

المدارس الإقليمية لتنظيم الحملات



**CAMPAIGN
SCHOOLS**

NATIONAL DEMOCRATIC INSTITUTE

Campaign Skills Trainer's Guide

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Introduction

This Training Guide has been prepared as part of NDI's Middle East and North Africa (MENA) regional campaign schools program, with the support of the U.S. State Department's Middle East Partnership Initiative (MEPI). It is designed to be used by trainers who would like to deliver content from this program to candidates, campaign managers, and political party activists from their own parties or their local communities.

The Training Guide is a set of eleven distinct training manuals with step-by-step lesson plans, training and facilitation tips, presentations, group exercises and, in some cases, handouts or worksheets. Topics covered include understanding democracy, developing leadership skills, raising and managing resources, campaigning and communicating with voters, developing policy, communicating effective messages, public speaking and preparing yourself as a candidate.

These materials have been developed to complement NDI's Campaign Skills Handbook, which covers the same topics and offers a variety of additional resource materials. The handbook can be helpful to those using this guide, but it is not essential.

How to Use These Materials

The Training Guide has been designed to offer as much flexibility as possible. The modules contained can be:

- Delivered separately and individually, one topic at a time
- Put together in whatever combination of topics is suitable and desirable
- Delivered as an entire package, as a multi-day training

Whatever configurations is chosen should be based on the needs of the trainer and participants, what each seeks to achieve, and the time and resources available.

Each module begins with a brief description of the topics covered and a list of the resources and materials the trainer will have to prepare in advance. The estimated time of the training is also included.

Because some topics require a significant time commitment, a few of the modules offer a Version A, (which is more comprehensive) and a Version B (which is more abbreviated) for some segments. Where these options exist, they are highlighted and explained at the beginning of the module so that the trainer can choose which course to take in advance.

This guide assumes that its users will have access to a flipchart, markers, tape (for posting flipchart pages) and, in some cases, the ability to make photocopies. There is no assumption that trainers will be able to use a computer and projector so all tables, graphs, lists and other visual images are designed to be recreated on flipchart paper. Again, these are outlined at the beginning of each session.

The lesson plans are organized in into five columns:

Steps	Description	Type	Min	Note to the Trainer
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The **Steps** column lists the numerical order for each step in that segment of the training: what to do first, second, third, etc.

The **Description** column provides the trainer with instructions for what to say and do. Most of this is written in regular letters, but when the content of the script a trainer delivers is extensive, it may appear in *italics* to help identify areas that will require preparation or notes.

The **Type** column indicates what type of activity is used in each segment. The key for these activities appears at the start of each module. They are:

- **TP – Trainer’s Presentation** → The trainer delivers content on a subject with limited or no interventions from participants
- **PEE – Participants’ Experiences or Exercises** → Participants fulfill assigned tasks based on their own experiences and knowledge
- **DBR – Facilitated Discussions, Brainstorming and Reflection** → The trainer facilitates a discussion or idea-collection session with participants on a particular topic
- **CLL – Conclusions and Lessons Learned** → Key learning points are summarized, either solely by the trainer or with the interaction of participants
- **ANK – Application of New Knowledge** → Participants fulfilling tasks assigned by a trainer after learning new information

The **Min** column estimates the amount of time each step or activity will take. This is calculated based on the assumption that there are 20 participants present and should be expanded or reduced depending on the actual number of participants.

The **Note to the Trainer** column contains guidance on materials the trainer will have to prepare in advance as well as additional tips and advice for implementing each step.

While the authors have sought to offer as comprehensive and user-friendly a product as possible, trainers using this guide are strongly encouraged to use their own creativity and adjust the materials to suit the circumstances and needs of their audience, as well as their own training styles.

Acknowledgements

The authors would like to acknowledge the many NDI staff and partners throughout the region who contributed content and expertise to this Campaign Skills Trainer’s Guide.

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Campaign Skills Trainer's Guide

Module 1

Political Parties and Elections

Key Institutions in a Democratic State



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 1: POLITICAL PARTIES AND ELECTIONS

Key Institutions in a Democratic State

SESSION OVERVIEW:

This module gives an overview of elections and political party work in democracies. Providing a strong foundation of general principals of democratic practices puts the subsequent skills trainings into a broader context, and allows for discussion of work that needs to be done between electoral cycles.

SECTIONS:

1. Democratic Actors
2. Best Practices for Political Parties
3. The Guiding Principles of Elections

LEARNING OBJECTIVES:

- Introducing concepts of democratic principles and practices, and the role of different actors in a democracy
- Exploring the role of political parties in a democracy
- Importance of free and fair elections in a democracy

TIME: 100 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- Triangle of Political Party Best Practices
- Internal Audit on Women's Participation
- Internal Audit on Youth Participation

PREPARATION:

Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. DEMOCRATIC ACTORS:
 - Political parties
 - Civil society
 - The media
4. 4 FUNCTIONS OF POLITICAL PARTIES:
 - Citizen Participation
 - Policy Development
 - Electoral Competition
 - Governing Institutions

5. POLITICAL PARTIES – CITIZEN PARTICIPATION:

Political parties create mechanisms and means for **individual citizens to become directly involved** in how a country is governed and run through their campaign structures during elections and outreach efforts outside of elections.

6. POLITICAL PARTIES – POLICY DEVELOPMENT:

Political parties are **factories of ideas, policies and plans** for how the country should be run and how challenges facing the country should be addressed.

7. POLITICAL PARTIES – ELECTORAL COMPETITION:

Political parties provide a means to **compete peacefully for political power** through elections, both by accepting the responsibility of governance when they have won an election and by respecting the choice of the voters when they have lost.

8. POLITICAL PARTIES – GOVERNING INSTITUTIONS:

Political parties promote **healthy governing institutions** by working to deliver results for the people and run effective agencies and departments when in government; they also advance higher levels of accountability by the scrutiny they provide when in opposition.

9. CIVIL SOCIETY ORGANIZATIONS:

- community groups
- trade and labor unions
- non-governmental organizations, issue-based groups
- charitable organizations
- faith-based organizations
- professional associations

10. ROLES OF CIVIL SOCIETY ORGANIZATIONS:

- Express the interests of its members
- Raise awareness of key issues
- Influence policy (advocate and mobilize)
- Provide evidence and knowledge for the development of policy and legislation

11. DIFFERENCES BETWEEN POLITICAL PARTIES AND CSO's:

- Engagement in the political process
- Range of specific issue areas they focus on
- Participation in government
- Independent vs. associated

12. ROLES OF THE MEDIA:

- Facilitate and host discussions
- Inform
- Mediate
- Create awareness

13. Characteristics of a high-functioning political party:

- Clearly defined roles, responsibilities, rights and powers at all levels
- Clear and transparent decision-making processes
- Regular and accessible communications, internal and external

14. To play a critical role in building a democracy, political parties must be democratic themselves. If parties do not practice and honor democratic values internally, they are less likely to do so when they are contesting elections and governing.

15. GUIDING PRINCIPLES OF ELECTIONS:

- REPRESENTATION
- TRANSPARENCY
- INCLUSIVENESS

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – Democratic Actors – 40'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review the learning objectives.	TP	1	
2	<p>Open the session by asking participants to define what a democracy is. Write some of their answers on the flip chart. Accept all opinions, but look for concepts such as free and fair elections, government held accountable to the people, balance of power, and/or the rule of law.</p> <p>This brief brainstorm will allow you to segue into a discussion of democratic actors. Explain that: <i>In a healthy democratic society, a number of actors play vital roles in a country's social, economic and governing systems, and shape the manner in which policy is made and how the government conducts itself. Several of these serve as conduits and systems of organization for the ideas and opinions of individual citizens.</i></p> <p><i>This section explores the functions and influence of a number of these non-state actors, including:</i></p> <ul style="list-style-type: none"> - Political parties - Civil society - The media <p><i>These various sectors play critical roles in democratic systems, developing ideas, providing information, delivering services and shaping public policy. The relationship among these actors is dynamic and can be defined by both tension and codependence at the same time. Each makes a qualitative difference in the functioning of the other organizations even when there is a conflict of ideas about how the country should be run.</i></p>	TP	2	<p>Democratic non-state actors:</p> <div> <p>DEMOCRATIC ACTORS:</p> <ul style="list-style-type: none"> - Political parties - Civil society - The media </div>

Steps	Description	Type	Min	Note to the Trainer
3	<p>Explain that the discussion on democratic actors will start by focusing on political parties.</p> <p>Introduce the four primary functions of political parties:</p> <ol style="list-style-type: none"> 1. Citizen Participation 2. Policy Development 3. Electoral Competition 4. Governing Institutions <p>Invite participants to think about what each of these functions are and how political parties can fulfill each of them.</p>	TP	1	<p>Political parties serve 4 primary functions in democratic societies:</p> <div> <p>4 FUNCTIONS OF POLITICAL PARTIES</p> <ol style="list-style-type: none"> 1. Citizen Participation 2. Policy Development 3. Electoral Competition 4. Governing Institutions </div>
4	<p>Ask the participants how political parties play a role in “Citizen Participation”. Have the description written on the flipchart in advance and, after a few contributions from the participants, offer it as a summary.</p> <p>Discuss the summary you have offered and ask participants to name different ways political parties engage citizens. Write their answers on the flipchart. Accept all reasonable answers and ensure that the followings ways are mentioned as well:</p> <ul style="list-style-type: none"> • <i>Recruiting new members</i> • <i>Training members in political skills</i> • <i>Encouraging participation in election campaigns</i> • <i>Encouraging participation in policy development</i> • <i>Building strong party branches and internal structures</i> • <i>Meeting and communicating regularly with members and voters</i> • <i>Creating mechanisms to collect the opinion of voters and members, such as survey canvasses and community meetings</i> 	DBR	3	<div> <p><u>POLITICAL PARTIES – CITIZEN PARTICIPATION:</u></p> <p>Political parties create mechanisms and means for individual citizens to become directly involved in how a country is governed and run through their campaign structures during elections and outreach efforts outside of elections.</p> </div>

Steps	Description	Type	Min	Note to the Trainer
4	<p>Point out that:</p> <p><i>The value of these very simple activities should not be underestimated. Each of these activities helps political parties communicate more effectively with voters, and builds a stronger and healthier political system. The more that citizens feel involved, engaged and represented, the more stable and effective a country's systems of governance will be.</i></p>	DBR	3	
5	<p>Move on to the topic of "Policy Development." Describe the role political parties play in this area by offering the following description on the flipchart:</p> <p><i>Political parties are factories of ideas, policies and plans for how the country should be run and how challenges facing the country should be addressed.</i></p> <p>Once you have reviewed this description, ask participants to share a few examples of how this has been done within their own parties. Briefly discuss these.</p>	TP + PEE	5	<p>Write the following on the flipchart in advance:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><u>POLITICAL PARTIES – POLICY DEVELOPMENT:</u></p> <p>Political parties are factories of ideas, policies and plans for how the country should be run and how challenges facing the country should be addressed.</p> </div> <p>If participants struggle to come up with examples of policy development within their parties, ask them what the primary issue was that the party ran on in the last election and how the party came up with its policy on this issue.</p> <p>If you are doing this session as the beginning of a longer course which will include the session on "Issue Identification and Policy Development", you can tell participants they will learn more about what it takes to develop successful policies in that session.</p>

Steps	Description	Type	Min	Note to the Trainer
6	<p>The next area is “Electoral Competition”, the most obvious one. Share the content written on the flipchart in advance and ask the participants to list some of the things parties do to fulfill this function. Ensure that the following are mentioned:</p> <ul style="list-style-type: none"> • <i>Promote the policies they have developed as solutions to problems, in the context of their overall message</i> • <i>Offer sound candidate choices</i> • <i>Engage in a healthy public debate</i> • <i>Create opportunities for individual citizens to get involved</i> • Abide by the outcome of these contests • <i>Play a role in leading debate on the electoral system setting the rules for competition and ensuring the integrity of the voting process</i> • <i>Help to ensure that elections are true expressions of the will of the people</i> 	TP	5	<div> <p><u>POLITICAL PARTIES – ELECTORAL COMPETITION:</u></p> <p>Political parties provide a means to compete peacefully for political power through elections, first by campaigning vigorously, fairly and non-violently, then by accepting the responsibility of governance when they have won an election and by respecting the choice of the voters when they have lost.</p> </div>

