conducting thorough community outreach, you'll continue to build your rapport with constituents and other community members who may be able to help you win your race.

Finance Plan

Now that you've thought about and planned nearly every aspect of your outreach, it's time to put a price on how much your campaign will cost. Let's look at how you can create a campaign finance plan.

What is a Finance Plan?

A finance plan is a comprehensive plan of all the finances related to your campaign. This plan includes your projected fundraising, expenses, and benchmarks for when you need to hit fundraising goals.

Here is where you look back at all the work you've done up to this point and start to put dollar figures to all those activities. All that information comes together in your campaign budget, the instructions for which are detailed below.

With a budget in hand, you can create a fundraising strategy that will help identify how you'll raise the money needed to win.

Budgeting

Budgeting for All Parts of the Campaign Plan

Campaigns can be very expensive and building a campaign budget is critical to figure out how much money you need to raise. Raising more than the budgeted expenses will allow you to expand your campaign, and raising less will require you to cut back. Too many cutbacks and you might find yourself unable to meet precinct vote goals.

Take a look at the following budget template and plug in any additional items you've identified from your research. The resources to which you have access might require you to forego certain things you see on this list. Use your best judgment and get advice from local professionals where they are available. Remember, you can always contact your local Democratic Committee for help and advice. They're also a great source of volunteers and local professionals.

Budget Template

	Unit Cost	Quantity	Total Cost
Staff			
Campaign Management			
Digital			
Field			
Compliance			
Finance			
Fundraising			
Events			
Direct Mail			
Advertising			
Collateral Materials			
Campaign Literature			
Yard Signs			
Campaign Swag (shirts, buttons, stickers, etc.)			
Research			
Message Poll			
Tracking Poll			
Media			
Online Ads			
Television			
Radio Buys			
Other Advertising			
GOTV			
Phones			
Canvassing Operations			
Texting			
Direct Mail			
Infrastructure			
Voter and Fundraising Database			
Email Software			
Travel			
Office Space			
Total Budget			$

If you aren't sure what your budget should look like, look at past campaign finance reports for similar races in your area. If all the previous winning campaigns for your level of office have raised $100,000 or more, but your budget is estimated at only $20,000, you might want to ask a professional to review your plan. Once you figure out your budget, you need to plan how you're going to raise that money and when you need to hit critical goals.

Goals and Benchmarks

Once you've determined how much money you will need to raise, you should create benchmarks that detail when those goals will be met. Remember to analyze these benchmarks often. Repeat what works well and cut out what falls flat. Sample benchmarks are shown in the table below.

Benchmark	Detail/Date	Amount Raised (cumulative)
Benchmark 1	Petitions	
Benchmark 2	End of Q1	
Benchmark 3	Primary GOTV	
Benchmark 4	End of Q2	
Benchmark 5	End of July	
Benchmark 6	End of August	
Benchmark 7	End of Q3	
Benchmark 8	General GOTV	
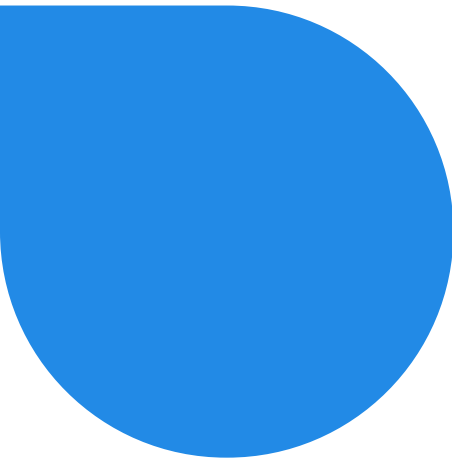
Fundraising

Fundraising is one of the most integral parts of any campaign. It's nearly impossible to run an effective campaign without raising money early to fund future expenses. Without raising money, you can't send mailers, pay for advertising, or host events to raise more money. Below, you'll find several popular strategies and tactics to help you raise more money to win your race.

Fundraising Strategies

Rolodexing

Make a list of everyone you can think of who may be willing to donate to your campaign. Start with your family and friends, peers, work colleagues, and anyone you're in a group with outside of work. Then, branch out from there. Think of anyone you went to high school or college with. Anyone you worked with in the past at your day job or on something else. By building out this list with contact information (phone numbers and email addresses), you can begin to build a solid foundation to fundraise from.

