



VoteRunLead  
VoteRunLead.org

# *The Campaign Plan Timeline*

A 3-Part Campaign Plan Workbook



## { Introduction }

Ok. So you've made the decision to run. You know what you want to run for. Now it's time to get serious.

The Campaign Plan Timeline, broken up in three parts, will help you to think about the "big picture." Lots of details will go into your plan, but this will help you organize what it takes to run a campaign.

Our motto is, "**Plan the Work. Work the Plan.**" Whether it's 5 years or 5 months (or even 5 weeks), this timeline will help you create a great campaign plan. Remember. If it's not written down, it's not a plan.

# { What's in this workbook }

## Part 1: Understand the Game

1. Form Your Kitchen Cabinet
2. Assess the Lay of the Land
3. Make It Official

## Part 2: Plan the Work

1. Your Campaign Team
2. The Plans within the Plans  
(Budgets, Messaging and Voter Contact aka "Field" Plans)
3. Lists, list and more lists!

## Part 3: Work the Plan

1. Being The Candidate  
Your Role: Fundraising and Contacting Voters
2. Communicate
3. Get-Out-The-Vote

Work backwards. If you've planned a big event like a gala for work, an anniversary party, or you've mapped your own personal goals then this is something you can do. Yes, it will feel overwhelming at times - lots of dates to remember! - but that is what your local clerk's office or board of elections is for and why you pull together a great team around you!

# { Understanding the Game }



## 1. Form Your Kitchen Cabinet:

Look for people who bring different strengths to the table. This includes:

- ✓ political guidance
- ✓ stature in the community
- ✓ can help you raise money
- ✓ family support
- ✓ diverse connections
- ✓ honesty, straight-talk feedback
- ✓ confidential and trustworthy
- ✓ Writing
- ✓ social media savvy
- ✓ positive energy
- ✓ has run a campaign / been a campaign treasurer before

# { Understand the Game }

## 2. Lay of the Land

The more you understand the community you seek to represent, the better you will be able to serve them; often called “the lay of the land” or the “political landscape.” We’ve mapped six buckets to understand your political landscape.

Your “Lay of the Land Worksheet” is on the next pages.

# { Understand the Game }

## 2. Lay of the Land

### Money and Vote Numbers

In many states, the party you belong to or the legislative caucus or the previous campaign will have this data. You might have to hound them for it. But it's key.

#### Find out:

- The voter turnout percentage in the last few election for big-ticket races like the Presidential as well as local races.
- How much was spent by each candidate in the last election. This will help you determine your budget.
- How many votes the winner and the loser received.
- How many people are registered to vote in your district?

Ideally, you need to get to a "WIN NUMBER." Quite simply, this means the number of votes you need to win!

We love this

[Win Calculator from Wellstone Action.](#)

### Information About You

Get someone (not you!) to help you with this part. Take an inventory of your networks and connections:

#### Find out:

- What's out there about you? Yes, google yourself, but only to find discrepancies. Don't get hung up on not-so-great photos of you. You are human. People want to vote for real people!
- Will you take national or outside money?
- The endorsements you really want. What endorsements wouldn't you want?
- Self-assess, don't self-obsess

# { Understand the Game }

## 2. Lay of the Land

### Political/Cultural Information

Any campaign is a part of a larger community and political culture. Know what can influence voters outside of your race.

#### Find out:

- Other issues or ballot initiatives that could increase voter turnout.
- What and who else will be on the ballot. Will they be running an active or passive campaign? Do they have opponents?
- The big-ticket races that might affect your race.
- The national issues that will come into play in your race.
- What's controversial to your community and what could get controversial.

### Important Dates and Event

This is critical for you personally and for the community writ large.

#### Ask yourself:

- What are non-negotiable dates: Your mothers' 70<sup>th</sup> birthday party, school plays or a wedding anniversary? Put those on the calendar and hold them sacred.
- Next, map out what happens in your community – state fairs, parades, annual events, a local conference, etc. that you need to attend as the candidate.
- Finally, add important election filing dates and create placeholders for fundraising goals.

# { Understand the Game }

## 2. Lay of the Land

### Movers and Shakers

How can people you know help with their influence, networks and ties in the community? Are there people you need to reach out to and start new relationships?

