

Video One: In the Beginning  
With Aviva Pat, Treasurer, NHPO

## **CAMPAIGN STRUCTURE**

### Introduction

The goal of every campaign, large or small, is to reach the largest possible number of voters, identify which ones support the candidate, and get those people out to vote by Election Day. Well financed campaigns will use mailings, media outlets, and precinct and phone canvassers. Low budget campaigns can get the word out by having enough volunteers in the precincts, on the phones, and at public meetings and high traffic areas to distribute literature and talk about their candidate. To reach this goal, every kind of campaign must cover several basic functions. Each may be handled by one person, who concentrates in that particular area, or by a group of people who share the responsibility for seeing that the basic functions are covered.

### BEGIN VIDEO

#### Section One: Timeline (0:00)

Below you will see an 18 month timeline based on a February 22 election (what Aviva refers to as “page 5”). This video was taped in October, several months prior to the elections. It is recommended one start much sooner however.

### **Timeline for an Election Calendar**

This Time Line is for a February 22nd Aldermanic Election, but can be adjusted to any date. The dates are left in as an illustration, but can be changed to suit your election by calculating backwards from Election Day. Examples of necessary campaign instructional materials and forms can be found in the relevant video sections or in the sample form section

**New in 2011:** Recent changes in the Illinois Election Law include an early voting period – check with the Chicago Board of Election Commissioners (or the applicable Election Board) for dates and locations of early voting. There may also be a Registration Grace Period immediately preceding the elections, during which Deputy Registrars may not take registrations for the upcoming election, and individuals may not submit Motor Voter cards.

PLEASE NOTE: The Calendar for the campaign proper is calculated backwards from Election Day (Day -71, -65 etc.) The exact dates for nominating petition and registration activities are set by law.

1<sup>st</sup> Sunday after Labor Day, 18 months before the Primary Election in which the Candidate plans to run:

- Organize meeting of the Campaign Committee called by the Campaign Chair and the Candidate.
- Plans must be made to fill the following Campaign roles: Finance, Public Relations, Coffee, and Visibility Chairs, as well as Campaign Manager, Precinct Coordinator, and Office Manager.

- Fund raising and volunteer goals need to be set for the following 5 months. Adherence to realistically set goals should determine whether or not the campaign will be viable. Remember it is often better not to expend the energy of volunteers and the resources of supporters now, if goals are not being met, than to foreclose the chances of mounting a more credible campaign in a few years.

#### September - June:

- The Campaign Committee should meet regularly to assess progress toward goals, reassess budget, and exchange information on sources of money and other support, e.g., recruiting district VIP's for the Citizen's Committee.

#### June - August:

- Look for a campaign office for September 1.
- Interview and hire a Campaign and Office Manager for October 1. These may, of course, be volunteers.
- Finalize the campaign budget, names of Honorary Co-Chairs, Citizen's Committee, endorsers, and all chairs of campaign committees.
- Identify and/or hire a Precinct Coordinator who should be on board as soon as possible after Labor Day. The Precinct Coordinator should begin recruiting Area Chairs Precincts Captains and Precinct Workers from the Candidate's "network" of contacts in civic, church, professional, etc. organizations in which s/he is active, as well as from list of former workers from earlier campaigns. Those recruited become the foundation of the campaign database, and the beginning of the precinct structure. The first task of this structure is to circulate nominating petitions for the candidate. The Petition Drive can be run from the Candidate's basement or any space someone will donate or rent cheaply. At least two phone lines are needed plus volunteer help for the Precinct Coordinator. Until a new candidate is sure that the petition drive is a success, s/he may choose not to open an official Campaign Office, even if s/he can afford to. The Precinct Coordinator must plan a Petition Circulator's meeting and oversee assembling the materials which will be needed.