In addition to your connections, connect with other elected officials or former candidates who may introduce you to new donors. While most elected officials are cautious about introducing their donors to anyone, it can be helpful to connect with donors who may not look at your race otherwise.

Once you have a solid list of people who you have some connection with, begin ranking them by their likelihood and ability to give. By ranking these priorities, you can then allocate your time based on the low-hanging fruit first to get money in the bank while cultivating relationships with other donors who may not donate to you after your first appeal.

After you rank those contacts, think about how you should reach out to them. To raise more money fast, sending texts and emails to those who are likely to donate with varying ranges of giving is a great first step to building your fundraising base. However, if donors can give large donations (maybe $250 or more), it may be better to give them a call to build rapport with them and then make your ask. Donors may be more likely to give (or give more) if they are personally asked by you compared to receiving a general ask through a text or email.

You can build a simple table like the one below to get things started, but you'll quickly want to invest in a fundraising database (like NGP) to easily track results, record pledges, and pull reports. Our Donor Target Scores can also provide additional insight into your contact's giving history, allowing you to make an even more targeted ask.

Name	Phone Number	Email Address	Address	Ask Amount	Result

Donor Circles

It may also help to think about your campaign fundraising through the scope of Donor Circles, a diagram that helps illustrate the different groups of people who may donate to your campaign and when and why they may donate.

POWER
ANTI-OPPONENT
IDEOLOGY
PERSONAL
CANDIDATE
TIME
VIABILITY
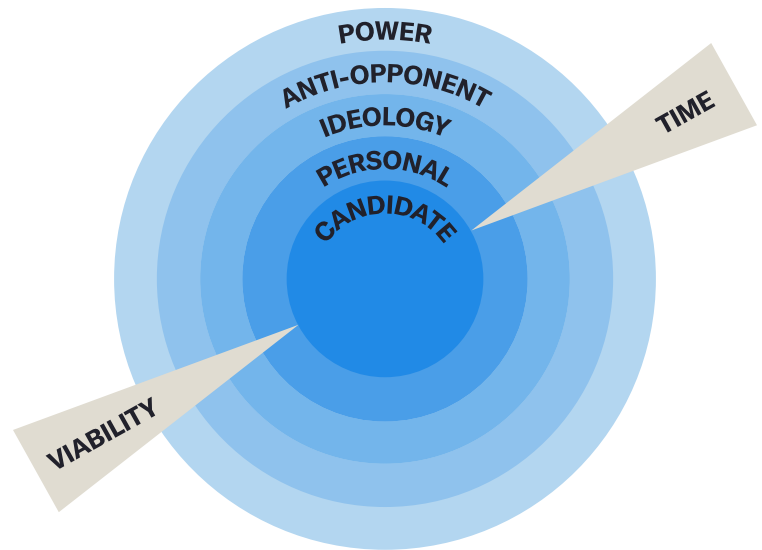
A candidate's personal network is composed of family, friends, and close professional contacts. They give to the campaign because they have a vested interest in seeing the candidate win, with less regard for ideology and viability. This is the first circle that a candidate should work with to fund early expenses and start raising money to use later in the campaign.

Ideological donors give because they are advocates for causes that the candidate supports. These donors may be part of other advocacy groups for the environment, reproductive rights, etc. And by donating to your campaign, they could potentially help advance causes that are important to them when you're elected. Ideological donors often give early in the campaign to ensure that their candidate has a strong standing in the race.

Donors in the anti-opponent circle give because they have a stake in defeating the other candidate. Their interests will be harmed by your opponent's victory, and they have a strong incentive to invest in your campaign to harm your opponent's chances.

Lastly, donors in the Power Circle give to protect and advance their professional and economic interests. They are interested in maintaining a positive relationship with elected officials, and give later in the race, often to both sides. Power Circle donors often support incumbents and will support candidates in open seats who are seen as viable, but give to challengers only when their competitiveness in the race has been firmly proven. Examples of Power Circle donors include business groups and professional associations, Political Action Committees (PACs), and labor unions.

Whichever fundraising strategy you choose, make sure to start building your list early so you can start raising the money you need to win. Before you start raising money, make sure you understand contribution limits and other campaign finance laws that are relevant to your race to ensure your fundraising efforts are compliant with the law. With this in mind, let's take some time to discuss call time, one of the best ways to raise money for your campaign.