#### Find out:

- What leaders – heads of organizations or coalitions, big donors, or vocal news media – will support you or not support you.
- What leaders do you need to get to know better and who need to know you!
- The key players responsible for turning out the vote in the various communities within your district.

### Opposition Research

You don't need to know everything about your opponent right away, but you should have a handle on your opponent(s) viewpoints and history, and continue to keep an eye on them. "Opposition research" may feel yucky but it is important to seize opportunities that set you apart from the pack and show voters why you are the better choice. You don't have to play dirty but you do need to give the voters a clear choice between you and the other guys!

#### Find out:

- You opponent's key points. List how you contrast with your opponent.
- Where you agree with your opponent and how can you showcase your expertise or perspective on the issue in a unique way.
- Call out misinformation. Find discrepancies. Take notice of the formal associations your opponent has and how they may differ from his campaign rhetoric.

# { Understand the Game }

## 3. Make it Official

There is a kind of coming out when you are ready to run. Be prepared. You've spoken with your friends and family. The next step is to be in touch with other influencers who need to know that you are running. Finally, you need to file your candidacy with your local clerk's office often found in the elections division of local government. Make sure you know the official requirements and key deadlines.



# { Plan the Work }



## 1. Your Campaign Team:

First and foremost, you (and only you!) are the candidate. Your job is to do the things only a candidate can do. For great tips on the candidate's dos and don'ts, see [Candidate Job Description](#), but most basically, your job is to raise money and to be in touch with voters. We understand that not every campaign can afford to hire full-time staff, but most candidates require some part-time help to keep them on track (and sane!). With your kitchen cabinet, discuss what functions of the campaign need to be staff by real people. You may also have "one-time" needs such as setting up your website (paid) but then have a volunteer make changes and updates to it (free).

- ✓ Take a look at Building Your Campaign Team for a full outline of the functions of each member and what they should be doing for you.

# { Plan the Work }

## 2. The Plans within the Plans

(Fundraising, Budgets, Messaging , Field, Calendar)

### a. Fundraising

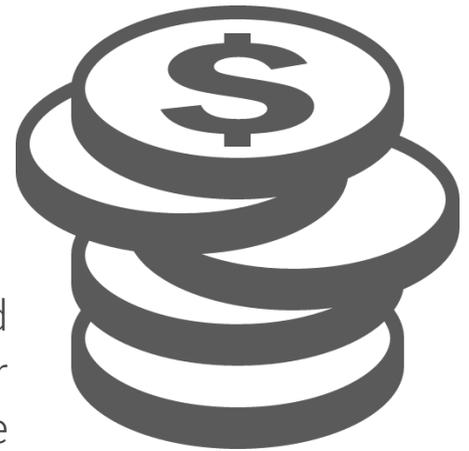
Find resources in the [Fundraising section](#) of Go Run. For now, when it's comes to the plan within the plan, the fundraising plan is your guiding light.

*You simply can't spend what you can't raise.*

When you are mapping your resources and potential fundraising amounts, it's good to consider the highs and lows. Give yourself a range, but be realistic. We like to call this making a Cadillac Budget, a Pinto Budget, and Reality Budget. Do this exercise early enough to help you make the hard choices about where to stop spending if you campaign is coming up short, or where to start spending if you are on a fundraising roll.

Start by finding out what was spent on previous campaigns. Get trained on asking for money if you are uncomfortable with asking for yourself. Find a good treasurer for you campaign with budgetary skills and make sure it's someone you trust. Understand filing deadlines and campaign finance laws (and ask questions when you don't).

Any good fundraising plan has goals aligned with key dates and has a name (or PAC) next to every dollar amount!



▶ Fundraising 101 Web Clinic

# { Plan the Work }

## b. Budget:

The almighty budget it like any other budget in your life: it's a tool. But in politics, it is also a record-keeper to ensure that folks are spending the money they raise in campaign in all the right ways. Good budgeting is not only essentially for making choices about where to spend your hard earned money, but also required for filing deadlines and reporting in to your local board of elections.



### **BE REALISTIC**

The budget is a living breathing tool. Set forecasts monthly and be sure to capture all of the things you want to spend money on!