#### August 15:

- Petition Circulator's Training Meeting, conducted by the Precinct Coordinator or some other knowledgeable person. At the meeting it should be announced that November 11 & 12 will be the target dates for collecting all petitions. A schedule of Report Nights should be given, to keep track of the number of signatures being collected.
  - **MATERIALS NEEDED:** Candidate petitions and those of other cooperating campaigns. Candidate bios. Instructions for Petition Circulators. Poll sheets.

#### August 24:

- 90 days before the last day for filing petitions, and therefore the 1<sup>st</sup> day on which petitions may legally be circulated.

#### September 1 (Optimal, but no later than October 1):

- Lease Campaign office through February 28th.
- Hire Campaign and Office Managers through February 28<sup>th</sup>; ensuring they will also be available through April 10 should there be a run-off.
- Start clean-up and preparation of office. Borrow, lease, or buy furniture, computer, copier, etc. Have telephones installed.
- Look for someone who can design attractive campaign literature.
- Decide how many district-wide mailings the campaign can afford. These mailing dates must be on the Office Manager's calendar so that s/he knows when volunteers must be available.
- Purchase the database of registered voters, including voting history for the past 4 years, for your district from the Chicago Board of Elections (or the County Clerk outside of Chicago). These will be used to generate walk sheets and to verify that the people signing your petitions are registered voters.

#### September 5:

- REPORT NIGHT - have notary present for any petitions that are turned in.
- Area Chairs collect information on number of signatures from Precinct workers. Also inquire about comments from voters, and supplies needed by Precinct workers.
- Area Chairs report to PRECINCT COORDINATOR.

#### September 6:

- Mailing to everyone in the database announcing the Grand opening of the Campaign Office on September 19. The 19<sup>th</sup> is also a Report Night, and the announcement should urge those presently circulating petitions to bring their completed sheets, as a notary will be present. The announcement should have a tear-off asking for volunteers and contributions.

#### September 12:

- REPORT NIGHT - have notary present for any petitions that are turned in.
- Coffee Chair should be recruiting Coffee Host/Hostess'
- The Office Manager sees that all Coffees are on the Calendar, that Area Chairs know when Coffees are happening in their Areas, and that contributions and Volunteer Cards from the Coffees are received promptly by the office.
- All planned mailings should be on the calendar (Notices for Registration Workers' Meeting, Canvass Workers' Meeting, Election Day (ED) Worker's Meeting, district-wide mailings, etc.)

#### September 19:

- GRAND OPENING and REPORT NIGHT – have notary present for any petitions that are turned in.
- Have Volunteer Cards filled out by all who attend. Give extra Cards to anyone who will recruit more workers. The Candidate should always have Cards with him/her. It is important that these be returned to the office promptly so that they can be called as soon as possible after they volunteer.

September 26:

- REPORT NIGHT - have notary present for any petitions that are turned in.
- Determine if a projection of the number of signatures already reported is enough so that you will file at least twice the required number of signatures in a race with no maximum requirement. If not, then volunteers should go to high traffic areas to collect additional signatures which will provide an extra "cushion" to protect against possible challenges. Also, the Candidate can collect signatures either door-to-door or in high traffic areas. This provides a good chance to introduce her/himself to the voters.

October 3, 10, 17, 24, 31:

- REPORT NIGHTS - have notary present for any petitions that are turned in.

November 5:

- If not yet done, file Statement of Economic Interest with the County Clerk

November 7-11:

- Final return of petitions. Two notaries should be present each evening.

November 11:

- Collect and notarize petitions from workers who have not turned theirs in.

November 12:

- Candidate completes and has notarized Statement of Candidacy and Loyalty Oath (optional). Be sure candidate has receipt from County Clerk from filing Statement of Economic Interest.

November 13:

- Assemble and consecutively number all the petition sheets you plan to file. Make 2 copies of all petition sheets and the 3 accompanying forms. Using a two-hole punch, punch the Statement of Candidacy, Loyalty Oath, receipt for Statement of Economic Interest, and all petition sheets, and bind securely.

November 15:

- FIRST DAY TO FILE NOMINATING PETITIONS
- File petition package with the appropriate election authority at the opening time of their office, in order to be in the lottery for first place on the ballot.