Steps	Description	Type	Min	Note to the Trainer
7	<p>Move to a discussion of “Governing Institutions” by sharing the description written on the flipchart and adding:</p> <p><i>When a party wins an election, they must take on the exciting and extremely challenging task of governing. This means running the affairs of the country, further developing policy for implementation, overseeing the conduct and performance of government departments and agencies, taking responsibility for how money is spent, and delivering on promises made during the electoral campaign.</i></p> <p><i>How well a party is developed as an organization and institution will impact its readiness to take on the responsibility of running a country effectively.</i></p> <p><i>However, it is not just the victorious parties that play a key role after an election. The parties that did not enter government now become the opposition which, when well-organized, makes a critical contribution to the accountability of government institutions:</i></p> <ul style="list-style-type: none"> • <i>Opposition parties have both a direct interest and a responsibility to monitor the actions and check the power of ruling parties, including putting forward viable policy alternatives that challenge those put forward by the government and provide citizens with both a contrast and a choice.</i> • <i>At times, rather than countering the government, the opposition may work constructively with it to find compromises and better solutions to pressing problems.</i> <p>Ask participants if they have any other thoughts or opinions about the functions of political parties in a democratic system. Then explain that you are moving to the next democratic actor in this system, civil society.</p>	TP	3	<p><u>POLITICAL PARTIES – GOVERNING INSTITUTIONS:</u></p> <p>Political parties promote healthy governing institutions by working to deliver results for the people and run effective agencies and departments when in government; they also advance higher levels of accountability by the scrutiny they provide when in the opposition.</p>

Steps	Description	Type	Min	Note to the Trainer
8	<p>Introduce and review the role of civil society:</p> <p><i>Civil society refers to all groups outside government such as community groups, trade and labor unions, non-governmental organizations, issue-based groups, charitable organizations, faith-based organizations, and professional associations. Civil society expresses the interests of social groups and raises awareness of key issues in order to influence policy and decision-making. In recent decades, civil society organizations (CSOs) have been successful in shaping global policy through advocacy campaigns and mobilization of people and resources.</i></p> <p><i>The increasing global trend toward democratization has opened up the political space for CSOs to play a more active role in influencing policy. Additionally, because they are frontline organizations with first-hand experience of the impact of a policy or a problem on the ground, CSOs often have information that government or political party experts do not. In this way, CSOs provide critical evidence and knowledge to the development of policy and legislation, which means that these are more likely to be effective when implemented.</i></p> <p><i>Some of the key distinctions between political parties and civil society organizations are:</i></p>	TP	5	<p>Prepare the following flipcharts in advance:</p> <p>Civil society refers to:</p> <div> <p><u>CIVIL SOCIETY ORGANIZATIONS:</u></p> <ul style="list-style-type: none"> - community groups - trade and labor unions - non-governmental organizations, issue-based groups - charitable organizations - faith-based organizations - professional associations </div> <p>Roles of civil society organizations are:</p> <div> <p><u>ROLES OF CIVIL SOCIETY ORGANIZATIONS:</u></p> <ul style="list-style-type: none"> - Express the interests of their members - Raise awareness of key issues - Influence policy (advocate and mobilize) - Provide evidence for the development of policy and legislation </div>

Steps	Description	Type	Min	Note to the Trainer
8	<ul style="list-style-type: none"> • Civil society organizations may choose whether or not they engage with the political process. Some CSOs choose not to get involved; others actively try to influence the political and public agenda. Regardless, CSOs should not be excluded from politics. • Civil society organizations are more likely to concentrate on a focused range of specific issues. Political parties are obliged to deal with all issues that have an impact on society. • Political parties aspire to participate in government unlike CSOs, whose purpose is to advocate from outside to see their agenda fulfilled. • Civil society organizations can be both non-partisan and multi-partisan. When CSOs are independent, they are able to discuss and negotiate with all political parties for support for their agenda, as well as to criticize parties in the context of their programs, promises (fulfilled or unfulfilled) and actions. 	TP	5	<p>Differences between roles of political parties and CSO's are:</p> <div> <p><u>POLITICAL PARTIES AND CSO's DIFFERENCES:</u></p> <ul style="list-style-type: none"> - Engagement in the political process - Range of specific issue areas they focus on - Participation in government - Independent vs. associated </div>
9	<p>Facilitate a brief discussion with participants about civil society.</p> <p>Ask participants to think about civil society in their areas. Is there a clear distinction between political parties and civil society? Would they consider civil society strong or weak in their areas? As political activists, do they engage regularly with civil society organizations? Why or why not?</p>	DBR	5	

Steps	Description	Type	Min	Note to the Trainer
10	<p>Introduce the role of the media:</p> <p><i>In order for government to be accountable, the people must be aware of what is happening in the country. The media plays a big role in providing people with information on governmental performance, what decisions are being made that affect them, how they are being made, by whom, and why. No democracy can thrive unless citizens have the information they need to make free and informed choices.</i></p> <p><i>The media – newspapers, television, radio, billboards, Internet, social media platforms, etc. – play a critical role in providing information and a space for political dialogue in a democratic state. While media takes many different forms and has a range of audiences, there are some clear roles these outlets can play to support democratic development.</i></p> <ul style="list-style-type: none"> • A forum for discussion of important social, economic and political questions facing a society; • A source of information on which citizens can base the decisions they make about these questions and issues; • A mediator between citizens and their elected representatives which provides both with platforms to express concerns, actions and positions on issues of common concern; and, • A tool to create awareness among a diverse and geographically dispersed society. 	TP	5	<p>Prepare the following on the flipchart in advance:</p> <p>The roles of the media are:</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><u>ROLES OF THE MEDIA:</u></p> <ul style="list-style-type: none"> - Facilitate and host discussions - Inform - Mediate - Create awareness </div>

Steps	Description	Type	Min	Note to the Trainer
10	<i>The degree to which media outlets are wholly independent – i.e., not controlled or used as a mechanism for political or individual agendas – can have a big impact on the quality of the political engagement in a country. The emergence of more autonomous channels, such as video uploads sites on the internet, individual blogs, and social media forums, has created important mechanisms to challenge biased media where it exists. But private, political agendas can still limit the vital information that citizens need to make informed choices in many democracies.</i>	TP	5	
11	Ask the participants to consider the description of the role of the media in a democratic society that you have just offered. How would they rate the country's media according to these criteria? Discuss which currently has more influence: traditional media outlets such as television and newspapers, or newer platforms such as online blogs, social media forums, and video upload sites? Why?	DBR	5	

SECTION 2 – Best Practices for Political Parties in a Democracy – 45'

Steps	Description	Type	Min	Note to the Trainer
1	<p>To begin a discussion about best practices for political parties in a democracy, summarize the points about primary roles of political party from the beginning of the workshop, adding a few more dynamics to the description:</p> <p><i>Parties are expected to organize ideas, mobilize citizens, govern effectively, raise their own resources, communicate consistently, compete in elections, solve a multitude of societal problems and, while doing all this, consistently behave in a manner which is accountable, transparent, ethical and legal.</i></p> <p>Ask the participants what characteristics a high-functioning party has to have to meet all these expectations. Guide participants to think about how a party has to operate as an organization to fulfill these roles. Write their answers on the flipchart, and guide participants towards the following:</p> <ul style="list-style-type: none"> Clearly defined roles and responsibilities, rights and powers among all levels of the party; Clear and transparent decision-making processes and procedures inside the party; and, Regular and accessible communications, both within the party and with external audiences. <p><i>Once you have characteristics listed, invite the participants to elaborate more about each one. Why is it important? How the party can benefit from it? What can be the consequences if any of the traits are missing?</i></p>	PEE	10	<p>Characteristics of a high-functioning political party :</p> <ul style="list-style-type: none"> Clearly defined roles and responsibilities, rights and powers among all levels Clear and transparent internal decision-making processes and procedures Regular and accessible communications, both internal and external <p>To play a critical role in building a democracy, political parties must be democratic themselves. If parties do not practice and honor democratic values in their internal affairs, they are less likely to do so when they are contesting elections and governing.</p>

Steps	Description	Type	Min	Note to the Trainer
1	<p>Wrapping up the brainstorming and discussion with the following conclusion:</p> <p><i>To play a critical role in building a democracy, and especially in transitional democracies, political parties must be democratic themselves. If parties do not practice and honor democratic values in their internal affairs, they are less likely to do so when they are contesting elections and governing.</i></p>	PEE	10	
2	<p>Hand out the Triangle of Political Party Best Practices worksheet and ask the participants to use it to examine and rate their political party in three key areas: internal democracy, outreach and transparency.</p> <p>Provide participants with sufficient time to fill out the worksheet, and then debrief their findings by answering and discussing the questions listed at the bottom of the page.</p>	PEE	10	
3	<p>Remind participants that reaching out to new sectors of society is considered a best practice for effective political parties. This type of outreach often focuses on bringing women, young people, disabled people, members of ethnic minorities and other under-represented groups into the party and its leadership positions.</p> <p>Distribute the following materials:</p> <ul style="list-style-type: none"> Worksheet, Internal Audit on Women's Participation Worksheet, Internal Audit on Youth Participation <p>Instruct participants to take a few minutes to read the briefing materials on each sheet on their own, but not to answer any of the audit questions yet. When participants have finished reading, ask whether anyone has any questions or comments about the content.</p> <p>Once the information is clear, ask participants to answer the questions on each of the worksheets and prepare to discuss them.</p>	PEE + DBR	25	<p>If you are training participants from different parties, it is not required to have them report back to the larger group after they have completed the 3 internal audit worksheets as some of this information will be sensitive.</p> <p>However, if you are working with participants from the same party, facilitate an open discussion about the issues in these audits. Many will be sensitive and some will be controversial. Additionally, some participants will have very different assessments of the same situation. All of this merits as much discussion, as time will allow.</p> <p>It is also important that, as the trainer, you have fully read and understood all of the segments of the internal audit worksheets, including the briefing sections on the political participation of women and young people.</p>

SECTION 3 – The Guiding Principles of Elections – 13'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain that the final element of democratic systems we will be discussing is elections. Introduce this section with the following:</p> <p><i>An election is a decision made by voting. In political elections, the eligible population of voters makes important decisions about what should happen in their country. All of the political parties, political leaders, and authority figures in the country are expected to respect those decisions.</i></p> <p>And then introduce and explain three guiding principles of elections:</p> <ul style="list-style-type: none"> - Representation - Transparency - Inclusiveness <p>REPRESENTATION – When citizens cast their vote for a candidate, they are giving that person the right to represent their interests in government. This right is not given without responsibilities; it is given under the assumption that the individual in government will act responsibly and will to the best of his/her abilities truly represent the constituent's interest.</p> <p>TRANSPARENCY – It is important that the mechanisms of the electoral system be as transparent as possible and known to both voters and political parties and candidates well in advance in order to avoid confusion and distrust in the results they produce at elections.</p>	TP	5	<p>Prepare the following on the flipchart in advance:</p> <p>Three guiding principles of elections:</p> <div> <p><u>Guiding principles of elections:</u></p> <ul style="list-style-type: none"> - REPRESENTATION - TRANSPARENCY - INCLUSIVENESS </div>

Steps	Description	Type	Min	Note to the Trainer
1	<p>INCLUSIVENESS – The electoral system will have a greater chance of being accepted as fair and legitimate if it is considered to be inclusive of all groups in society. This means not only that the electoral law allows as many citizens as possible to vote (this includes universal suffrage, making sure that the system is easily understandable, and ensuring access for all to the polling station), but also that the mechanisms of the electoral system do not overtly discriminate against any one group in society, minority or otherwise.</p>	TP	(5)	
2	<p>Ask the participants how these guiding principles can be met and facilitate a brainstorm on what provisions have to be set by the state so these principles exist.</p> <p>Elicit the following:</p> <ul style="list-style-type: none"> • Each and every citizen of legal age has the right to participate as a voter and as a candidate no matter what his or her class, caste, tribe, gender, economic or marital status or religion; • Elections take place at regular intervals, so that people can review or change their choice of governing party; • The voting procedure gives everyone the right to a vote, maintains the secrecy of the ballot and ensures all cast ballots are accurately counted; and, • An election management body, which is recognized as neutral and free of political influence, controls the operation of elections. This may be a stand-alone commission or part of a government agency as long as it functions independently and without prejudice. Members of the body should be trustworthy members of the community. Anyone should be able to complain to the body about election irregularities. The body should act quickly and fairly and everyone should respect its decisions. 	DBR	8	