## c. Messaging



Learn how to craft your stump speech with our VRL Live Webinar replay [here](#).

If you are finally getting tired of “staying on message,” then you are finally just getting to the voters. It takes a lot to break through the noise, especially with social media and advertisements everywhere we turn. But you can do it by staying consistent. The message is central to your campaign and should convey why you are running (luckily we've got a worksheet to help you through that.) You communications plan is also where you map out your earned and paid media. Earned media is just what is sounds like: you are not paying for this, you are getting this media coverage free because you are in the right place at the right time or because your social media strategies are rocking! Here is where you outline how you are going to get to Editorial Boards, key reporters and have others speaking on your behalf.

Paid media is the type of media you are spending your campaign money on. It could be targeted social media buys, ads in the local paper, or other

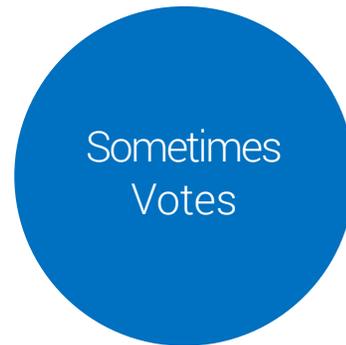
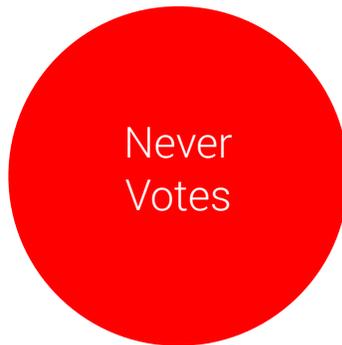
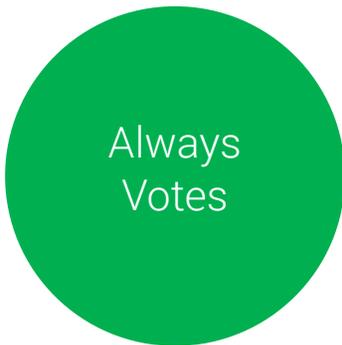
# { Plan the Work }

## d. Field – Vote Number or “Win” Number

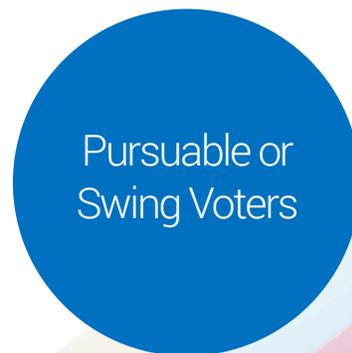
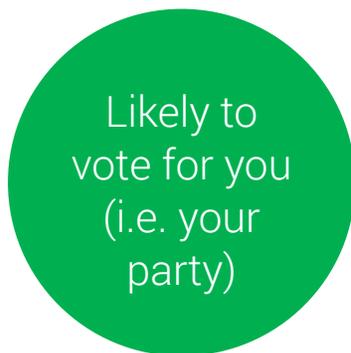
Getting to your win number (the actual number of votes you need to win your election) is part math, part gut. **It takes 50% of the Vote plus 1 to win an election** (a simple majority) but your campaigns vote number will be higher than that to account for any unforeseen changes.

What you are calculating is the following

Voters performance in three categories:



Crossed with voters likelihood of voting for you:



# { Plan the Work }

Here's a quick table to demonstrate

	Likely to Vote FOR YOU	Persuadable or Swing Voters	Likely to Vote FOR YOUR OPPONENT
Always Votes			
Sometimes Votes			
Never Votes			

In the box above, start jotting down who may fit into these boxes.

Do you have a strong policy for seniors in your community but are not of the same part of influential senior citizens in your community? You would put them in the "Always Vote / Swing Voters" Box.

Are you a young person running for the first time, speak strongly to youth issues and share the same party as many young people in your district? You would put them in the "Sometimes Vote / Likely to Vote FOR YOU" box.

Get it?! It's a judgment call based on the votes from the last elections, how inspiring or "hot" this election is (voter Turnout is always higher in Presidential elections years!) and a little bit of gut.