November 22:

- LAST DAY TO FILE NOMINATING PETITIONS

November 30:

- Last Day to file objections to nominating petitions:

Day -85 (November 29):

- Mail notices for Registration Workers' Training Meeting.

Day -79 (December 5):

- Registration Workers' Training Meeting.
- Announce Report Nights. Precinct Coordinator or person conducting the meeting distributes National Voter Registration Act (NVRA) Forms (available from County Clerks and Chicago Board of Election Commissioners). Workers should be instructed to have a new voter or a voter needing to change her/his name and/or address, fill out and sign the form and return it to the worker. These forms should be turned in to the office or the Area Chair. They should be copied before being delivered to the appropriate election authority.
  - MATERIALS NEEDED: Candidate Registration piece, which should have candidate and registration information on it. This is for distribution to anyone a precinct worker contacts. Also, Voter registration instruction sheets, Poll Sheets, Report Forms and Absentee Ballot information.

Day -72 (December 12):

- REPORT NIGHT.
- check number of registrations, remind workers to bring completed NVRA forms to office or AC

Day -65 (December 19):

- REPORT NIGHT. *(If holidays such as Christmas and New Years fall the day before, on, or the day after a report night, you can skip.)*

Day -61 (December 23):

- REPORT NIGHT.
- 1<sup>st</sup> day to apply for a mailed Absentee Ballot

Day -54 (December 30):

- REPORT NIGHT.
- After New Year, you should hold Report Nights every Thursday and Sunday.

Days -47, -44, -40, -37, -33 (January 6, 9, 13, 16, 20):

- REPORT NIGHTS

Day-43 (January 10):

- Order literature needed for Canvass Meeting.

Day -36 (January 17):

- Mail Notices to Precinct Workers for the Canvass Meeting

Day -31 (January 22):

- Canvass Meeting.

- MATERIALS NEEDED: Candidate literature, poll/walk sheets, "How to Win Elections" instruction sheet, canvass report forms, pins, posters

Day-28: (January 25):

- LAST DAY TO REGISTER TO VOTE

Day -27 (January 26):

- REGISTRATION GRACE PERIOD BEGINS

Day -26 (January 27):

- REPORT NIGHT.
- Precinct Captains and Area Chairs check on materials needed by precinct workers and confirm their areas of coverage.
- Continue to recruit volunteers to cover the most favorable precincts and then remainder of the district.
- Precinct Coordinator should develop a list of buildings or complexes where precinct workers cannot go door-to-door because of high security arrangements. The Office Manager will recruit volunteers to call into these areas.

Day -23 (January 30):

- REPORT NIGHT.

Day -22 (January 31):

- FIRST DAY FOR EARLY VOTING AT DESIGNATED LOCATIONS (*Verify the exact dates of early voting with your governing Board of Elections.*)

Day -19 (February 3):

- REPORT NIGHT.
- Send letters to relevant election authorities requesting 2 Candidate Poll Watcher's Credentials for each precinct in your district, and one Judge of Election Manual for each precinct. Request credentials as well from cooperating campaigns and civic organizations.

Day -16 (February 6):

- REPORT NIGHT

Day -15 (February 7):

- Start Election Day (ED) calling from volunteer pool. Get new poll sheets.

Day -12 (February 10):

- REPORT NIGHT.
- Ask Precinct workers for +'s, -s, O's.
- Get ED schedule sheets and ED cards to Area Chairs and Precinct Captains to record precinct workers ED hours.

Day -11 (February 11):

- Send all materials for ED which must be printed to the printer. Plan to reproduce all other materials needed for ED Workers' Meeting and for ED.

Day -9(February 13):

- REPORT NIGHT.
- Area Chairs return ED schedule sheets and ED cards to office.
- Start ED scheduling.

Day -8 (February 14):

- Mail notices of ED Workers' Meeting.