Fundraising Tactics

Call Time

An effective call time program can help you raise the resources you need to win your race. After setting up your finance plan, you should know how much you need to raise and what you need to raise it for. Simply put, call time is one of the best tools for raising money to pay for your campaign expenses, but it requires a lot of time from both the candidate and finance staff to properly prepare for and execute a call time program effectively.

To ensure that call time is effective, finance staff should have call sheets or donor records prepared for the candidate in advance, including contact information, personal background, relationship details, past giving history, an ask amount, and any other important notes. While staffing the candidate during call time, take complete notes, debrief and offer feedback after each call, and if possible, assist in dialing on a second phone as they finish up their current phone call to save time and keep the process moving.

How to Make an Effective Call Time Ask

Antonia Koch
**Director of Fundraising Campaigns**

ngpvan

If you're nervous about starting your call time program, check out this video with our Director of Fundraising Campaigns, Antonia Koch, where she explains how to make an effective call time ask.

We've also got great add-ons available to make call time even more productive for campaigns:

Call Time Mobile

Call Time Mobile is our award-winning mobile fundraising app that revolutionizes how call time works. Instead of dealing with paper call sheets with donor information, campaign staff can quickly make a list in NGP and send it to their candidate's phone so they can make fundraising calls from wherever they are. Candidates can quickly see the donor's profile and log information after their calls. Staff can then follow up with donors via email or text message to secure their donation. And the best part? Call Time Mobile is available for free to all NGP users.
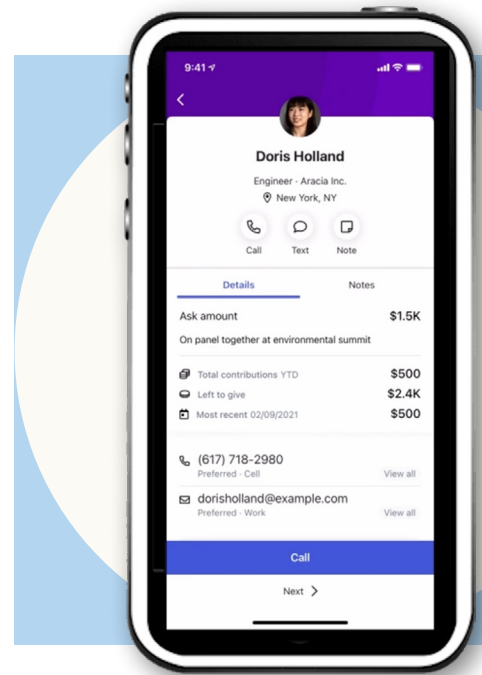
Learn More About **Call Time Mobile**

Call Time Connect

Call Time Connect offers click-to-dial functionality from NGP. It also allows multiple callers to be on the same call, allowing candidates to join calls that are already in progress or call time managers to finish a call while the candidate moves to the next call. Calls are routed through a phone number with an area code of your choice and all callbacks are routed to a campaign phone number to make sure you don't miss out on a call from a potential donor.

Learn More About **Call Time Connect**

Events

Events can range from small gatherings at a supporter's house to grand galas with high-dollar donors. It's typically a good idea to host events with different giving levels to attract all types of donors. Events typically attract mid-level donors because they allow some personal interaction with the candidate without requiring the time and effort of private meetings.

Assembling a host committee is a great way to build up resources quickly as hosts are expected to raise a certain amount of money through their donation and by getting other donors to attend their event. While some of the hosts may be caught up in the event details like what food to serve and what color of napkins they should use, the campaign should make it very clear that the goal of this event is to raise money and the hosts are responsible to hit the fundraising goal.

Typically, either an event planner or another team member will help coordinate the event itself. Planning a successful fundraising event includes:

- Deciding details such as time, date, and location
- Creating an event budget
- Recruiting the host committee
- Collecting lists of supports to invite (by mail, email, phone, etc.)
- Designing and sending invitations

- Recruiting volunteers to assist at the event
- Monitoring RSVPs and host committee performance
- Coordinating venue, food, speakers, and other logistics
- Preparing the candidate
- Doing a practice walk-through of the event beforehand
- Following up to thank attendees, volunteers, and hosts

While every event will have a different budget and timeline, for small to medium-sized fundraising events it is generally a good idea to start planning at least six weeks before the event date and have invitations sent four weeks before the event.

During and after the event, make sure to acknowledge and thank attendees and participants whenever possible. Within a week, send out thank you notes to all donors, including a personalized acknowledgment for host committee members and anyone else who took on a large role in helping plan or coordinate the event.