## { Plan the Work }

Next, overlay where you are going to spend your time.

If you have a long ways to go – say you are two years out – you might want to consider spending time on people who “Never Vote” by trying to register new voters or increasing their participation. For example, if there is low voter turnout in a community and you know that this group will vote for you if they get registered, then you might want to spend that time on registering that group and getting them from Never Vote to Sometimes Vote.



If you don't have that kind of time, spend it on the Persuadable Voters in the “Always Vote” and “Sometimes Vote” box, while making sure that your “Likely to Vote for You” folks in “Always Vote and Sometimes Vote” Feel some love. Yep, we are saying spend a majority of your time in the middle category, while giving love to your likely voters (but not too much time).

This is often harder for women. We want folks to like us, even if they are  
go-  
ing  
to

# { Plan the Work }

	Likely to Vote FOR YOU	Persuadable or Swing Voters	Likely to Vote FOR YOUR OPPONENT
Always Vote	Give 'em love but not too much	Yes, go get 'em!	Can you swing 'em? That's a gut
Sometimes Vote	Yes, go get 'em to turn out for you!	Spend time here! Lots of it	Your call.
Never Vote	Is there something in the election that will get them out? Then capitalize on it!	Your call.	Do not spend time here!

Your “Win” Number is the basis for your Voter Contact Plan a.k.a. Field Plan. This foundation tells you where you should be spending your time, what voters are likely to vote for you.

We love this handy-dandy tool from Wellstone Action called the [“Win Calculator”](#)

# { Plan the Work }

## e. The Master Calendar



Work backwards from Election Day and take it week-by-week. You've already populated the calendar with important dates for you personally, the community and the election cycle. Now, take a moment align your strategy with you've mapped for raising funds and reaching votes – often called “Candidate Time” or “Candidate Schedule”. Put those milestones on the calendar! For example, you may want to hit a certain fundraising goal before the first filing deadline in order to show potential opponents the strength of your support. Another example is if you have early voting in your state. Be sure to include how many voters you

potential opponents the strength of your support. Another example is if you have early voting in your state. Be sure to include how many voters you

# { Plan the Work }

## 3. Lists, list and more lists!

Good lists win elections. Your “Voter Contact List” (what, closer to Election Day, becomes your “Get Out the Vote (GOTV) List”) is the base of your campaign, your “Fundraising List” funds the campaign plan, and your “Press List” gets you wider visibility. Whether it is voters, fundraising contacts or media connections, keeping good records will foster relationships with supporters and donors, and get you more media coverage.

Your campaign is only as good as the lists you keep – to know who and where your supporters are, who you’ve contacted and who needs to be contacted, and where your funding is coming from – so be sure to keep your data clean and organized!

### **Voter Contact List:**

You could just walk out your front door and start visiting every house in your neighborhood and district, but is that the most efficient way to reach your Win Number? Getting a list of registered voters (including names, addresses and phone numbers) is key to implementing your campaign plan.

There are a number of resources for voter lists. The most basic list is available from your local election administrator or your Secretary of State. Depending on which office you’re running for, this list – kept in a simple Excel spreadsheet – may be all you need. However, it’s usually better to get an enhanced voter file that comes with a software package to manage the data.

Enhanced voter files layer in additional information about specific voters, such as age, race/ethnicity, political party preference, how often they vote and in which elections, sometimes even consumer data. These files usually come as part of a software package that allows you to layer in your own data, such as identified supporters, donors, volunteers, yard sign takers, etc.

Your political party may have an enhanced voter file software package available to you for free or for a nominal fee. There are also many vendors who provide various packages of enhanced voter files and software support. Do your research to find a voter contact list that works best for your campaign plans and budget.

# { Plan the Work }

## Fundraising List:

In most cases, campaign finance laws require your campaign to file specific reports about your donors. Detailed recordkeeping from the start of your campaign will make your reporting easier. A good fundraising list also helps to identify current and potential donors, track contribution pledges, send thank you notes, re-ask previous donors, and know who has already reached their contribution limit.

Like the voter contact list, the most basic fundraising list is your own spreadsheet of people you personally know and want to ask for donations to your campaign. You can also buy fundraising software from vendors, which may include lists of potential donors in your district. If you are working with a professional fundraiser, they may come with their own list to add to your personal list.