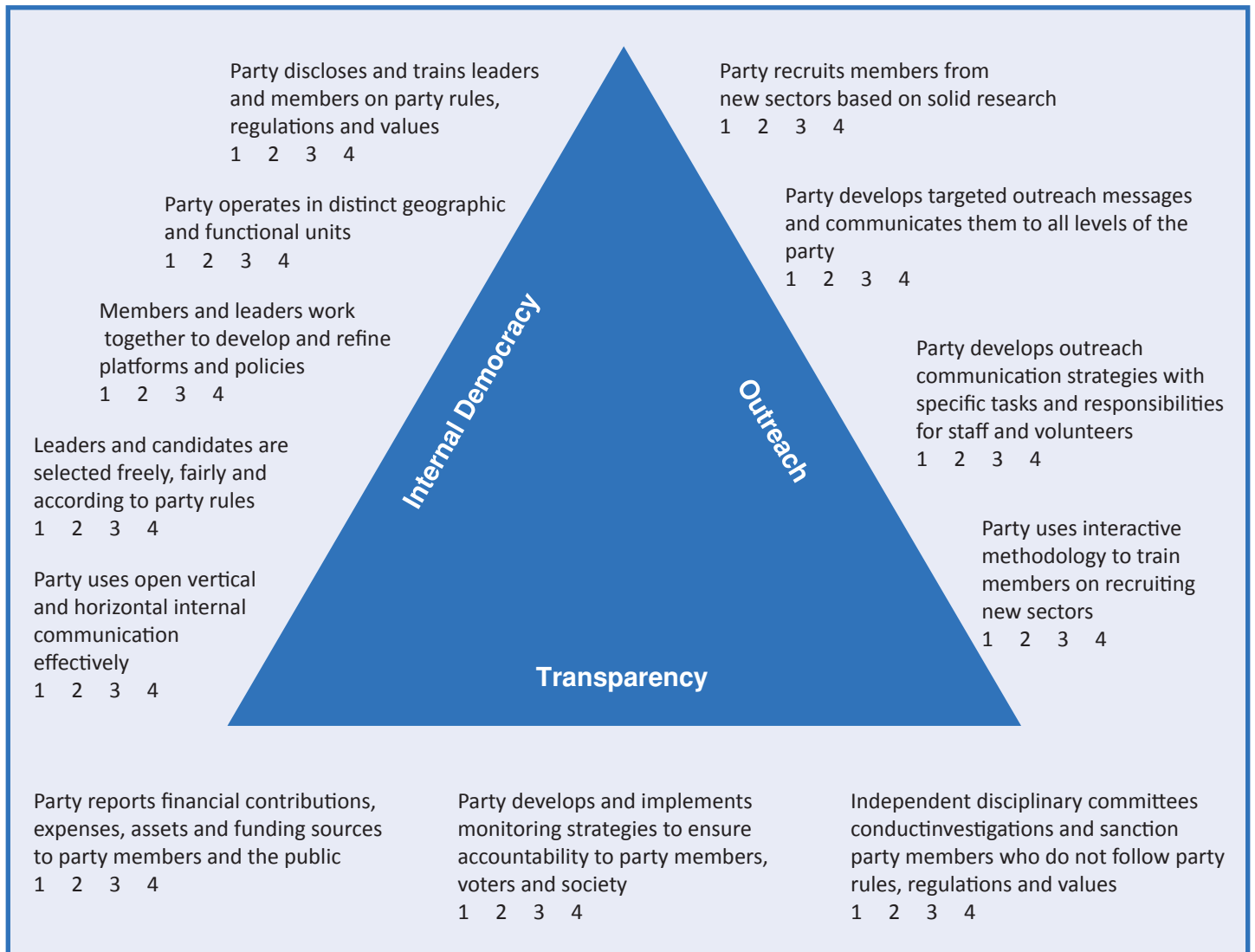
CONCLUSION – 2'

Political parties, civil society and the media play critical roles in democratic systems. Their roles are clearly defined and relationship among them is dynamic and can be both codependent and tense.

To play a critical role in building a democracy, political parties must be democratic themselves.

Regular, transparent, and inclusive elections provide legality and legitimacy to government.

Triangle of Political Party Best Practices



1. How did you rate your party in Internal Democracy?
2. How did you rate your party in Transparency?
3. How did you rate your party in Outreach?
4. In which areas do you believe your party has demonstrated relatively good practice?
5. In which areas do you think there is room for improvement?
6. Were you surprised by any of your findings? If so, in what way?

Women's Political Participation

In politics, women's participation is more than a matter of fairness or equality; gender balance in decision-making has a direct impact on a country's stability and its ability to develop. When women share decision-making power with men at meaningful levels, countries experience a higher standard of living.¹ Positive developments can be seen in key areas, particularly education, health and infrastructure – all of which fuel economic development.

Women are force multipliers when it comes to economic growth. Programming and services that deliver better outcomes for women, e.g., higher levels of education and literacy or lower levels of poverty, also increase the well-being of their family members, in part because women reinvest 90 percent of their wealth in their families and communities.²

Women's participation also results in tangible gains for democratic governance and higher levels of satisfaction among the electorate regarding how the government is performing. When there is greater gender balance in government, voters experience:

- Greater responsiveness to citizen needs;
- Increased cooperation across party and ethnic lines; and,
- In conflict situations, more sustainable peace.³

Women are more likely to work across party lines and strive for consensus, even in partisan and polarized environments. Peace agreements and post-conflict reconstruction have a better chance of long-term success when women are involved.⁴

There is also substantial evidence that gender-balanced decision-making bodies, including boards of governors, executive committees and judicial bodies, function better. Boards with better gender balance pay more attention to auditing their work and to controlling risk, which suggests that they may be better able to minimize corruption and financial mismanagement.⁵

1 The tendency of women policy-makers to prioritize education, health and infrastructure in particular leads to better outcomes for citizens and a higher quality of life. This has been documented in a number of studies. See: Chen, Li-Ju (2008) "Female Policymaker and Educational Expenditure: Cross-Country Evidence." Research Papers in Economics 2008: 1 Stockholm University, department of Economics, revised, Feb 27, 2008, http://ideas.repec.org/p/hhs/sunrpe/2008_0001.html; and, UNICEF (2007) "Women and Children: The Double Dividend of Gender Equality," <http://www.unicef.org/sowc07/report/report.php>. See also the background papers for the UNICEF report, including Beaman, L. et al. (2007) "Women Politicians, Gender Bias, and Policy-making in Rural India," and Schwindt-Bayer, L. (2006) "Female legislators and the promotion of women, children, and family policies in Latin America," http://www.unicef.org/sowc07/docs/schwindt_bayer.pdf.

2 By contrast, research suggests that men reinvest 30-40% of their wealth in their families and communities. See Half the Sky Movement, www.halftheskymovement.org

3 Strickland, R. and N. Duvvury (2003), "Gender Equity and Peacebuilding: From Rhetoric to Reality: Finding the Way." International Center for Research on Women, http://www.icrw.org/docs/gender_peace_report_0303.pdf; Powley, E. (2003) "Strengthening Governance: The Role of Women in Rwanda's Transition," Women Waging Peace and The Policy Institute, Hunt Alternatives Fund, http://www.huntalternatives.org/download/10_strengthening_governance_the_role_of_women_in_rwanda_s_transition.pdf; International Crisis Group (2006), "Beyond Victimhood: Women's Peacebuilding in Sudan, Congo and Uganda" in *Crisis Group Africa Report N°112*; Women for Women International (2007), "Stronger Women, Stronger Nations 2007 Kosovo Report," http://www.womenforwomen.org/news-women-for-women/files/8254_Kosovo_Report_Spreads.FINAL_000.pdf.

4 Ibid.

5 There is substantial evidence on this point, primarily from the private sector. See coverage of the Association of British Insurer's report on effective boards, http://www.ivis.co.uk/PDF/ABI_1684_v6_CS4.pdf and the European Union report (2012), *Women in Economic Decision Making in the EU*, pg. 7, http://ec.europa.eu/justice/gender-equality/files/women-on-boards_en.pdf

Political parties that take women's participation seriously stand to gain on a number of fronts. Most significantly, women voters outnumber men voters in most countries simply because women tend to live longer than men. As such, women voters have the potential to deliver the margin of victory in many elections for parties that take their issues seriously.

To achieve these gains, political parties must look for women's participation to be both quantitative (in sufficient numbers around 50 percent) and qualitative (women must be given genuine power and authority, not just be there to fill a quota or make the party look like it's sympathetic to issues affecting women).

In most countries there are no legal barriers to women standing for election. Women's under-representation is a result of other obstacles such as candidate selection processes and the dominant political environment, which is less likely to value their contribution or accommodate their needs. Women are less likely to be selected as candidates or to have access to the resources necessary to run a competitive campaign.

For most political parties, genuinely committing to women's participation requires a fair amount of self-reflection, internal review and significant change.

1. Think about your own political party. How many women are in the party's senior leadership? Do they play a significant role in decision-making? Do they have the same level of power and authority as their male peers?
2. What is your party's candidate selection process? Do you consider it gender blind? Are specific mechanisms used to recruit women as candidates? Are women given viable positions on party lists or selected in constituencies where the party has a chance of winning?
3. How many elected women parliamentarians do you have, and what percentage of your party's MPs are women? How many of them hold senior posts within the party's parliamentary caucus or the legislature itself?
4. How many women elected officials does the party have at the regional or local level, and what percentage of the party's elected officials are women?
5. Does your party have recruitment and advancement mechanisms for women, such as training programs or outreach campaigns focused on bringing women into the party?
6. Does your party have a mechanism for policy development focused specifically on issues affecting women?
7. Does your party have a women's wing? If so, does it have its own budget? Does it have the authority and autonomy to make its own decisions?
8. The six most common barriers to women's participation are listed below. Review them and consider whether your political party has any specific mechanisms or programs to address these barriers.

Childcare/Caring Responsibilities – Women are much more likely to be the primary caregivers of children and to carry most of the household responsibilities. This may mean that they simply don't have time for politics. When women are able to enter politics and take on those additional duties, their workload at home often stays the same, creating overwhelming demands on their time.

Cash – The cost of a viable campaign can be prohibitive for many women. Worldwide, women's financial earnings do not match those of men. In situations where women are also expected to be the primary caregivers, women candidates may have the additional cost of childcare or household support, making time away from families to campaign even more expensive or unaffordable.

Confidence – Women are less likely to perceive themselves as qualified for political office, even though they may have the same abilities as male peers, and are also less likely to receive encouragement to pursue positions of political leadership.

Culture – Cultural barriers to women's political participation exist both in society and within political parties. There may be societal expectations for women that make it difficult for them to be perceived as political leaders. Additionally, the culture within political parties and the accepted norms of behavior can make them uncomfortable places for women. Political meetings may be held in locations where women feel – or are – excluded, or they may be held at times that are unsuitable for those with caring responsibilities, or unsafe times for women to travel.

Class – Social and economic class can be a barrier to women's political participation. There is often an expectation that politicians will have a degree of formal education and social status; less value can be placed on life experience and practical skills. These expectations can impede the ascent of women, particularly those with fewer official educational qualifications, those from a poorer or economically deprived background, and those from rural areas.

Candidate Selection Processes – Candidate selection processes have the single greatest impact on a woman's ability to stand for office and be elected. Confidence and childcare become irrelevant for campaigning and holding office if a woman cannot make it through a candidate selection process with any chance of being elected.

Internal Audit on Youth Participation

Today's generation of young people is the largest in history. By 2015, nearly half the world's population – more than three billion people – will be under the age of 25.⁶ Young people are the fastest growing segment of the population in countries in the Middle East and North Africa (MENA), with children and young people under the age of 25 comprising about 60 percent of the current population. The median age of the total population in the region is 22 years, compared with the global average of 28.⁷

These numbers are a serious call to action for political parties worldwide, particularly in the MENA region:

- Political parties must view young people as an asset who can make significant contributions to the growth, development and stability of their countries. However, they require the appropriate support and investment to achieve their potential.

⁶ UK Department for International Development (2010), *Youth Participation in Development*, pg. 7, see <http://www.ygproject.org/>

⁷ George Mason University, *Children and Youth in History* website, <http://chnm.gmu.edu/cyh/primary-sources/424>

- The policy needs of children and young people must be taken seriously by political parties and lawmakers. For example, it is projected that the MENA region will require more than 51 million new jobs by 2020 to employ these young people, whose current rate of unemployment is more than twice that of the rest of the adult population.⁸ This will be a particular challenge as more than 100 million of these young people currently do not attend school.
- This large population of young people must be perceived as representing new ideas, new energy and new opportunities, and not as a problem to be contained or controlled.

Political parties that seize the opportunity offered by this large population of young people stand to gain substantially in the coming years, in terms of electoral support and increased membership. Acting on the issues which affect young people is also likely to lead to more success in governing.

Maximizing the potential of young people starts with recruiting them as political party members. From there, the opportunities that parties offer to young people will have a direct impact on whether or not they become active members, or chose to stay as members. The more a party implements an internal merit-based system for promotion within the party – rather than expecting young people to quietly wait their turn for leadership opportunities behind older members who have been their longer, regardless of ability – the more likely it is that the party will retain young people as members and supporters, and benefit from their energies and talents.