Fundraising events typically require a decent amount of time and effort to keep up with, but they also have a high potential reward. If you want to look at another way to raise money with less effort, consider sending fundraising emails or texts.
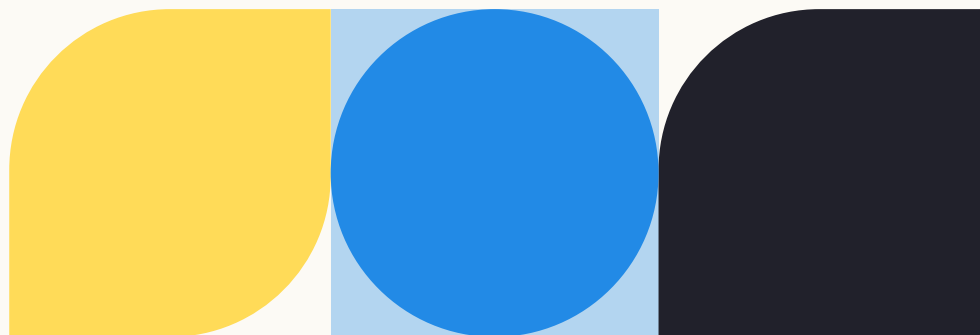
Email & Texting

Emailing and texting your supporters is another easy way to raise the resources to win. Emails and texts take less time to put together and send, but they have the potential to raise a significant amount of money. The key to perfecting these channels is constant testing. By optimizing your emails, you may raise your open and click-through rates just a few percent throughout the campaign. However, that can translate to increased engagement and even tens of thousands of extra dollars raised.

Emailing supporters continues to be one of the most common ways to raise money for political campaigns. However, you want to make sure your emails stick out amongst everyone's crowded inboxes. By learning more about how your supporters respond to different variables (subject lines, send times, message length, ask amounts, etc.), you can further optimize your messaging to ultimately lead to more money being raised for your campaign.

Targeted Email offers a reliable, powerful, and easy-to-use email solution to help you win your race that integrates seamlessly with NGP. By integrating with NGP, you can create highly personalized emails that appeal to donors based on their past interactions with your campaign. Every engagement, from clicks to donations, volunteer signups, and event attendance is tracked and synced back to NGP. You can also set up an email series to greet new subscribers with a chain of emails. This introduction series is a great way to build a lasting relationship with new subscribers that can help increase engagement and fundraising efforts over the campaign.

To learn how to grow your email list the right way, check out our webinar.

Advertising

Online ads are a great way to reach supporters who might not yet be aware of your candidacy. There are dozens of outlets that allow fundraising online and budgets can vary. Social media has emerged as a great outlet for reaching voters. Places like Facebook, Twitter, and other platforms have the potential to reach entire districts of online voters. Google's search and display capabilities, along with video ads on YouTube, offer additional ways to reach voters. There are several benefits to running online ads:

- Wide variety of targeting options and a massive reach
- Ability to be "surgical" with targeted message delivery
- Easy and relatively inexpensive to get started
- Nearly immediate results

Running paid advertisements is also a great way to raise money and build an online donor list. Ads can also be used to promote a petition, encourage attendance at events, or build an email list of supporters with the ability to automate follow-up responses via email, text, or a personal phone call from a volunteer.

Fundraising Software

Some campaigns raise the bulk of their budget completely online. That's why having good fundraising software is important to every campaign. Political fundraising software allows your campaign to track donors, contributions, and all your contact attempts in one centralized database. Software like NGP allows you to send emails or text messages to supporters with one-click donation capability to easily allow supporters to donate.

Some candidates start their campaigns with existing contact lists. Others can quickly put together their contacts from across various email programs, spreadsheets, and even their phone contact list. This is called "rolodexing" and it is often one of the first tasks finance professionals recommend candidates do before they start fundraising.

Donor Target Scores and Donor Target Reports

NGP software includes a feature called Donor Target Scores, which matches your existing contact list to our database of tens of millions of donors nationwide, and then uses AI and machine learning to tell you which of your contacts are likely to donate to your specific campaign and what their capacity to give might be. This information is attached to every contact record in your database and can be used to create reports and call sheets.

Donor Target Reports provides several pre-segmented reports, including:

Prospects Targets Report

Identifies potential donors who have not given to your campaign.