## Media List:

It is important to know all of the ways that voters consume media in your district, and to get to know specific reporters, journalists and bloggers. Work with your campaign team to develop a media contact list specific to your race. Who is the reporter assigned to local election coverage? Who is on the editorial board of your local newspapers? Which blogger helps shape opinions about local policies and government actions?

Start building relationships with media early in your campaign, and track your contact with them. Reach out and touch media often, offer yourself as a resource on specific topics, help identify good stories to follow. Track who covers your campaign and when.

# { Work the Plan }



## 1. Continue being the Candidate: Fundraising & Contacting Voters

### Calendar Check.

Staying on track is key. Bring the campaign plan back out if you and your team have gotten distracted. Look back at the last few weeks, have been spending the majority of your time raising money and contacting voters? If not, look ahead and make changes to your schedule to reprioritize these two things.

### Check in with yourself.

Provide enough time in the Candidate Schedule to make sure you are getting rest, eating well and sleeping. The final days of the campaign are going to be the most time consuming and you want to make sure you are healthy!

### Check in with your team.

Is everyone ready for the final stretch and have what they need to make it happen? Take feedback from your team, but keep your adjustments in line with your goals of raising money and talking to voters.

# { Work the Plan }

## 2. Communicate



You can only get to so many voters in one day. Use your other modes of communication to help put your message in front of voters.

**Start really leveraging your social media and email list.** Make sure your messages are consistent across your platforms. Check to see if your emails are getting a decent open rate, if not make an adjustment. Make sure your message on social media are matching your e-communication in tenor and tone, but don't bombard people with the same messages one very platform.

**Push out your press releases and engage your reporter contacts** to get earned media on your latest fundraising numbers, an upcoming debate, or a recent endorsement of your campaign.

**Through your Ambassadors**, prepare them with talking points so they can chat you up to key influencers and possibly secure more endorsements for you.

**Prepare your volunteers** with talking points and lists of telephone numbers for phone banking and "walk scripts" for door-knocking so surrogates can get to more houses and reach more voters! Managing volunteers is the job of the campaign manager but you should know where your people are. If you are managing your own volunteers, it pays to put the time beforehand to get volunteers fully prepared for what you are asking them to do.

Of course, **get your lawn signs and literature out there.** But don't worry too much about the lawn sign competition. Lawn signs don't vote!

You know who does vote? People.  
Which takes us to the most critical part of the campaign:

# { Work the Plan }

## 3. Get Out The Vote!

Getting out the vote is turning out voters to the polls on Election Day. There are several ways that people can vote, whether it's in person on Election Day, part of Early Voting that happens in several takes a few weeks before the final Election Day, Absentee Ballots, and Vote by Mail. Using your vote or "Win" number, your campaign will have a good handle on who votes when in your community. In the final weeks and days leading up to campaign you and your team will make decisions about what tactics to use on what group. Remember, you are spending a majority of your time on Persuadable or Swing Voters, giving love but not time to Likely Voters who are For You and spending no time on folks that don't vote or won't vote for you in these final days.

Check out our webinar replays to learn best practices to get out the vote!

GOTV Planning: Turn  
it up to turn it out!

Voter Registration  
& Mobilization

## { What's Next }

1. Check out our Fall web clinic schedule. We put on at least one clinic every week on Thursdays at 2pm EDT. We cover an array of topics from fundraising, campaigning, communications, and facts about the offices.

[2015 Fall Web Clinics Schedule](#)

2. Take a look at our webinar replays to see if we've had a session in the past that you want to watch. Most of them come with companion resources like a copy of the presentation or a worksheet to help you get started.

[VRL Live Webinar Replays](#)

3. We also offer a huge resource library so you can learn at your own pace. Sign in and you can see what we have to offer in our "Learn" section.

[Resource Library](#)

4. Finally, share this resource with others and tap the great women in your life to encourage her to run for office. Send them our way and we'll teach them how to run for office.

[f Share on Facebook](#)

[t Share on Facebook](#)

We look forward to seeing what's next on your leadership journey!