1. Does your party have a youth wing and/or a student wing? If so, does it have its own budget? Does it have the authority and autonomy to make its own decisions? Is it represented in the executive of the party?
2. How does your party define youth? What is the cut off age to belong to the youth wing? Is it applied to the leadership of the youth wing? Does this genuinely represent a youthful age, or are people well beyond their youth involved?
3. What are some of the priorities for youth in your party?
4. What are the barriers or obstacles to youth participation in your party?

⁸ Ibid.

Campaign Skills Trainer's Guide

Module 2

Leadership Styles and Skills

What Makes a Good Leader?



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 2: LEADERSHIP STYLES AND SKILLS

SESSION OVERVIEW:

Leadership skills are fundamental to enhancing the effectiveness of elected officials, political party activists, candidates for public office, and political party officials. This module outlines theories of leadership, how it works in practice the core skills that are part of effective leadership. This module also differentiates between leadership and management, reviews different styles of management and explores some of the skills needed to effectively build and manage a team.

SECTIONS:

1. Defining Leadership and Effective Leadership
2. Leadership Spectrum
3. Leadership vs. Management

LEARNING OBJECTIVES:

- Defining leadership
- Identifying characteristics and skills needed for effective leadership
- Identifying different styles of leadership
- Distinguishing leadership from management

TIME: 95 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- Worksheet: Situational Leadership
- Worksheet: Leadership vs. Management

PREPARATION:

- Writing on the flipchart in advance:
 1. Agenda (optional – if it is not copied)
 2. Learning Objectives

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer's Presentation

PEE – Participants' Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES


SECTION 1 - Defining Leadership and Effective Leadership – 30'

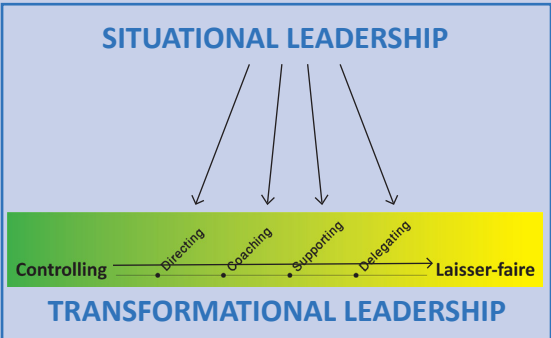
Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the session and review the learning objectives.</p> <p>Explain that when we are talking about leaders, we are talking about the people who guide or direct groups or organizations.</p>	TP	2	<p>Different languages have more than one translation for the words “leader” and “leadership” and sometimes some of the translations have implied a slightly or completely different and negative meaning (due to cultural and traditional background). If that is the case with your language, make sure you either use the closest translation possible (even if it is not as common) or explain to participants what meaning of leadership this session is going to discuss.</p>
2	<p>Ask participants to think of someone, living or dead, who they think is or was a good leader. Explain that that person can be from any aspect of life – sports, business, politics, your own family or friends, etc. Ask them to write down the skills, abilities or character traits which make this person a good leader.</p>	PEE	3	<p>Depending on how much time you have, there are two ways to conduct this exercise:</p> <ol style="list-style-type: none"> 1. Keep participants in a large group and ask them to shout out their suggestions. 2. Move the participants into small groups of 3-5 people. Ask them to discuss their ideas and select one leader as a team. <p>Some participants may choose a controversial leader or historical figure whose leadership is perceived to have had negative effects, to have been ruthless or dictatorial, for example. This is perfectly acceptable. The purpose is to focus on the skills, abilities and characteristics of these leaders. Ask participants to identify these aspects of the leaders they have identified, even if he or she was perceived by others negatively. The consequences of negative leadership will be addressed later in the workshop.</p>

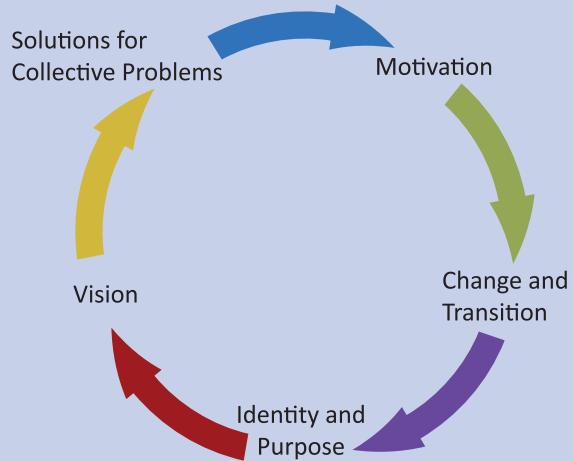
Steps	Description	Type	Min	Note to the Trainer
3	<p>After participants have completed their work, ask them to share their answers with the larger group. Note the leaders they have selected on one piece of flipchart paper, and the skills, abilities or character traits on another.</p> <p>As participants are giving their answers, ask them why they have selected their particular leader.</p>	DBR	12	The purpose of separating the list of leaders with the list of skills and characteristics is to stress that leadership involves developing and improving skills, and is not just about the attributes that people are born with. It also helps build towards the discussion on what makes an effective leader.
4	<p>Ask participants: What do you think makes an effective leader? Facilitate a brief discussion, and guide participants towards the understanding that effective leaders are those who have a positive impact on the group they are tasked with leading and on their shared purpose or functions.</p> <p>Return to the skills, abilities and characteristics participants listed in the previous exercise and ask the group to select those they think are most important for an effective leader.</p> <p>Mark those they agree are important, and if the group disagrees about some of them mark them with different color. (It is not important to reach consensus during this discussion.)</p> <p>At the end of this section, remind participants that there are more than 350 definitions of leadership so that it is neither possible nor necessary to come up with a single answer for what constitutes leadership. Essentially, effective leaders are those who focus on the future, make things happen and have a positive impact on others.</p>	DBR	5	<p>Ensure that all of the following characteristics are listed as the characteristics of an effective leader. If it is helpful, you can write them on the flipchart in advance and review them during the debrief, along with those proposed by participants:</p> <ul style="list-style-type: none"> Charismatic Visionary Persuasive Instills or inspires loyalty Decisive Intelligent Independent Good networker Motivates others Flexible Good communicator Trusted Influential Honest Ethical Strong Likeable Passionate Purposeful or focused

SECTION 2 – Leadership Spectrum – 45’

Steps	Description	Type	Min	Note to the Trainer
1	Ask participants to think about the leadership roles they have taken on in their own lives. Encourage them to think broadly and consider everything from their professional responsibilities, to the roles they take on in their families or their communities. Do they coach a football team? Are they teachers leading a class? Are they official leaders in the local community? Do they director or lead a team at work?	DBR	3	When the participants start giving answers on what the leader’s role is, ensure they think widely – for example, the coach of a football team, the teacher in a classroom, the roles we take on within our families, all the way up to national and world leaders.
	<p>Ask participants to pick one of these roles that they have taken on in their own lives and think about what form of leadership they generally practice in this role.</p> <p><i>Are you more controlling as a leader? Do you seek to make most of the decisions yourself and then inform or direct others what to do?</i></p> <p><i>Or, are you more laissez-faire as a leader?</i></p> <p>Do you include others in decisions? Write or reveal the controlling/laissez faire spectrum you have written on the flipchart. Ask a number of participants (invite them all if there is sufficient time) to come to the front of the room and map where they think their leadership style for this particular role generally sits on the spectrum. They can do this by putting a mark on controlling or laissez-faire, or anywhere in between. Once they have marked the spectrum, they are invited to reveal what the leadership position was they were thinking of.</p>			<p>As you are explaining two kinds of leaders write on the flipchart:</p> <div data-bbox="949 831 1503 907" data-label="Diagram"> </div> <p>As participants mark the spectrum, you are likely to find that many will map their own leadership styles somewhere in between controlling and laissez-faire, rather than on either of these polar ends. Others will say, “it depends on the situation.” Both of these are key learning points for moving into the discussion on situational leadership. Ask participants to consider where they sit on the spectrum most of the time.</p>

Steps	Description	Type	Min	Note to the Trainer
2	<p>Review where participants have mapped their leadership style on the controlling/ laissez-faire spectrum. Explain that what they have revealed is the fact that leaders need more than one set of leadership skills available to them, and that the style they employ should be adapted to the situation.</p> <p>Ask participants to consider, for example, the following situations:</p> <ul style="list-style-type: none"> • a fire chief needs to get a large crowd away from a burning building that's about to collapse • the head of a fragile coalition of political parties needs to reach consensus among all the parties on a controversial issue • a father needs to convince his two year-old daughter to eat her vegetables <p>Ask participants (rhetorically) where they would map each of these situations. Make the point that, instead of just two styles of leadership, there are actually many more options along the spectrum of leadership styles from which to choose, and these are available to all leaders at any time, depending on the situation.</p> <p>Add to the graph on the flipchart other four leadership styles explaining meanings of directing, coaching, supporting and delegating:</p>	TP	7	<p>On the blank flipchart sheet just add directing, coaching, supporting and delegating:</p> 
2	<p>Directing – Leaders define the roles and tasks of team members, and supervise them closely. Decisions are made by the leader and announced, so communication is largely one-way.</p> <p>Coaching – Leaders still define roles and tasks, but seek ideas and suggestions from team members. Decisions remain the leader's prerogative, but communication is much more two-way.</p> <p>Supporting – Leaders pass day-to-day decisions, such as task allocation and processes, to team members. The leader facilitates and takes part in decisions, but control is now largely with the team itself.</p> <p>Delegating – Leaders are still involved in decisions and problem-solving, but control is with the team. The team decides when and how the leader will be involved.</p>			

Steps	Description	Type	Min	Note to the Trainer
3	<p>Continue this section with presenting situational and transformational leadership:</p> <p><i>This modified spectrum helps us understand two more contemporary models of how leaders can approach their work: situational leadership and transformational leadership.</i></p> <p>Situational leadership suggests that effective leaders should have the skills and abilities which permit him or her to adopt a different style or approach, depending on the situation she or he is facing. This creates more options for leaders and supports the need for strong leaders to be both flexible and self-aware. Flexibility means that a leader can read a situation and respond to the particular needs of that situation, whatever dynamics are at play, and not remain rigid or unresponsive. Self-awareness requires a leader to know what his or her strengths are, so that if a situation calls for skills they do not possess, they can call in others to help or support them.</p>	TP	5	<p>As you are explaining them, add “situational leadership” and “transformational leadership” on the previous flipchart, with arrows indicating how these models relate to the various leadership styles, like this:</p> 
3	<p>Transformational leaders are those who work closely with those whom they lead to achieve a higher level of morale, motivation and performance. This interaction starts off with the leader being very closely involved in the work of his or her team, then gradually pulling away as systems start to work and team members become more autonomous and capable.</p> <p>A transformative leader inspires subordinates to work for something more than just self-gain. This type of leader encourages team members to use innovation and initiative to challenge the status quo and achieve new types of success, and builds consensus and support for the team’s goals and vision. Effective leaders can use various degrees of the four approaches, which are mapped out on the spectrum, for achieving this transformation and growth within a team. From the left to the right side of the diagram above, these methods start with the leader being highly involved in the team’s work, then gradually less so as capacity and confidence grow.</p>			

Steps	Description	Type	Min	Note to the Trainer
4	<p>Tell participants that the following activity will lead them through different scenarios which require a leader's reactions and decisions. Participants' task is to consider the leadership styles that have just been discussed, as well as their own leadership experiences, and to write how they would act in each described situation and what they would do if they were a leader.</p> <p>Handout the Situational Leadership Worksheet (Appendix 1) and give 10 minutes for participants to answer.</p> <p>After the participants have completed writing their answers have them report. Spend the remaining 15 minutes on reporting and discussing the different approaches that come up.</p>	ANK + BDR	25	Report out one situation at a time. Have a volunteer read the first situation and then give his or her answer. Ask if there were different approaches and have one or two participants read their answers on the same situation. Repeat the same process for all five situations ensuring all the participants were included.
5	<p>Wrap up the previous exercise by saying that:</p> <p><i>Leaders emerge in any aspect of life – sports, medicine, academia, science, arts, etc., but political leadership is broader than any other field. A political leader is expected to be able to manage vast issue areas from foreign affairs to public health, from economic development to social well-being, from culture, art and sports to education and training. Political leaders are expected to run organizations that can compete in elections (political parties) and deliver key services to citizens effectively (through government departments and agencies); to meet the immediate collective needs of society and paint a vision for the future; and to build a strong economy and manage public funds. The demands and expectations placed on political leaders, therefore, frequently exceed those for leaders in any other domain of society.</i></p>	TP	5	<p>The Circular Process of Political Leadership:</p>  <p>When explaining three ways to influence people, you can refer back to the first brainstorming when you asked the participants who they consider a great leader if negative and controversial historical characters were mentioned.</p>