Day -7 (February 15):

- LAST DAY OF REGISTRATION GRACE PERIOD (*Verify the exact dates of early voting with your governing Board of Elections.*)

Day -5(February 17):

- REPORT NIGHT.
- Remind PWs about ED Workers' Meeting
- LAST DAY OF EARLY VOTING PERIOD AT DESIGNATED LOCATIONS (*Verify the exact dates of early voting with your governing Board of Elections.*)

Day -3 (February 19):

- ED Worker's Meeting conducted by Precinct Coordinator or other experienced person.
- Precinct Captains prepare 2 sets of Runner's Slips for ED.
- Give out workers assignments for ED & give out kits to openers.
- MATERIALS NEEDED FOR ED KITS:
  - Sample Ballots or ED candidate piece (palm card) and possibly pieces from cooperating campaigns. There should be enough of this material to distribute to + and 0 voters on Sunday and to distribute on ED.
  - Instruction Sheets - "How to Win on Election Day" opening and closing the polls, and Election law excerpts on Instruction & Assistance.
  - Credentials, Hard Card, List of Polling places, Runner's Slips (with Candidate's name and ballot number and polling place location), Scotch Tape, Results Sheets, black pencil, posters and string, ED Schedule Sheet, pins
  - Judge of Election Manual with list of important emergency phone numbers stapled to the cover.

Days -2 & -3(February 19 & 20):

- Area Chairs call all ED workers who did not attend ED meeting, confirm ED assignments, and deliver kits to any who are openers.

Day -2 (February 20):

- Sample Ballots or Candidate's ED piece distributed to all + and 0 voters.
- Plus lists turned in to office, copies made and returned to Area Chair and/or Precinct Captain.

Day -1 (February 21):

- ED schedules revised, copied, and distributed to Area Chairs for distribution to precinct captains that night or first thing on ED.

Day 0 (February 22):

- ELECTION DAY and Victory Party

Days +1 to +6 (February 23 to 28):

- Send thank you letters to everyone on the data base.
- Save the Master File for the candidate.
- Clear out the office.
- Get back any deposits.

### Section Two: Creating the Committee (1:30)

The goal of every campaign, large or small, is to reach the largest possible number of voters, identify which ones support the candidate, and get those people out to vote by Election Day. Well financed campaigns will use mailings, media outlets, and precinct and phone canvassers. Low budget campaigns can get the word out by having enough volunteers in the precincts, on the phones, and at public meetings and high traffic areas to distribute literature and talk about their candidate. To reach this goal, every kind of campaign must cover several basic functions. Each may be handled by one person, who concentrates in that particular area, or by a group of people who share the responsibility for seeing that the basic functions are covered. The Campaign Committee is the group which is responsible for these basic functions.

### **Committee Components**

A committee is necessary for your campaign – these are people who work in your campaign and have committed to taken this responsibility. These are not advisors – they are workers. The most important are:

1. The Campaign Chair – heads and oversees the formation of a Campaign Committee, and chairs the weekly Committee meetings. As the candidate is not involved in the day-to-day operation of the campaign, the Chair should be someone the candidate trusts implicitly to run the committee and oversee the Campaign Manager. Ideally, he Campaign Chair is also a well-known person in the community. If this is not the case, an honorary Chair or Co-Chairs should be selected to attract others to the Committee. Recruiting and expanding a high quality Campaign Committee is valuable to many aspects of the campaign, not



only operationally, but for public relations, as the names of the Committee appear on campaign literature, on the campaign letterhead, and publicity releases. The Chair can also be an important fundraiser.

