



THE CAMPAIGN PLAN: YOUR ROADMAP TO SUCCESS

The first and most important step in launching a successful campaign is writing your campaign plan. The plan is a detailed, comprehensive and informed outline of your entire campaign operation that takes you from the announcement of your candidacy to your victory on Election Day. You will not succeed without one.

Why plan? Without a written outline of your objectives and a detailed plan to get there, you are very likely to lose focus, become sidetracked by crises and spend your time performing non-essential tasks better suited to your staff. In addition, you have no official means to measure your success and make necessary adjustments throughout the course of the campaign – a mistake that can spell disaster for any aspiring candidate.

There are no shortcuts to developing a plan. You should allow and devote ample time to quantify your resources, assess your needs and make important decisions about all aspects of your campaign, including targeting, message, voter contact, scheduling, staffing, budgeting and fundraising. Above all, it is imperative that you remember the cardinal rule of campaigning: **If you fail to plan, you are planning to fail.**

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The plan should encompass all of the following:

Timeline: Working backward from the election, what is your timeline for meeting your goals? When will you hold key events, and what monthly benchmarks will you set for yourself and the campaign? Include key dates, such as the candidate filing deadline, when financial reports are due, and large visibility events in the District you will need to attend and prepare for.

Budget: How much will it cost to win this race? How will that money be spent? Your budget should reflect the goals of your campaign, and you should plan to allocate the majority of your total resources to voter contact and (in some cases) paid media. Develop a low, medium, and high budget to determine your essential expenditures, and detail your budget by month so you have a handle on cash flow. Be sure to account for all expected costs, including staff salaries and consultant fees; rent, office equipment and supplies; printing and postage; earned and paid media expenses; telemarketing and direct mail; research; technology; and costs associated with fundraising.

Message: What message will guide your campaign? Your message is the central guiding theme of your campaign – one that conveys the reason you are running and



what you will do to improve the lives of those in your community once elected. It should be relevant to the issues in your District, it should set you apart from your opponent, and it should make clear the values you stand for and what you will fight for once in office. Your message should frame -- and be used repeatedly throughout -- all of your voter communication, including speeches, debates, written materials, media appearances, and fundraising appeals. If you're getting tired of saying it, it's probably only just beginning to break through to your voters.

Vote Goal: Get a handle on the political math of your District, including the number of registered voters, Party registration split, recent Party performance, turnout in the last election, and the current incumbent's margin of victory. Use this information to help answer the most important question of your campaign: How many votes will you need to win? Using the voter file and available campaign ID's, you will need to determine the "base" voters most likely to support you and to vote; the "swing" voters you will target with your message; and your opponent's base voters, whom you should waste no time or resources to contact. Your vote goal and its corresponding targeted voter universe should guide all of your campaign efforts.

Voter Contact: How will you reach and communicate with your targeted universe of voters? Determine how many doors you need to knock on over the entirety of the campaign (and specifically, how many you need to knock on each day), which universe of voters will you mail to and how often, and if you will utilize paid or volunteer phone banks for persuasion. An emphasis on direct voter contact should be the driving force behind your plan, your schedule, your budget and the timeline of your entire campaign.

Earned Media: What are the print, radio, television, and specialty news media outlets that cover your District? Create a comprehensive media list early, determine a key list of reporters and media outlets with whom you will develop relationships, and compile a smart media packet that can be shared with reporters. When developing a comprehensive plan for generating media for your campaign, don't overlook the need for surrogates to speak, write letters to the editor, and call talk radio on your behalf; to incorporate a system for rapid response so you are prepared to take advantage of every opportunity to move your message and create a contrast with your opponent; and to reach out to specialty news outlets that serve particular communities within your District. Be sure to also include editorial board meetings and participation in/preparation for debates in your plan.

Fundraising: Based on your budget, how much money do you need to raise to wage a winning campaign? How will you raise that money? As the candidate, you should set daily, weekly and monthly goals for your fundraising calls, and plan to spend several hours per day on the phone. Develop a system for culling lists of, contacting, tracking the commitments of, following up with, and thanking donors. Outline your goals for direct mail, large events, house parties, website contributions, high-dollar donors, and PAC contributions and set goals for each. Develop a finance committee or team of supporters

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committed to raising a specific dollar amount for your campaign through their own networks and/or hosting house parties on your behalf.

Paid Media: Will your campaign invest in paid media? If so when, where, and with what frequency? While paid media (print, radio, or television advertising) – is not the solution for every campaign, in some races it can be a wise and necessary investment of resources. As a general rule, don't invest in paid media unless you can dominate the medium, or purchase enough time or space to break through the clutter. Above all, be strategic and informed in your use of resources, and look for guidance before making paid media decisions.

Staff and Volunteers: What staff will you hire, and how will you utilize volunteers? Assembling a team you trust and can depend upon to perform the most vital functions for your campaign is critical. As the candidate, you need to keep your time focused where it should be – on fundraising and direct voter contact. While not every campaign can afford to (or should) hire a full complement of staff, certain positions require the assistance of at least part-time staff, including but not limited to a campaign manager, a finance director, and a field director for the final two months.

Visibility: Determine what events you will attend in the District, what kind of presence you and/or your campaign will have at those events, how often and in what areas will you conduct literature drops, and how you distribute items such as bumper stickers and lawn signs, and how you will engage volunteers in these efforts. While lawn signs and bumper stickers can be a useful asset to a campaign, they don't win elections. Remember that most of your financial resources should be focused on direct voter contact.

Candidate Schedule: The campaign needs to know how much time the candidate will commit to campaign – a specific number of hours per week. The candidate should spend the vast majority of his or her time engaged in two activities: Fundraising and direct voter contact. Set daily benchmarks and goals for these activities, and stick to them. Make sure that activities that should be managed by staff and/or volunteers are not consuming your time.

Mobilization: Turning Support Into Votes. No matter how compelling your message is or how much money you raise, unless you can translate your support into votes you will not win. As such, developing a plan to get out the vote on your behalf is perhaps the most critical component of your plan. Your GOTV plan should include a detailed outline of your plan to reach your voters in the weeks leading up to the election and to turn them out to vote. And the efforts of those final weeks need to be *repeated* on Election Day. Absentee balloting; phone banking; door knocking; robo-calls; literature drops; an Election Day flushing operation, and rides to the polls are all important elements your campaign should devote resources to.

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Strategy. Your campaign needs to clearly spell out the strategies you intend to use in order to win. Your strategy should be easily conveyed to all key campaign staff or volunteers. A campaign's strategy should help the campaign decide which tactics to use – not the other way around. A measure of a strong campaign is the ability to externally communicate the strategy for victory.