Steps	Description	Type	Min	Note to the Trainer
	<i>The process of political leadership is circular and constant. Political leaders continuously move in a cycle of problem-solving and motivation, and endeavor to pull the support and participation of citizens into that energy.</i>			
5	<p><i>There are three ways that political leaders can attempt to influence groups or individuals to participate in or support what they are trying to achieve throughout this cycle. These are: power, payment or persuasion.</i></p> <p>Power – to exert one’s authority over another, sometimes by force Payment – to offer material or financial goods in exchange for support Persuasion – to induce someone to undertake a course of action or embrace a point of view by means of argument, reasoning, or entreaty</p> <p><i>All three of these choices are options for leaders, but the one that is most sustainable and has the most enduring positive impact on an individual’s leadership is persuasion. Power and payment can work, but they are typically only effective for short periods of time. Money runs out; power can too. When a leader is able to convince people to embrace an opinion or course of action using persuasion, the support is more enduring, more sincere and less costly. For individuals and movements newer to political life, power and payment may not be options, but persuasion is available to all.</i></p>			

SECTION 4 – Leadership vs. Management – 19'

Steps	Description	Type	Min	Note to the Trainer				
1	<p>Ask the participants: What is the difference between a leader and a manager? Facilitate discussion and write answers on the flipchart. Summarize the outcome:</p> <p><i>The tasks of leading and of managing are distinct yet complementary. Leaders lead people; managers manage tasks. Managers have subordinates; leaders have followers or supporters. Many people are both a leader and manager at the same time, especially in politics.</i></p> <p><i>Whereas aspects of leadership may come naturally to some, management skills are more likely to be learned. It is therefore important to distinguish the skills associated with leadership from those of management.</i></p>	DBR	5	<p>Write their answers on the flipchart in two columns like this:</p> <table><tr><th><u>Leader</u></th><th><u>Manager</u></th></tr><tr><td></td><td></td></tr></table>	<u>Leader</u>	<u>Manager</u>		
	<u>Leader</u>			<u>Manager</u>				
	<ul style="list-style-type: none">• <i>Management is about coping with complexity or bringing order to a situation. It involves:</i><ul style="list-style-type: none">◦ <i>Planning, budgeting, organizing, staffing, controlling processes and developments, creating systems for communication and solving problems.</i>◦ <i>Management deals with ongoing day-to-day complexities in an organization.</i>◦ <i>Managers must create a positive, supportive climate which is conducive to creative and productive work</i>• <i>Leadership is about setting direction, supporting people, coping with change, and providing motivation. It involves:</i><ul style="list-style-type: none">◦ <i>Motivating, coaching, empowering, building relationships, creating a shared vision and communicating that vision.</i>◦ <i>Leadership includes effectively orchestrating important change, as well as envisioning and creating a positive future.</i>							
2	<p>Hand out the Leadership vs. Management Worksheet ask the participants to put an L or an M on the line after each statement to indicate whether the statement best describes the role of a leader (L) or a manager (M). When they are finished read statement by statement asking what their answer is. Let the participants discuss those statements they have different answers for.</p>	PEE	14	<p>Five minutes should be enough for the participants to read and answer, and the rest of 10 minutes is for group discussion. Optionally, instead of copying worksheet, you can read statement by statement asking the participants to decide whether it is leader’s or manager’s role.</p>				

CONCLUSION – 1'

Even if some of the aspects of leadership may come natural for some people, good leaders always work to improve their skills and leading abilities by:

- Recognizing and understanding different characteristics of effective leaders
- Exploring and learning about various leadership styles and selecting the most suitable ones, depending on the situation
- Identifying the skills associated with leadership from those of management.

Worksheet Situational Leadership

Review the descriptions below. Then, think back to the Leadership Spectrum in this section, as well as your own experiences with leadership. What do you think the best leadership approach would be to address each situation? What would you do?

1. You are the leader of the party in government. The head of the budget office has just been to see you. She informed you that in two month's time there will not be enough money in the public accounts to pay salaries for government employees, including teachers, civil servants, health workers and civil police. What type of leadership is required to address this situation?
2. You are the head of the youth wing of a newly-formed political party that is facing its first ever elections. There are more than 20 political parties competing in the elections in six weeks and the voters are already confused. What type of leadership is required to address this situation?
3. You are a member of the executive board of a political party. The party's leader has just been forced to resign after a newspaper reporter revealed that he used illegal donations to the party from foreign businessmen to buy a boat for himself. The paper printed pictures of him on the boat with a woman who was not his wife. What type of leadership is required to address this situation?
4. You are one of 10 women in a parliament with almost 200 men. You are not being given any leadership positions within the party or within the parliament. You are struggling to get your voice heard during plenary sessions. What type of leadership is required to address this situation?
5. You are the leader of a political party in opposition. There has been a disaster: 300 factory workers were killed when the building in which they were working caught fire. All the doors were chained shut so they could not escape. What type of leadership is required to address this situation?

Worksheet Leadership vs. Management

Consider each of the statements below. Put an **L** or an **M** on the line after each statement to indicate whether you think the statement best describes the role of a leader (L) or a manager (M).

- a) Provides structure _____
- b) Uses imagination _____
- c) Asks what and why _____
- d) Administers _____
- e) Inspires trust _____
- f) Gives answers _____
- g) Keeps an eye on the budget (income and expenses) _____
- h) Does the right thing _____
- i) Uses common sense _____
- j) Creates vision and meaning for the organization _____
- k) Asks how and when _____
- l) Provides support _____
- m) Has an eye on the future _____
- n) Does things right _____
- o) Formulates long-term objectives for change _____
- p) Acts within the established culture of the organization _____
- q) Asks questions _____
- r) Innovates _____
- s) Relies on control _____

Campaign Skills Trainer's Guide

Module 3

Preparing for an Election

Analysing Trends, Setting a Vote Goal and Targeting Voters



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 3: PREPARING FOR AN ELECTION

Analysing Trends, Setting a Vote Goal and Targting Voters

SESSION OVERVIEW:

This module teaches participants to think about how to approach an electoral campaign strategically, to use resources wisely and to communicate only with those voters who are receptive to the campaign's message. To do this, this module instructs participants in how to calculate the number of votes they will need in order to win, and how to determine where they find those votes. Participants will learn how to research and understand voting trends in their area assess likely voter turnout and understand how these dynamics will affect their campaign.

SECTIONS:

1. Resources
2. Research and Analysis: Voting Trends
3. Research and Analysis: Electoral Environment
4. Setting a Vote Goal
5. Voter Targeting: Geographic
6. Voter Targeting: Demographic

LEARNING OBJECTIVES:

- Understanding campaign strategy and resource management
- Using past voter behavior to identify voting trends
- Assessing the electoral environment to project voter turnout
- Setting a vote goal
- Targeting voters based on geographic and demographic breakdowns

TIME: 170 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (can be written on the flipchart)

HANDOUTS:

- Data necessary to calculate a vote goal (if not using Dromora example)
 - Number of seats a party is competing for (this may be determined by participants during the session)
 - Number of voters registered in the voter's list
 - Estimated voter turnout
 - Number of contestants (political parties or candidates)
- Materials for geographic targeting: official election returns, mock returns or maps of the relevant area
- Materials for demographic targeting: census or other demographic information (if available)

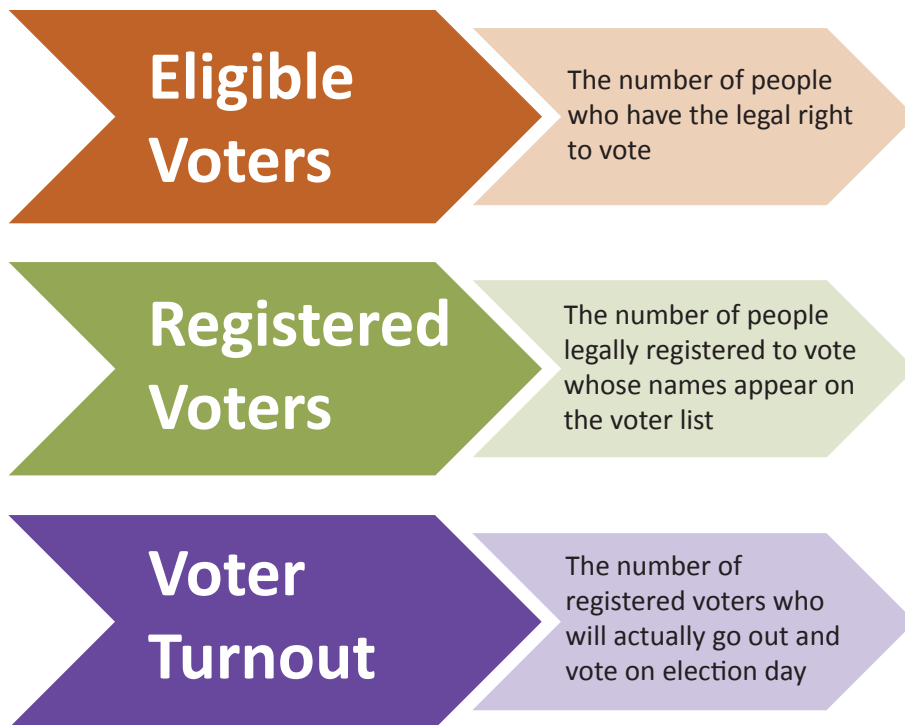
PREPARATION:

Write on the flipchart in advance:

- Agenda (if it is not copied)
- Learning Objectives
- Four main resources: people, money, time, information
- Voting trends:

- Overall voter turnout
- Turnout among different groups

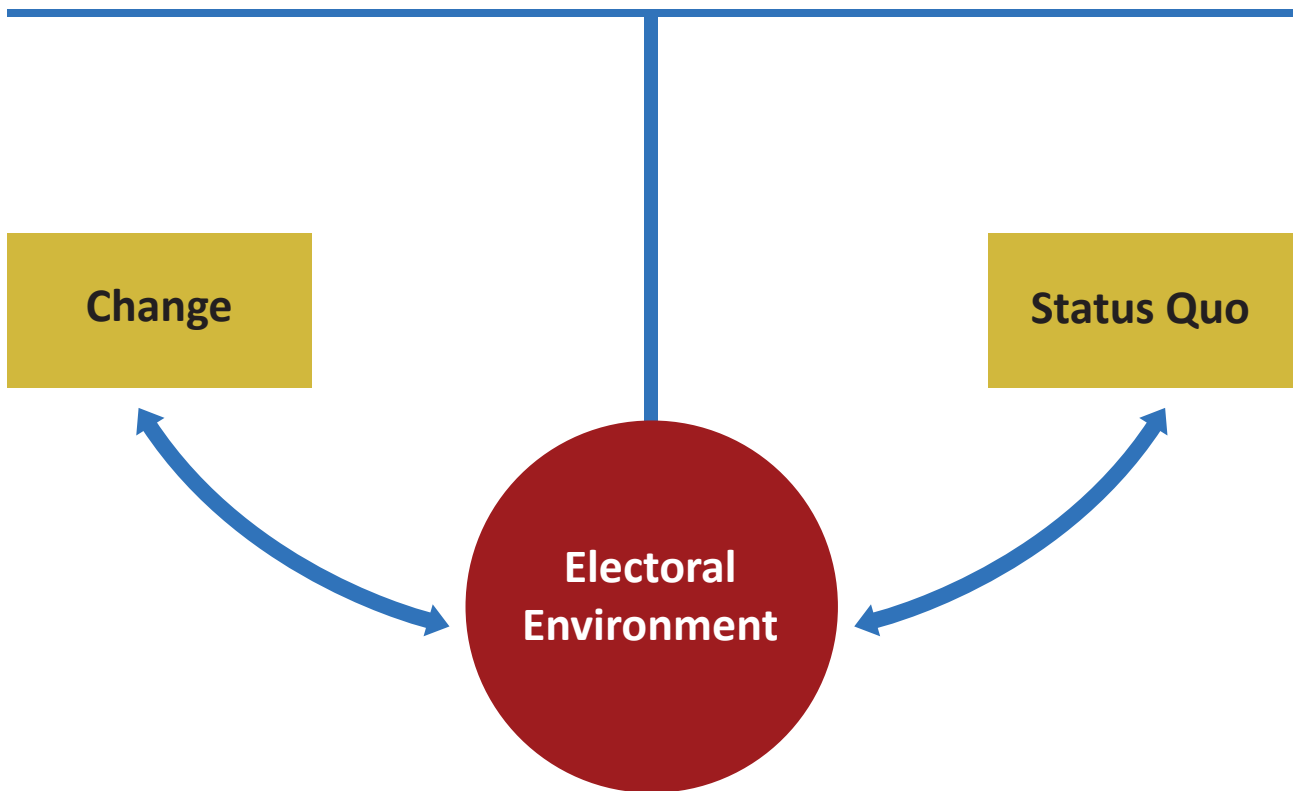
- Turnout explanation graph (optional):



- Table for examining voting trends

Year	Type of Election	Turnout
1998	Parliamentary	89%
2003	Parliamentary	73%
2005	Parliamentary	62%
2010	Parliamentary	58%
	Total	282
	Divided by 4 elections	282/4
	Average Turnout	70.5%

- Electoral environment pendulum:



- Steps to calculate a vote goal
 1. Identify the **number of seats** in the electoral area.
 2. Determine the number of eligible **registered voters** in the electoral area.
 3. Estimate what **voter turnout** is likely to be for the area.
 4. Based on estimated voter turnout, calculate how many votes it will take to **win one seat**. This will be different depending on the electoral system.
 5. The number of votes a campaign will need to capture the number of seats they want to win is the vote goal.