2. Treasurer – responsible for maintaining accurate records of all income and expenditures. S/he also sees to it that all legally mandated Campaign Disclosure Forms are filed in a timely manner and that all tax laws are complied with.
3. Campaign Manager – oversees the actual operation of the campaign. S/he develops strategy and coordinates its implementation at all levels of the campaign. S/he outlines strategy options to the candidate and the campaign committee which s/he thinks are practical for the campaign to follow. S/he coordinates and oversees all campaign staff and volunteers.
4. Precinct Coordinator – central to any grass-roots campaign, and must be an experienced person. S/he is responsible for putting together the basic on-the-ground structure of the campaign. The Precinct Coordinator is responsible for the formation of the precinct organization, for the training of volunteers, for receiving worker's reports, and coordinating the petition, registration, and voter canvass drives, as well as organizing Election Day activities.
5. Finance Chair – recruits a Finance Committee to develop prospects to solicit for contributions and determine the ways of raising money most suitable to the communities in which the campaign is conducted. This group organizes mailings, benefits, and other fund raising activities. The Finance Chair also schedules and oversees the candidate's direct solicitation efforts.
6. Public Relations Chair – coordinates the production of all publicity and communication with the media. Depending on the size of the campaign, the PR chair may also be responsible for the production of campaign literature, posters and buttons. In some campaigns, the PR chair will also do issue research and write position papers for the candidate. The primary function of the PR chair is to get the candidate's name familiar with the votes and build the sort of image that will make workers enthusiastic to work in the campaign.
7. Office Manager – in charge of the operation of the campaign headquarters. This job can entail everything for maintaining office supplies to organizing volunteer work at the headquarters to handling petty cash. More specifically, the Office Manager is responsible for keeping records of all potential workers, organizing mailings, producing in-house communications, preparing for rallies and training sessions, telephone campaigns, handling conflicts within the office (if possible) and coordinating office volunteers. An office manager must be extremely well organized, willing to work long hours and have the temperament

and ability to deal with all kinds of people.

8. Volunteer Coordinator – works closely with the Office Manager to keep the office filled with volunteers on a daily basis. S/he will call through all of the volunteer cards after they have been contacted for the precinct organization, to recruit and schedule office volunteers.
9. Scheduler – responsible for scheduling candidate appearances, preparing the schedule and ensuring the appropriate follow-up is done. ALL requests for the candidate's time, including personal and family time, are submitted to the scheduler who makes the decisions in consultation with the campaign manager. Proportions of the candidate's time each day should be allocated to different types of events and different areas, and to satisfy well-defined goals of raising money.
10. Coffee Coordinator – convinces lots and lots of people to host a coffee for your candidate. The coffee coordinator is responsible for delivering to a host the appropriate campaign materials including instruction sheets and invitations, recruiting and training of coffee chairpersons, and scheduling and briefing the candidate for each appearance. Campaign coffees are critical to recruiting volunteers, raising money, and meeting voters.
11. Visibility Chair – because name identification is so important, a VISIBILITY crew, often made up of high school and college students, is created to ensure that hundreds of posters are placed in windows or homes and stores; and that as many people as possible are induced to wear campaign buttons. A Chicago City ordinance makes it illegal to put campaign materials on trees, lampposts, and other public property; campaigns that do so are subject to substantial fines. Most other municipalities have similar ordinances. For this reason, yard signs (placed only with the consent of the property owner) have become prevalent. While there's truth to the old adage, "signs don't vote," and visibility can never take the place of a door-to-door precinct operation, it is an important component of your campaign. It not only familiarizes the candidate's name, but provides a huge morale boost to your workers, who will be encouraged by the visible show of support in their precincts. A visibility crew can also be utilized as "blitzers" when a decision is made to drop literature or other campaign material in precincts that are not covered by a precinct captain or worker. Federal law prohibits anyone but the Postal Service from putting materials in mail boxes, so literature should be placed in a storm door, tucked in a door handle, etc.

### Section Three: Budget (6:15)

Below is a sample budget for your campaign. Actual figures may vary, but this is a good estimate. You may get volunteers, and for some areas this is appropriate. For others, it is important to pay. Campaign manager and office manager are two positions that are

paramount to the campaign - paying employees ensure they will treat it like a job (which it is!) and commit. Invest in good fundraising and legal advice as well.

#### Section Four: Managing the Campaign Office (17:30)

Make sure the campaign office is open on nights and weekends – this is prime campaign time. People are home from work and can come and volunteer. If you cannot afford to keep the office open at all hours, make sure that it is open nights and weekends.