This Cycle Resolicit Report

Identifies donors that have given during this cycle and can legally give more.

Last Cycle Resolicit Report

Identifies donors that gave during the last cycle and have not given this cycle.

Each of these new reports has a Suggested Fundraising Effort, a metric based on a combination of the contact's Donor Target Scores Likely to Donate and Giving Potential. Suggested Fundraising Effort is marked in categories from "$" (low likelihood of donating and low capacity to give) to "$$$$" (high likelihood of donating and high capacity to give).

Suggested Fundraising Effort also recommends different fundraising actions to make an informed ask from a particular contact.
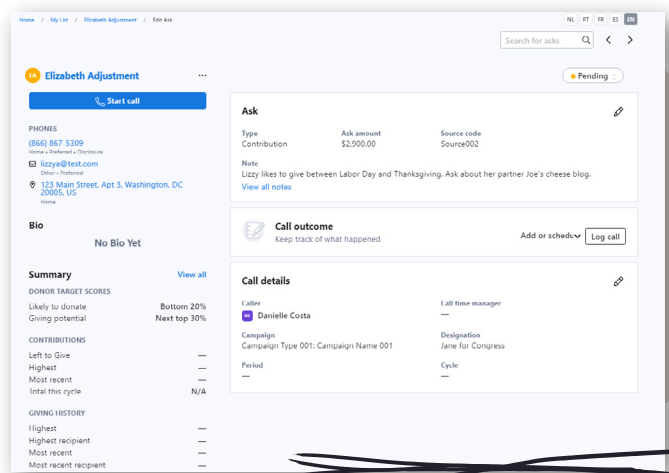
Learn More About **Donor Target Scores and Reports**

NGP has helped Democratic campaigns and organizations raise billions of dollars and we're the preferred fundraising database for campaigns of all shapes and sizes. We continue to innovate to build new features, like Donor Target Scores and Donor Target Reports, to empower fundraisers to raise more money. In addition to these innovative features, we also process online contributions with the lowest credit card processing fees in the industry, allowing you to keep more of the funds you raise.

Learn More About **Online Contributions**

Campaign Finance Reports

If you're raising money for your campaign, you'll also need to file campaign finance reports. Great fundraising software like NGP also allows your campaign to complete these legally required compliance reports, showing how much you've raised and expenses you've incurred during your campaign, and file them with the appropriate state and local agencies.

Filing Deadlines

Finance reports are due periodically during a campaign cycle. Some states require them quarterly, while others must be completed monthly or annually. As the primary or general election nears, reports are due more frequently, sometimes every day. Your campaign must meet finance filing deadlines. Missing them can incur steep fines and put your fundraising strategy in jeopardy. Filing deadlines are normally featured on each state's election calendar, which was part of your early research. If you do not have the time or expertise required to file your reports, you should reach out to a local compliance professional who is experienced with this type of work.

Compliance Software

NGP is the most widely used and trusted compliance database for Democratic candidates throughout the country. With NGP, you can file compliance reports in nearly every state and all FEC reports. Additionally, it allows you to file over 80 different types of disclosure reports. NGP integrates seamlessly with online and offline fundraising efforts, meaning a more convenient and reliable system to manage essential data needed to file accurate compliance reports.

Stay in control of your reporting by using built-in features like audit trails for accountability, error flags for incorrect data entries, and permissions that limit user access. Our dynamic data entry system tells you what data is necessary for every type of transaction. By having user-friendly compliance software, it's easier to reconcile and file reports to meet your campaign finance filing deadlines. We also provide additional support around filing deadlines to support campaigns when they need it most!

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Get a Demo

Implementing Your Living Campaign Plan

Putting Your Campaign Plan into Action

Your campaign plan is not something you develop and then place in a drawer never to be seen again. It is a living document — one that should be referred to regularly. You should share most parts of your campaign plan with your entire team, including consultants and volunteer leaders who fill the roles normally occupied by paid staff members.

Every segment of the campaign plan is a process — a roadmap for completing specific items you'll need on your road to victory. If your campaign has a team that handles each section of the plan, take time to conduct calls or meetings with those teams to make sure they understand the work that is needed from them to win.