KEY FOR THE TYPES OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

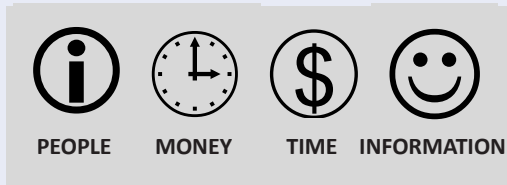
DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge


TRAINING ACTIVITIES

SECTION 1 – Resources – 10'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review the learning objectives.	TP	2	
2	<p>Introduce the four main resources by asking participants what they would need for a campaign. Encourage them to mention as many things as possible (leaflets, phone calls, ads, premises, etc.).</p> <p>Once participants have brainstormed a short list, tell them that all those things come from the four main resources: people, money, time, and information. Illustrate the point by saying, for example, that for printing leaflets they either need money or a party member or supporter who owns a printing shop and is willing to print leaflets for free.</p> <p>Emphasize that every campaign has different amounts of money and different numbers of people involved, but that the amount of time available is the same for all. Time, therefore, creates a level playing field if it is used wisely. Decisions informed by research and information tend to yield more results for the campaign.</p> <p>Conclude with the following point: running a winning campaign is not about having the most resources; it is about using what you have effectively and strategically.</p> <p>This module is about learning how to strategize and be able to decide where to invest your resources to make them as efficient as possible in persuading people to vote for a party or candidates.</p>	TP	3	<p>Have an illustration of resources prepared on the flipchart in advance, like this or draw one while you are explaining the resources:</p>  <p>During this activity, lead the participants to understand that campaigning is about making critical decisions and thinking strategically.</p>

SECTION 2 – Research and Analysis: Voting Trends – 22’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce this section by saying that all good strategy starts with research.</p> <p>Ask participants where the best place to start researching might be. All answers will likely be valid, but guide participants towards thinking about the voters as the best place to start.</p> <ul style="list-style-type: none"> • What is happening among the voters? • How are they feeling about voting, elections and politics in general? <p>Explain to participants that we focus on voters because:</p> <ul style="list-style-type: none"> • Very often people involved in politics think they can credibly assess the political environment by just living in it. This can be a trap, because each person mingles among and interacts within a social network which was created based on mutual interests and common social circumstances. In other words, we tend to be surrounded by people “like us” who may not represent the diversity of political opinion out there. • People involved in politics pay more attention to politics than people who are not involved in politics. Therefore, we tend to be more politically aware than most people, which makes us different as well. • No matter how many people you know, your social network can never be representative of the whole electorate. <p>Therefore, to be able to understand what a broader population of people think and feel about politics and what they care about, it is important to look at facts and figures, as well as to examine and survey trends in voting behavior.</p>	DBR	4	<p>Participants who are politically aware and politically active, particularly those coming from families or communities that take a leading role in local politics, often feel they know everything they need to know about the voters.</p> <p>Help participants understand that the behavior of voters and their political opinions may be more malleable and changeable than we assume. If it’s helpful, tell the story of Tip O’Neill, the speaker of the US House of Representatives, to enforce the point about not making assumptions of the intentions of voters. If this story isn’t suitable for your audience, construct your own story using local personalities or situations to make the same point.</p> <p><i>[Tip O’Neill was a member of the US Congress for 35 years and the speaker of the US House of Representatives. He was an extremely powerful man and a popular politician who won every election with a very large majority of votes. He was also extremely loyal to his family and local community and lived in the same area his entire life.]</i></p> <p><i>One day, shortly after an election, he was walking home and ran into his neighbor, Mrs. Murphy. Tip had known Mrs. Murphy since he was a boy and he greeted her when he saw her. Mrs. Murphy said hello to Tip and congratulated him on his victory in the recent election. Tip said, “Thank you, Mrs. Murphy, and thank you for your vote.”</i></p> <p><i>Mrs. Murphy said, “I didn’t vote for you.” Tip was astounded. He exclaimed, “But Mrs. Murphy, you’ve known me since I was a boy! You’ve voted for me my entire political career! Why didn’t you vote for me?”</i></p>

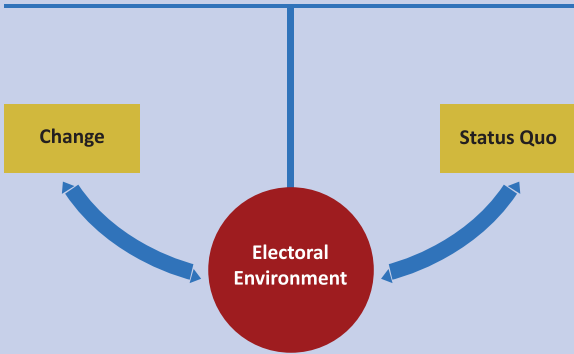
Steps	Description	Type	Min	Note to the Trainer
	Learning about voters can be done by looking for trends among voters and examining the electoral environment.			<p>And Mrs. Murphy said, “Because you didn’t ask.”]</p> <p>The point of the story is that we shouldn’t take voters for granted, and we shouldn’t make assumptions about what they are thinking and what they will do in an election. Figuring this out begins with research and analysis.</p>
2	<p>Explain the following: Trends are patterns that help us predict how voters will behave. Trends can emerge even over a short period of time. To figure out what the trends among voters are, it’s helpful to collect and examine information about previous elections.</p> <p>Introduce the different voting trends which can be learned about from the results of previous elections:</p> <ul style="list-style-type: none"> - Overall voter turnout - Turnout among different groups <p>Turnout is the number or percentage of eligible voters who actually go out and vote on election day.</p> <p>Further explain turnout by saying that there have been no elections in history in which 100% of the people eligible to vote actually voted. There is always a percentage of the population that does not participate for different reasons.</p>	TP	3	<p>For explaining voter turnout you can use the following graph:</p> 

Steps	Description	Type	Min	Note to the Trainer																											
3	<p>Ask participants why trends in overall voter turnout are important. The answer you are looking for is: you need to know how many people are expected to vote and who these voters are in order to set a clear goal for how you will win an election.</p> <p>Walk the participants through the steps to identify trends in voter turnout:</p> <p>1. Examine the results from past elections. It is best to use turnout figures for similar elections. For example, look at the figures for parliamentary elections to estimate turnout for a parliamentary election, local for local elections, etc.</p> <p>2. Track overall voter turnout. Ideally, it is best to have several examples of the same types of elections, e.g., several parliamentary, presidential, local or regional elections from different years. <i>However, if there have not been very many elections or if there has been a significant change in the political environment or system of elections, then use whatever information is available.</i></p> <p>If you have several years of elections to work with, track trends in voter turnout for the most recent years. For example:</p> <table><tr><th>Year</th><th>Type of Election</th><th>Turnout</th></tr><tr><td>1998</td><td>Parliamentary</td><td>89%</td></tr><tr><td>2003</td><td>Parliamentary</td><td>73%</td></tr><tr><td>2005</td><td>Parliamentary</td><td>62%</td></tr><tr><td>2010</td><td>Parliamentary</td><td>58%</td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td>Total</td><td>282</td></tr><tr><td></td><td>Divided by 4 elections</td><td>282/4</td></tr><tr><td></td><td>Average Turnout</td><td>70.5%</td></tr></table>	Year	Type of Election	Turnout	1998	Parliamentary	89%	2003	Parliamentary	73%	2005	Parliamentary	62%	2010	Parliamentary	58%					Total	282		Divided by 4 elections	282/4		Average Turnout	70.5%	DBR + TP	10	<p>Sometimes, information on past voter turnout not publicly available or is not reliable. If this is the case, encourage participants to think of other ways they can get this information. Options include gathering data from:</p> <ul style="list-style-type: none">domestic or international election monitoring groupsacademic institutions or think tanks national or international media coveragelocal party branches, which may be able to come up with figures for eachlocal area based on their experience and any records they may have kept <p>Parties with sufficient resources might to a survey in key areas to ask which voters have voted in the past and whether they are planning on voting in any upcoming election.</p> <p>However, in some circumstances a party or campaign has no other option but to make a lucky guess.</p> <p>In any case, thinking through and defining the estimated turnout figure is important for making many decisions about campaign strategy.</p>
Year	Type of Election	Turnout																													
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Steps	Description	Type	Min	Note to the Trainer
	<p>The average turnout from the last four parliamentary elections is 70.5%. However, what is more interesting is the trend in voter turnout.</p> <p>Ask participants: in this example, is turnout going up, down, or staying the same? Over the past four elections, it has gone down significantly. The <i>trend</i> is for a decline in the level of voter turnout.</p> <p>Ask participants: What does this mean for all political parties competing for elections in this environment?</p>			
4	<p>Shift the discussion by asking participants to think about what kinds of voters are behind the figures on turnout. In other words if, as in the example above, 70% of the eligible voters are coming out to vote, who exactly are these people?</p> <p>Introduce the terms demographic and geographic and ask participants if they might be able to define them.</p> <ul style="list-style-type: none"> Demographic groups have similar situational characteristics, such as age, gender, religion, education, profession, background, etc. Geographic groups live in or come from the same area <p>Ask: why would these distinctions – demographic and geographic – be important for our discussion on voting trends?</p> <p>Explain that when it comes to politics, people with similar characteristics often behave in a similar way and make similar choices. When it comes to politics, people from similar groups sometimes behave in a similar way or make similar choices. Again, people from similar areas can sometimes make similar choices.</p>	DBR	5	<p>As an illustration of trends among demographic groups, you can give an example of very low turnout among younger voters (18 -29). Ask the participants to tell you how it would influence their campaign if turnout among young people was very low. Would they consider that group as a potentially significant source of support or not? If they say “yes” ask them why and under what conditions.</p>

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	Ask participants to write down at least 3 demographic or geographic groups that are important to their party's electoral success in their area. Discuss how much they know about voting trends among these groups, and whether they are voting to their full potential.			

SECTION 3 – Research and Analysis: Electoral Environment – 10’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Transition to the next topic by explaining that part of strategizing about voters’ behavior involves analyzing the electoral environment.</p> <p>Explain that the electoral environment is the general mood of the electorate about politics, politicians and political parties. Depending on what is going well or going badly in voters’ own lives, in their communities or in the country, the electoral environment tends to favor either maintaining the status quo (returning the governing parties to power) or making a change (supporting parties in the opposition).</p> <p>Explain that the mood of the electorate is like the pendulum on a clock. It can swing from a total desire for everything to change, to a very strong need to maintain the status quo (for nothing to change), or fall somewhere in between. It can change from one election to another and influences voter turnout.</p> <p>Using the pendulum on the flipchart, ask several participants to come up and map where they think the mood of the electorate currently sits on the pendulum by placing a dot or an x anywhere along the arching spectrum between “Change” and “Status Quo”.</p> <p>Remind participants that although our political instincts may be right, it is always good to test what we think against research information to ensure our campaign strategy is sound. Ask the participants what questions they would need to ask to find out more about the electoral environment. Elicit the following:</p>	TP + DBR	10	<p>Draw a pendulum on the flipchart, similar to the one below.</p>  <p>If participants need an example to further understand the influence of the electoral environment on voter turnout, use the following description or make up your own, which describes the current electoral environment in your country:</p> <p>Imagine that people are happy with the current situation and there are no major disappointments and frustrations. In this case people are less likely to seek change, meaning that they may be less likely to pay attention to an election, because they are satisfied with the way things are. Alternatively, higher levels of dissatisfaction and frustration may mobilize more voters to get out and vote for change. The exact outcomes will depend on the dynamics of that particular election.</p> <p>If you have more time and if the group is advanced enough, you can share with the participants short descriptions of each research tool listed. Briefly:</p> <ul style="list-style-type: none"> - Public opinion polls are done scientifically by professional marketing agencies and can be expensive. A party can purchase them if it can afford it.