The master file is the most important tool of the campaign. Every single human being on the face of the planet that the candidate knows should be in the master file! The two largest dumps of information for this master file will come from the candidate and the petition drive.

#### **Managing the Campaign Office – The Office Manager**

Most political campaigns attract 250 or more volunteer workers to cover the ward, house or senate district, and more for a congressional district. But campaign budgets, regardless of the size of the political district, usually can afford only two or three paid staff people: a campaign manager, an office manager, and sometimes, a precinct coordinator. The role of the office manager is a very important one.

#### **What qualifications to look for when hiring an office manager:**

- Political experience and sense; community understanding
- People skills
- Supervisory skills
- Recruiting skills
- Sense of organization
- Carefulness with detail
- Office skills

It may seem amusing that the least important qualification for an office manager is the area of office skills, but that is the case in a political campaign. You can always recruit a typist and an alphabetizer, but understanding campaigns and the political setting of that particular campaign and the neighborhoods which make up the political district are irreplaceable skills for a good office manager.

#### **What is the job of the office manager?**

1. *Greet the public in person and by telephone.* A good office manager has a very pleasant, inviting personality and a way with people. S/he should be able to handle most public inquiries about the campaign and assess where a walk-in volunteer can best be utilized by the campaign. Knowing how to handle hangers-on, disruptive drop-ins, and possible “spies” from the opposition camp are all part of the game. The office manager should be kept informed about campaign activities so s/he can answer 95 percent of the inquiries (for instance, “Where is the coffee being held tonight?” or “What’s the candidate’s position on gay rights?”). Having a very business like (but friendly) atmosphere helps to discourage the hangers-on that

frequently are attracted to campaigns...so the office manager should put volunteers right to work!

2. *Recruit volunteers to help in the office.* At the very beginning, s/he may have to rely on personal friends and the candidate's spouse and steering committee members to get out initial mailings, etc. But as names come into the office via the check-offs on campaign return envelopes or cards, coffee recruited names, or candidate generated names, the office manager (or volunteer coordinator) should within one or two days of getting a name call and schedule a potential volunteer into the office. The office manager should urge the potential volunteer to be specific about when they'll be in, give information about public transportation and directions on getting to the office, if needed, match people who need rides with those who are driving from the same direction, etc. Recruit three or four times the number of volunteers needed; volunteers frequently don't show up--they are, after all volunteering and take the commitment more lightly than a paid job.
3. *Train and supervise office volunteers.* Always have something for volunteers to do. Never, ever say "Gee, we don't have anything for you to do today..." (Unless you want to get rid of that person!) Even if you have to take a card file to the back room, toss it on the floor, and bring it back and ask the volunteer to alphabetize it, so you always have something for them to do!! Know the capabilities of the volunteers. Some are good at internet research, some are abysmal at data entry, some enjoy phone work and some are too shy and hate it; etc. Save a few jobs for the youngsters (folding letters, stuffing envelopes, counting but and bundling literature, etc.)

Since campaign files and office work is usually quite different from people's ordinary experience,

- a. be very clear about instructions on how to do the job;
  - b. give the instructions orally and then give the volunteer a written sheet saying the same thing so they can refer back to it;
  - c. do a few samples showing just what you want them to do;
  - d. stay and watch as the volunteer does a few themselves,
  - e. tell them you're right there if they have any questions; and
  - f. go back over to glance at the volunteer's work about three or four times during their stay. It is always disappointing to have a task worked on by a volunteer, only to discover after they've left, that it wasn't done right all along. Once trained, close supervision won't be necessary the next time the volunteer comes in if they're to do the same thing.
4. *Maintain most of the campaign records and files.* This all-important task is vital to the very lifeblood of the campaign, but it is also preparation, hopefully, for the re-election campaign once you're successful, and useful to future candidates who might run in portions of the political district at a later date. It is rare for an office manager to have to handle the financial disclosure report forms or the checkbook,

but if contribution records are kept adequately, the job of whichever volunteer does those reports is greatly eased.