## Test, Measure, Pivot (If Necessary) and Repeat

Devise a set of metrics for each team that will help determine and display how successful they are in their efforts and review tthese metrics often. You don't want to wait until Election Day to find out your field team has only found half of the votes you need to win. If a team doesn't meet their metric or benchmark, stop and take time to understand why they missed a goal and, using your plan, recommend a corrective course of action. If the same team consistently misses benchmarks, that might signal the need to change team members or team leaders.

Stick to your message and your plan. When things get hectic during GOTV and before Election Day, you'll be poised and in control, while others without a plan run around in all directions, stretching their resources and losing their cool.

Preparation is half the battle. Those who do good prep work, and who can convert that prep work into action, are usually the ones who get the win on Election Day. And remember, staying calm, cool, collected, and in control helps wins races too!

What to Do on Election Day

Election Day is here! All your work has led up to this important day, and now it's a sprint to the finish line. Here are a few guidelines and suggestions for how to handle Election Day:
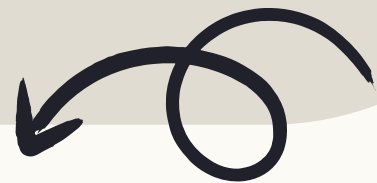
War Room

On some campaigns, they create a "war room," a closed-off space where staff and key volunteers can crunch numbers throughout the day and move remaining resources to where they are needed most. Most campaigns use VAN to help analyze where turnout is strong or where it might be weak, and quickly put together lists of people who have not voted. You can even print tear sheets, which can be used at the polls to mark off voters as you see them entering the polls. The remaining tabs are for voters who you expected to show up, but who have not yet voted.

While your opponent struggles to figure out who is left to contact, you can also easily use VAN to spin up a Virtual Phone Bank and have volunteers call voters who haven't voted to get them out to the polls. Every vote counts, and some campaigns have won their race in the final minutes of Election Day by making phone calls and knocking doors to turn out these last remaining voters before the polls close. Remember, you're aiming for 50% + 1, and you want to make sure you don't leave any votes on the table.

Election Day Itinerary

It's important to have an Election Day itinerary that walks you through all the places you need to be on Election Day. Mostly, you'll be visiting important polling locations, and those are outlined with times and addresses on your itinerary. It's up to you and your staff to keep moving throughout the day and hit as many polling locations to talk to as many potential voters as possible.

Here's an example of what an Election Day itinerary may look like:

Staff	Address	Time	Notes
Community Center	100 Community St.	7 AM–9 AM	No candidate signs permitted.
College Campus	5678 College Ave.	9:15 AM–11:15 AM	Refer to the campus voting list in your Election Day Packet.
Lunch		11:30 AM–12 PM	
Main Library	901 Knowledge Pl.	12:15 PM–2:15 PM	Use special palm cards for this audience — also in your packet.
City Hall	123 Main St.	2:30 PM–4:30 PM	
Pavilion	456 Coliseum Way	4:45 PM–Polls Close	Smile and have fun!

Some of you may want to swing by your campaign office to thank volunteers, go to specific polling locations, or learn about the results of their race before you go to an election night watch party. Add those stops to your itinerary if needed. Providing food and drinks for your team, who will likely be working all day, is a nice touch — just make sure to work that into your budget ahead of time.

Election Day Do's and Don'ts

Whether you host a war room or spend your entire day at the polls, here are a few additional tips to keep in mind during Election Day.

Do

- Contact as many voters as possible by whatever means possible

- Get out to the polling locations with your team and talk to voters

- Make sure you and your surrogates are aware of activities not allowed at polling locations. For instance, candidates might be required to stay outside the location, post signs a certain distance away from the front doors of the polling location, etc.

- Relay progress to the team throughout the day, specifically who has and has not voted

Don't

- Assume all the voters have made up their minds as to who they are voting for on Election Day

- Forget to remove people who have already voted from your lists

- Stop contacting remaining voters until the polls close

What to Do the Day After Election Day

Congratulations! You made it through Election Day, and if you followed the advice in this guide, you've set your campaign up for success.

It can sometimes be hard to wind down after the year-long sprint of a busy campaign. However, there are a few things that you should do after Election Day, regardless of how the results turned out. Take time to thank your supporters, staff, volunteers, family members, and friends for all their work and help. Share a post on social media, send an email, and communicate directly with anyone who went above and beyond to help your campaign. If you've planned a post-election party, it's a great place to do all those things in one place.