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> - Are voters excited or motivated by the current election? - Are voters experiencing a high level of disappointment or disillusion? - Are voters angry or frustrated? - Are there security concerns that may inhibit turnout, or political issues that undermine people's faith in the electoral process? <p>Discuss how and where to get independent and credible answers to questions about the electoral environment. Possible research tools include:</p> <ul style="list-style-type: none"> - Academic research - Public opinion polls - Surveys - Focus groups 			<ul style="list-style-type: none"> - Surveys can be conducted by a party or campaign itself. These are basically simple and short questionnaires which party volunteers use to ask voters about their opinions. Though less scientific than polls, they can still provide valuable information. - Focus groups are qualitative research and are usually done by professionals. While polls and surveys give you breakdown of how many people opt for something, focus groups seek to find why it is so. If, for example, a survey finds that 60% of young people (18-29) does not want to vote, focus groups will find out what their reasons are not to vote are. - A campaign's own communications with voters are not as structured as surveys, but these record voters' feedback during direct voter contact. From that feedback a campaign can draw some conclusions about the electoral environment.

SECTION 4 – Setting a Vote Goal – 35'




Steps	Description	Type	Min	Note to the Trainer
1	<p>Start this section by giving the definition of a vote goal: <i>a vote goal is the number of votes a campaign will need to win an election</i></p> <p>Explain and discuss that “victory” or “winning” will have a different definition depending on the party or candidate’s circumstances, and the type of electoral system, but the vote goal is basically the number of votes that gets you to where you want to be on election day.</p> <p>Ask participants what information they would need to estimate a vote goal.</p> <p>Keep in mind that this will change slightly depending on the electoral system in use, but basically the brainstormed list should include the following answers:</p> <ul style="list-style-type: none"> - Number of seats a party is competing for (or wants to win) - Number of voters registered in the voter’s list - Estimated voter turnout - Number of contestants (political parties or candidates) - The rules of the election and how votes are calculated <p>Emphasize that vote goals must be determined for each electoral area separately.</p>	TP + DBR	5	<p>Keep in mind that what counts as “victory” may change for each party and each election. For most candidates, victory means getting enough votes to win their election. However, there are other valid political goals. A presidential candidate may simply be hoping to raise her profile, with the intention of actually winning the next election. A small party may want to pick up only 1 or 2 seats. A larger party may be hoping for an outright majority.</p> <p>Try to help participants define as realistic and relevant sense of what constitutes “victory” for them.</p>

Steps	Description	Type	Min	Note to the Trainer																					
2	<p>Explain the 5 steps to calculating a vote goal. Write the steps on a flipchart as you explain them.</p> <p>1. Identify the number of seats in the electoral area.</p> <ul style="list-style-type: none">Is it a single-member constituency, multi-member shared constituency, or national PR system?How many seats is the party competing for? <p>2. Determine the number of eligible registered voters in the electoral area.</p> <ul style="list-style-type: none">Look at the voter list or register to get this figure.Sometimes you can discover who the registered voters are by looking at lists for distribution of food aid or social benefits. <p>3. Estimate what voter turnout is likely to be for the area.</p> <ul style="list-style-type: none">Voter Turnout is the percentage of eligible, registered voters who turn up to vote on Election Day. <p>4. Based on estimated voter turnout, calculate how many votes it will take to win one seat. This will be different depending on the electoral system.</p> <p>5. The number of votes a campaign will need to capture the number of seats they want to win is the vote goal.</p>	TP	10	<p>It may be helpful to prepare in advance an example with precise figures for the electoral system in which you are working to help participants understand these calculations. Build this section of your training around the electoral system in place in your country and specifically the system being used for any upcoming election, and apply the calculation that matches this system. A guide for common electoral systems appears after the chart below.</p> <p>Here is an example of how to calculate a vote goal that you can use:</p> <table><thead><tr><th></th><th>Number of Seats in the District</th><th>Registered Voters in the district</th><th>Likely Turnout</th><th>Votes Needed for 1 Seat</th><th>Number of Seats we Want to Win</th><th>Vote Goal</th></tr></thead><tbody><tr><td>FPP system</td><td>1</td><td>600,000</td><td>58% (348,000 voters)</td><td>174,001 (348,000 / 2 + 1)</td><td>1</td><td>174,001</td></tr><tr><td>PR closed lists</td><td>6</td><td>300,000</td><td>73% (219,000 voters)</td><td>36,500 (219,000 / 6)</td><td>3</td><td>109,500 (36,500 x 3)</td></tr></tbody></table>		Number of Seats in the District	Registered Voters in the district	Likely Turnout	Votes Needed for 1 Seat	Number of Seats we Want to Win	Vote Goal	FPP system	1	600,000	58% (348,000 voters)	174,001 (348,000 / 2 + 1)	1	174,001	PR closed lists	6	300,000	73% (219,000 voters)	36,500 (219,000 / 6)	3	109,500 (36,500 x 3)
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<p>If you are constructing your own example, here are guidelines for how to do this for common electoral systems:</p> <ul style="list-style-type: none">In First Past the Post (FPP) or plurality systems, the safest way to calculate a winnable seat is to divide the number of estimated voters (projected turnout) by 2 and then add 1 (50% +1). Although there may be more than two candidates in the race, 50% +1 is the only figure that guarantees a win. If, for example, voter turnout is likely to be 100,000 voters, the seat will be won with 50,001 votes (100,000/50,000 + 1 = 50,001).																									





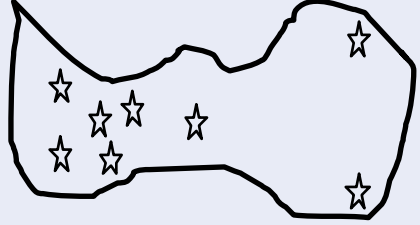
Steps	Description	Type	Min	Note to the Trainer
				<ul style="list-style-type: none"> • In Proportional Representation (PR) systems with closed party lists, divide the number of seats in the district by the projected number of voters. This gives you the threshold for one seat. If, for example, there are likely to be 100,000 valid votes cast and there are 5 seats in the district, then you will need 20,000 votes to win one seat. In calculating a vote goal for PR systems, it is best to estimate these raw figures first before considering any possible remainders. • Block voting systems are calculated in a manner similar to FPP. If a majority of votes must be won in order to carry the district (i.e., if there is a run-off system in place), the only safe vote goal is 50% of the likely votes cast + 1. If it is a plurality system, the winning party will not have to reach this threshold. In this case, the vote goal could be calculated based on the number of likely voters, the number of party tickets in the election, and an assessment of what you will have to do to beat the vote of all the other parties. • In Single Transferable Vote (STV) systems, look at how many votes it will likely take to make quota. Quota is typically calculated by dividing the number of votes cast by the number of seats, then adding 1. If it is unlikely your candidate will make quota, consider which candidates will be disqualified first and whether their votes will transfer to your party. • In PR systems with open lists, calculating a vote goal is directly tied to how votes will be calculated. Projecting a vote goal for this type of system requires a fair amount of research and analysis, looking at past voting trends for your party and the level of popularity and name recognition of individual candidates.

Steps	Description	Type	Min	Note to the Trainer										
2	<p>Divide participants into groups of no more than 5 people. Provide each group with a piece of flipchart paper and a marker.</p> <p>Tell each group that their task is to calculate a vote goal. They can do this for their own party or campaign (based on the necessary data provided by the trainer), or they can use the example below to calculate the vote goal for parties in the fictitious country of Dromora.</p> <p>The parliament of Dromora is elected proportionately in a single national constituency with closed party lists. There are 83 seats in the parliament. The number of registered voters over the age of 18 is 2,500,000. Based on past elections, voter turnout is projected to be about 80% of registered voters for the next general election.</p> <table><tr><th>Party</th><th>Seats in Parliament</th></tr><tr><td>Dromoran People’s Party (DPP)</td><td>42</td></tr><tr><td>Revolutionary Peace and Development Party (RPDP)</td><td>24</td></tr><tr><td>New Democracy Party (NDP)</td><td>11</td></tr><tr><td>Green Party (GP)</td><td>5</td></tr></table> <p>Using these figures, calculate a vote goal for each party in Dromora. You can assume that the DPP wants to win a clear majority, the RPDP wants to take over as the majority party and the NDP and Greens want to double their seats.</p>	Party	Seats in Parliament	Dromoran People’s Party (DPP)	42	Revolutionary Peace and Development Party (RPDP)	24	New Democracy Party (NDP)	11	Green Party (GP)	5	ANK	10	<p>It is important that participants have the chance to practice setting a vote goal. If you have access to the necessary information to do this for your party or candidate and the electoral system, prepare this in advance so that participants can use this information to calculate a vote goal for their own campaigns.</p> <p>If you cannot get the data you need, use the example from the fictitious country of Dromora in the section to the left.</p> <p>Likewise, if the electoral system you are working with does not corresponding with the one assumed in this exercise, feel free to either adapt this one or invent something similar so that participants have the opportunity to practice calculating a vote goal.</p>
Party	Seats in Parliament													
Dromoran People’s Party (DPP)	42													
Revolutionary Peace and Development Party (RPDP)	24													
New Democracy Party (NDP)	11													
Green Party (GP)	5													
3	<p>Ask participants to report their findings and facilitate a discussion if their figures are different, or if they have struggled to understand how to do this.</p>	ANK	10											

SECTION 5 – Voter Targeting: Geographic – 55’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Move into a discussion of targeting by explain that, now that you have your vote goal you need to figure out exactly where you are going to get the votes to reach this number.</p> <p>Explain that, in general, the electorate can be divided into 3 main groups:</p> <ol style="list-style-type: none"> 1. Your core supporters – these are the people who are going to vote for your party or candidate and they will not change their minds before election day 2. Undecided or persuadable voters – these are the people who have not yet made up their minds who they are going to vote for, or are thinking of voting for a different party than the one they supported in the last election 3. Your opponent’s supporters – these are the people who are going to vote for your opponent and they are not going to change their minds before election day <p>Explain that identifying who supports or has the potential to support our campaign is crucial for knowing where limited resources should be spent.</p> <p>Ask participants what portion of a campaign’s resources they think should be directed towards each group. Make the point that most resources should go to persuadable voters, and that money or volunteer time spent campaigning to our opponent’s supporters is wasted.</p>	TP	5	<p>You can help illustrate the how the electorate can be divided by drawing some simple smiley faces on the flipchart:</p> <div>  Your core supporters  Undecided or persuadable voters  Your opponent’s supporters </div> <p>Feel free to use humor as you try to explain and illustrate to participants that they cannot campaign to every voter in the country or region because, sadly, not every voter is going to support our party or campaign. Explain, perhaps, that there are always a number of “poor misguided souls” who haven’t yet figured out that our party or candidate has the best solutions and that we offer them our sympathy but not our campaign’s precious resources.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Explain that a strategically run campaign needs to figure out which voters are in each of these categories so that it knows how to direct its resources. Ask the participants how they might work this out. What would they do to identify who, among all the voters in the country or region, their supporters and potential supporters are?</p> <ul style="list-style-type: none"> - Look for answers such as: looking at the previous elections results, survey research, and any records the party has kept of its communications with voters. <p>Use this discussion to introduce the concept of targeting. Explain that targeting is the process used by campaigns and political parties to figure out which voters are in each of these categories, and most importantly who among the electorate is likely to support our party.</p> <p>Explain that there are generally two types of targeting: geographic and demographic. Explain that with geographic targeting a party identifies where its potential supporters live, and with demographic targeting a party assesses what types of people are likely to support them.</p>			
2	<p>Explain that geographic targeting helps us figure out who are supporters and potential supporters are according to where they live. It is essentially a mapping exercise.</p> <p>Walk the participants through the process of geographic targeting:</p>	TP	10	

Steps	Description	Type	Min	Note to the Trainer
	<p>The most accurate way to conduct geographic targeting is to start by examining the returns from the last similar election. Scrutinize these results by the smallest geographic unit possible (electoral ward is acceptable but polling station is best). Compare how well your party or candidate did in each area compared to the other parties or candidates, and particularly how well it did in comparison to its strongest opponents. Based on these results, categorize each area as one of the following for your party or campaign:</p> <div>  <p>A areas = core supporters</p> <p>In these areas, your party or candidate did very well. These are the areas of your strongest support.</p> </div> <div>  <p>B areas = highly persuadable voters</p> <p>In B areas, the party or candidate is not the strongest one, but you are pretty close to winning these areas and there is good potential for growth in support.</p> </div> <div>  <p>C areas = somewhat persuadable voters</p> <p>In C areas, the party or candidate is not the strongest one, but there is modest potential for growth in support.</p> </div> <div>  <p>D areas = your opponent's base of support</p> <p>In D areas, the party or candidate did poorly. These areas belong to your opponents and should be ignored.</p> </div>			<p>To explain the concept of geographic targeting, you can draw a random map on the flipchart to illustrate what it might look like. For example:</p>  <p>Stars symbolize support in certain areas of the district.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Note that in geographic targeting, undecided or persuadable voters are further divided into 2 categories (B and C) to help the party or campaign figure out with even more accuracy where to spend its resources.</p> <p>Confirm with participants that they understand this process.</p>			
	<p>Divide participants into groups of no more than 5 and provide them with the returns from the most recent similar election or elections. Ask them to identify each geographic area on the returns as an A, B, C or D for the party, candidate or campaign. Allow 10-30 minutes for this exercise, depending on the amount of information groups will have to analyze.*</p> <p>When they have finished, allow one person from each group to report back. Ask them to report how many A, B, C and D areas they have, and how many voters voted in each of these areas in the last election. Discuss the figures and whether, based on this analysis, the party or candidates has enough votes to reach the vote goal discussed in the previous exercise.</p> <p>*NB: If it is not possible to conduct the geographic targeting exercise in this manner, review the other options in the Note to the Trainer.</p>	ANK	40	<p>To conduct geographic targeting, you will need several copies of handouts of the returns from the last similar election (parliamentary if your participants are preparing for a parliamentary election, for example). It is ideal if you can provide one copy per participants so that they can take it with them as resource material. If this is not possible, you will need at least one copy for each team during the exercise. Alternatively, you can find a way to project the information onto a wall or screen with a projector. Be sure it is legible.</p> <p>If you are not able to find or use official election returns, there are other ways you can conduct the geographic targeting exercise:</p> <ol style="list-style-type: none"> 1. Prepare a mock table of election returns based on what you think (or what research tells you) the support for various parties was likely to have been in a recent election. 2. Use maps instead of electoral returns. Provide participants with copies of maps of relevant electoral areas and ask them to mark local areas as A, B, C or D. 3. Draw or copy (as accurately as possible) a map of the relevant electoral area onto the flipchart. Instead of working in small teams, work together as a large group to identify the party or candidate's A, B, C and D areas. Mark these on the flipchart map so that the group can continue to use this as a resource throughout the training and even afterwards.