The master file is the most important tool of the campaign. It will be used to support the precinct and fundraising operations and to recruit volunteers for Election Day. Every person the campaign touches, in a significant way is in that file. Spouse/partner names, home and office numbers, smalls, zip codes, apartment numbers, ward and precinct numbers, source of the name -- all are recorded and constantly updated. This is the comprehensive file of all the individual working files of the campaign -- and not one person should be missing if they're involved in any way in the campaign. After Election Day it will be the most precious asset from the campaign -- a complete list of everyone who supported, in any way, your candidate. The campaign should keep its master file in a database. This will ensure that all names can be properly referenced and sorted for the specific needs of the various campaign functions. Individual files can then be generated for the precinct coordinator, fundraising chair, coffee coordinator, etc. The campaign can purchase its own computer, borrow one from a willing campaign participant, or rent one. The records should be backed up daily and backups kept at a secure off-site location so that they will be safely preserved.

5. Generate thank you notes for all contributors and volunteers. This is one of the most important, yet overlooked, tasks in a campaign. Every contributor and every volunteer should receive a thank-you note signed by the candidate. Each day after donor information is entered in the database; a thank you letter should be generated, and then personally signed by the candidate. Donors like to know that the candidate is aware of their contribution and acknowledged donors are more likely to become repeat donors. Thank you letters to precinct workers should be sent after the petition drive and the registration drive. Short personal notes may be added for exceptionally generous donations or special achievements in the precincts. Every contributor and volunteer receives a thank you note again after Election Day.
6. Convert office volunteers into precinct workers. The basic maxim that you will find many other places in this manual must be repeated here: elections are won or lost through door-bell ringing. Precinct work is what makes or breaks the candidate's chance to win. Office volunteers should be seen as expendable; they are much more useful to the campaign if they will go door-to-door; and they are easily replaced. So the goal is to have all office needs taken care of by volunteers who are either not physically hardy enough to walk the streets, or too painfully shy to approach their neighbors face-to-face or too young. Anybody else who can walk and talk should be convinced, by the office manager if they start out as office volunteers, that the BEST way to help elect their candidate is to become a precinct worker!!

Phone canvassing is another activity which office volunteers should be encouraged to undertake. Phone canvassing has become increasingly important because of

security systems in more and more buildings. The Precinct Coordinator should alert the Office Manager to such buildings and give him/her poll sheets covering them. Everyone who comes into the office should be asked if they know someone who lives in these buildings. When residents are identified, an attempt should be made to recruit them do the calling into that building. Just as a neighbor is the best precinct worker, so a neighbor is the best caller. If the resident isn't willing to call, ask to use their name when making the calls. If no contact can be found in the building, office volunteers who are good on the phone should be provided with a brief script and given a portion of the poll sheet to call into that building. A reverse phone directory saves a lot of time for this process. Later in the campaign, a direct mailing to tight security buildings may be useful.

7. Office supplies and cleanliness of the office. The office manager is a scrounger! As many office supplies as possible, computers, and other office machinery, should be procured as donations to the campaign. Inventory control of vital items like paper, computer supplies, etc., is the job of the office manager. Keeping the office clean and organized is very important to the public's image of the campaign and the comfort of the volunteers and the rest of the staff. Campaign offices usually are unsavory storefronts which remain unrented because they are unrentable (ugly), so the office manager should make it as cheery a place as possible. And CLEAN.

#### Section Five: Volunteer Cards (21:40)

An incredibly important tool to recruit and keep track of workers for your campaign. Contrary to popular belief, campaigns are not just about disseminating information; they are about collecting it as well.

#### Section Six: Schedule (23:00)

You have to make your time available for the campaign. It is the number one priority of your life for the duration of the campaign. You cannot go on vacation, you cannot leave – people are giving up their time to work for you, you must do the same for yourself. If there is some extraordinary exception you can quickly leave for a day, but try to avoid leaving at all costs. You can carve out a little time for yourself, but you do have to make the campaign the absolute number one priority.