If the election results are available after Election Day, compare the results to your precinct vote goals and see where you over or under-performed. This data is incredibly important to analyze after the election so you can have an idea of your strengths and weaknesses if you decide to run again. It also helps find any irregularities that might have been present on Election Day. While rare, issues can arise, and if caught quickly, election officials can address any areas of concern.

In addition to analyzing data, another best practice is conducting an election debrief with key stakeholders on your campaign. Part of this conversation will focus on the data, but you will also want to review all the other aspects of your campaign. Did you hit your goals in other areas of the campaign (fundraising, volunteer capacity, etc.)? What would you change about your campaign in the next cycle? By documenting all of this, you can use it as a reference if you decide to run again in the future, but you can also rest assured that you addressed everything you wanted to achieve during your campaign.

If you won, congratulations! We know you worked incredibly hard, and we're so proud of you. We can't wait to see what you do in elected office, and we hope to work with you on your re-election campaigns!

However, if you didn't win, we know it can be difficult to lose after a hard-fought campaign. Take heart in all the things you did accomplish, the people you met, the new relationships forged, and the stories you heard from voters across the district. Understand that by running for office, you allowed voters to vote for change, and even though you lost — you may have sparked a movement that will bring about change in your district. Review your data, thank your team, and work to improve your chances of success if you decide to run again.

Get Out There and Change the World for the Better!

After reading through this guide, we hope you've gained a better understanding of what you need to do to run a winning campaign for local office. All that's left to do is declare your candidacy and get out there and run your race.

And remember, NGP VAN is just an email or phone call away. With a full suite of campaign tools, we've got the best political software available to help you raise money, organize and engage supporters, and turn voters out so you have the best chance to win your race and change the world for the better.
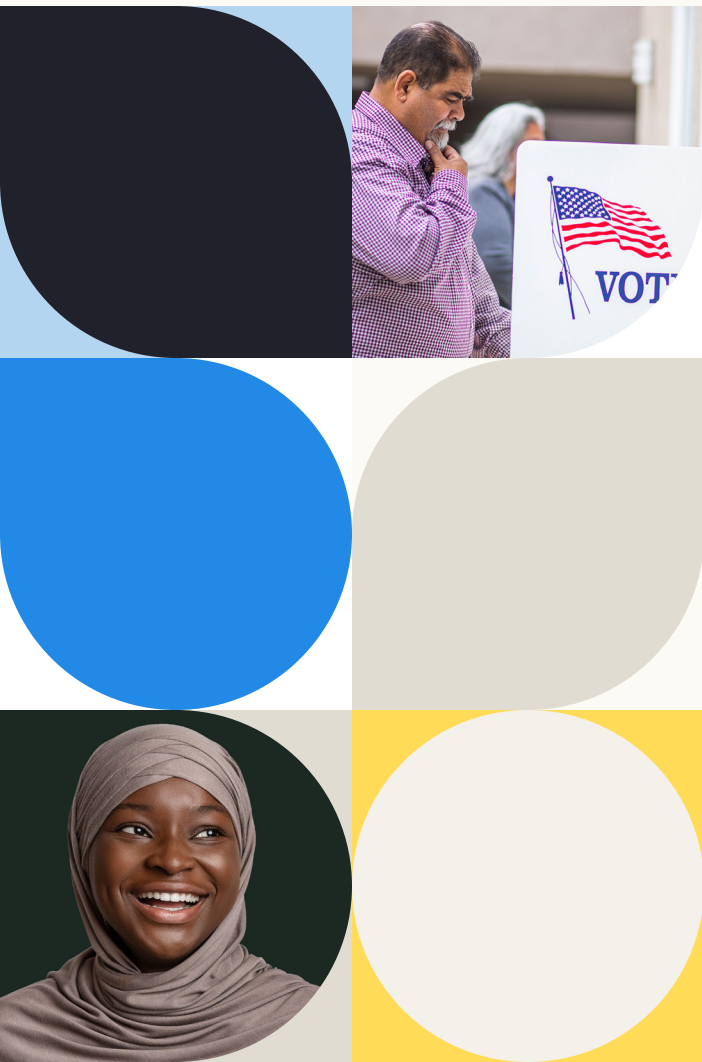
NGP VAN Has Everything You Need to Achieve Your Goals.

Our industry-leading organizing, fundraising, compliance, and digital tools have helped power more victories than any other tool in the progressive tech space. We're proud to power campaigns up and down the ballot every cycle, and we look forward to partnering with you to help you win your race.

Learn More