#### **The Schedule**

A candidate's daily activity is not unplanned and spontaneous; it should reflect a plan to use the candidate's time to get votes. Each day's activities should be part of a weekly, monthly, or phased pattern. Proportions of the candidate's time should be allocated to different types of events and ,different areas, and to satisfy well-defined goals of raising money. Each week, day and-hour must count, and every activity and item on the schedule should be there for a reason.

The scheduler is the one person responsible for scheduling appearances, preparing the

schedule and ensuring that appropriate follow-up is done. **All requests for the candidate's time must go through the scheduler**, including requests for personal time by the candidate or her/his family. At the start of the campaign, the candidate should inform the scheduler of any personal or family obligations which *must* be provided for in the schedule. The candidate should also decide at what point s/he will take a leave of absence or vacation from work. Ideally the candidate will be available to campaign fulltime for the last two months before the election.

Scheduling decisions are made by the scheduler, usually in consultation with the campaign manager. **The candidate *never* accepts an invitation her/himself.** His/her response always should be to express thanks and that s/he will check with the office to see if it can be fit into the schedule.

The office manager should provide the scheduler with the calendar of campaign events which necessitate a candidate appearance (coffees, fundraisers, workers' rallies, etc.). The scheduler's job is to find additional activities and events that will provide opportunities for the candidate to be seen or heard by large numbers of voters, raise money, recruit volunteers, get free publicity, or establish relationships with important constituency groups.

The ideal scheduler has lots of contacts in the community. Additionally, s/he will research local newspapers and church bulletins, and contact community organizations, block clubs, chambers of commerce, local schools, issue advocacy organizations, governmental offices, your own campaign volunteers, and candidates for other offices in your area to get maximum exposure for the candidate.

After the decision has been made to attend an event, the scheduler must call and verify appearance. When s/he decides not to send the candidate to an event to which the candidate was invited, a letter should be sent *promptly* expressing regrets that scheduling conflicts prevented the candidate from attending.

The scheduler will prepare a daily schedule including times, addresses, contact person, phone numbers and other information the candidate may need. A copy of the schedule should be given to the office manager to add names to the master file and to send thank you notes to the individuals or groups sponsoring the events.

When the Scheduler calls to confirm the candidate's attendance, s/he should confirm whether the candidate will have an opportunity to speak and for how long, and if literature may be distributed. A letter then should be mailed or faxed confirming the candidate's attendance and that the candidate will speak for a given time and/or that permission has been given for literature distribution. Although the campaign's goal is to maximize candidate visibility at every event, NEVER distribute literature or engage in campaign activities at other people's events if the request to do so has been denied.

Create a database or spreadsheet to track information for each event:

- Event name

- Name of host or sponsoring organization
- Name of contact at event
- Date, Time (start and end), Location
- What time candidate will appear and depart
- Length of time, if any, that candidate has to speak
- What media, if any, will be present
- Whether or not literature may be passed
- Name of candidate's driver, volunteers who will accompany candidate
- When thank-you note is sent

### **Advance Work**

An important part of ensuring that the schedule is kept and followed is what is called “advance” work. Although advance work in national or high-profile campaigns generally consists of setting up events and media coverage, in a local grass-roots campaign, it usually refers to the people responsible for getting the candidate to events and ensuring the candidate's time is used well. In addition to ensuring that there are campaign materials available at each event (when allowed), the advance person should

- **get the candidate to each event ON TIME!**
- know which people the candidate needs to speak to and make sure they have access to the candidate
- keep the candidate moving and make sure s/he doesn't stay too long talking to the same person or mingling at one event
- get the names and contact info of potential volunteers (always carry lots of Volunteer Cards!)

### Discussion Questions

1. Why is a scheduler so important?
2. Why is it important to start early?
3. What/Who is the committee composed of?