Steps	Description	Type	Min	Note to the Trainer
				<p>During the geographic targeting exercise, it can be helpful to assign participants to analyze geographic areas with which they are already familiar. If, for example, participants have come to the training from different regions, have them analyze the results from an area in their region.</p> <p>If there are concerns among participants about not having the information they need, suggest that they work with the party's local branches to figure out where the party's support comes from in each locality. Veteran party activists at the local level who have spent long hours speaking to people and working with the local community often have exactly the type of information needed to break down the party's support by neighborhood or even polling station.</p> <p>If the geographic targeting exercise reveals that the party or candidate's campaign does not have enough votes to achieve its vote goal, or even if it has more than enough votes to achieve victory, you can discuss with participants what they think should be done as a result. Conclude by explaining that the other components of this training will discuss the techniques necessary to solidify base voters and persuade undecided voters.</p>

SECTION 6 – Voter Targeting: Demographic 30 ’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Move into a discussion of demographic targeting by explaining that this form of targeting helps us figure out what types of people make up our supporters and potential supporters.</p> <p>Explain that demographic targeting involves dividing the voting population into various groups or subsets of the population. These groups can be based on age, gender, income, level of education, occupation, ethnic background or any other distinct grouping. The basic assumption for demographic targeting is that people from the same demographic group are likely to have similar concerns and, therefore, similar voting preferences.</p> <p>Demographic information can be gathered in one of the following ways or by a combination of ways:</p> <ol style="list-style-type: none"> 1. census information 2. government welfare or food assistance lists 3. local party branches 4. independent research or surveys 5. personal knowledge and experience <p>Discuss with participants what types of information each of these sources might provide, what sources of demographic information they have access to, and what other sources might be available. Make a list of these on the flipchart and discuss which would be the best for participants to use.</p> <p>Ask participants to think through some of the demographic groups which are more likely to support their party or candidate. Brainstorm a list of 3-5 demographic groups on the flipchart and discuss why each of these is likely to be supportive. Then, ask participants (as a large group or in teams) to list 3 common concerns for each group.</p>	TP + DBR	10	<p>Use the discussions in this section to help ensure participants understand what a demographic group is and what it might look like. Reinforce the point that it's important to avoid defining too groups that are too large or too small.</p> <p>For example, women, who make more than a half of the electorate in most countries, are a very large group. If the campaign is looking to target women, this should be broken up a bit more to define life circumstances, age, type of work they do, likely level of income, interests, etc.</p> <p>Similarly, guide participants so that they don't look to groups that are too small, such as teachers of math in primary schools or left-handed violin players. Focusing on groups that are too small can waste resources because they don't make a significant contribution to achieving your vote goal.</p>

Steps	Description	Type	Min	Note to the Trainer
2	<p>Ask participants to return to the groups they were in for geographic targeting. Provide each group with a piece of flipchart paper, a marker, and demographic information for the same areas for which they conducted geographic targeting.</p> <p>Ask each group to review the demographic information you have given them and come up with a list of 3-5 new things they have learned about the people who live in this area which would be useful for their campaign strategies. Guide participants to think of what the general age, education, local economy, housing and similar situations means for what political issues would be important to voters in this area.</p> <p>Allow 15-20 minutes for this analysis, then invite each group to present their work. Discuss their findings and ask them to explain how this information would be useful to their campaigns.</p>	TP + DBR	10	<p>Finding demographic information in a user-friendly format can be tricky. Census information is the best source for demographic targeting since, if it is recent, it is likely to be reliable and should be easy to apply to the geographic targeting you have already conducted. Voting districts and census data are typically organized using the same geographic boundaries.</p> <p>However, census information can also be difficult to decipher if participants haven't used it before. In this case, study the information in advance to ensure you understand it and guide participants in reading it before they do the exercise. As a larger group, answer questions like:</p> <ul style="list-style-type: none"> • Are there more men or more women? What are the political implications of this? • What is the dominant age group? What are the political implications of this? • How do people here make a living? Is it a good living? Can they afford to take care of their families? • What does the data tell you about how people in this area get their information? Can people read (both men and women)? Do they have reliable access to electricity? Based on these statistics, are voters most likely to rely on TV, radio, newspapers, community meetings, etc.? • What are the educational levels of the area? What are the literacy levels for the area? Are they different for women and men? How would that affect how you communicate with voters in this area? • What do you think are the most important issues to voters in this area?

Steps	Description	Type	Min	Note to the Trainer
				<p>If you are unable to access useable or reliable demographic information, have participants return to the groups with which they conducted the geographic targeting exercise, and ask them to think through the 6 questions above for a sample of their A and B areas (they can do C as well if there is sufficient time) based on their personal experience and knowledge of the area.</p> <p>If participants cannot answer questions about demographics in these areas based on their own experience and knowledge, use this as an opportunity to reinforce the point about the importance of research and analysis in formulating a campaign strategy. If it is appropriate, assign the task of researching the demographics in key areas as “homework” and give participants a deadline and assign a person to get back to you with the completed task.</p>

CONCLUSION – 3’

Summarize the session:

- Running a winning campaign is not about having the most resources; it is about using what you have effectively and strategically.
- You need to know how many people are expected to vote and who these voters are in order to set a clear goal for an election. This is why we look for trends in voting behavior and in the electoral environment.
- You need to define what “winning” will look like for your campaign so that you know what you are working towards. A vote goal is the number of votes you will need to win.
- Geographic and demographic targeting are crucial strategic tools that can help you find supporters and persuadable voters. They are all about using your resources wisely, by getting the right message to the right people.

Campaign Skills Trainer's Guide

Module 4 Voter Contact *Communicating Directly with Voters*



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 4: VOTER CONTACT *Communicating Directly with Voters*

SESSION OVERVIEW:

This module introduces participants to various voter contact methods. Participants learn how to assess different types of voter contact methods according to how effective they are and how much they require in terms of financial or human resources. Participants also review best practices for these methods within the context of their particular operating environments.

NB: To cover this topic comprehensively can take a significant amount of time. Therefore, there are two options for how to conduct this training. For the *Get Out the Vote* and *Building a Voter Contact Plan* segments, there is a Version A and a Version B. In both cases, Version A is a more detailed exploration of the topic and as a result takes longer to complete. Version B is shorter but still covers the main points. Trainers should choose between these options based on how much time they have, what they need to accomplish and the capacity of their audience. Trainers further pressed for time is to skip *Tracking Voter Contact Results* (section 4), *Get Out the Vote* (section 5) and *Voter Contact Planning* (section 6).

SECTIONS:

1. Voter Contact Methods
2. Assessing Voter Contact Methods
3. Canvassing
4. Tracking Voter Contact Results
5. Get Out the Vote and Obstacles to Voting (Versions A and B)
6. Voter Contact Planning (Versions A and B)

LEARNING OBJECTIVES:

- Understand the distinctions between our supporters, our opponent's supporter and persuadable voters
- Identify and describe various methods of voter contact
- Assess the effectiveness of different voter contact methods
- How to build a voter contact plan (remove if not covering Voter Contact Planning)

TIME: 305 minutes (using Versions A), 235 minutes (using Versions B) or 185 minutes (minus sections 4, 5 and 6)

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (can be written on the flipchart)

HANDOUTS:

- Appendix 1, Sample Voter Contact Plan (only if you are using Version A of the training)
- Appendix 2, Voter Contact Plan Form (only if you are using Version A of the training)

PREPARATION:

Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. Common voter contact techniques:

- Posters and Banners
- Public or Community Meetings
- Festivals and Rallies
- Billboards
- Leaflets and Brochures
- Phone calls to voters
- Newspaper Advertisements
- Discussions with Community Leaders
- Social Media Campaigns (e.g., Facebook fan page)
- Policy Manifestos
- Press Releases
- Radio Advertisements or Paid Air Time
- Door-to-Door Canvassing
- T-shirts, Hats and Other Merchandise
- Plays, Shows and Local Theatre
- Website
- Television Advertisements or Party Political Broadcasts
- Internet Videos
- Email and SMS

4. Universal Principles of Voter Contact:

Universal Principles of Voter Contact

personal voter contact = persuasive voter contact

targeted voter contact = bigger return and better results

hot techniques = less money but more people needed

door-to-door canvassing = highest impact voter contact method

every campaign = a combination of hot and cold techniques

5. Impact vs. Effort: Assessing Voter Contact Methods (one per group plus a trainer's version with examples of methods):

Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency

6. Canvassing

CANVASSING:

- Highest impact of any form of voter contact
- Most personal voter contact technique
- Best method for figuring out who a campaign's supporters actually are
- Builds and strengthens relationships with voters
- Brings a party closer to citizens
- Creates opportunities for campaigns to test their message

7. Canvassing

FOR CANVASSING YOU WILL NEED

- Many volunteers
- Voters list
- Maps of the area being canvassed
- Briefing materials
- Campaign literature
- Voter contact cards
- A script for volunteers
- Promotional materials

8. Canvassing Scripts

CANVASSING SCRIPTS SHOULD:

1. Be short
2. Be clear
3. Allow for two-way communication
4. Begin and end with the name of the party or candidate

9. Canvassing Scripts

STRUCTURE FOR CANVASSING SCRIPTS

1. Greeting
2. Statement of Identity
3. Statement of Purpose
4. Question 1
5. Message
6. Question 2
7. Message
8. Anything Else?
9. Identity, Message and Contact Information

10. Tracking Voter Contact Results

Sample Voter Contact Card

Voter's Name: _____
 Address: _____
 Polling District: _____
 Contact Phone: _____
 Contact Email: _____
 Party Affiliation: _____
 Registered to Vote? ☐ yes ☐ no
 Planning to Vote? ☐ yes ☐ no
 Voting Intention: 1 2 3 4 5 R X

Needs:

More information
 Absentee Ballot
 Ride to Polls
 E-Day Child Care

Will support the campaign by:

Volunteering
 Canvassing
 Working to Get Out the Vote
 Making donation

Additional Information / Issues: _____

Voting Intention Key: 1 = supporter, 2 = leaning toward candidate,
 3 = undecided, 4 = leaning toward opponent, 5 = supporting opponent,
 R = refused to answer, X = not at home

11. Voter Contact Planning (Version B only)

Method	Target Voters	How Many	When	Resources

KEY FOR THE TYPES OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises







DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – Voter Contact Methods – 40'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session by explaining that we will be discussing the most effective ways to communicate with voters. Review the learning objectives.	TP	1	
2	<p>Explain that, in general, the electorate can be divided into 3 main groups:</p> <ol style="list-style-type: none"> 1. Your core supporters – these are the people who are going to vote for your party or candidate and they will not change their minds before election day 2. Undecided or persuadable voters – these are the people who have not yet made up their minds who they are going to vote for, or are thinking of voting for a different party than the one they supported in the last election 3. Your opponent's supporters – these are the people who are going to vote for your opponent and they are not going to change their minds before election day <p>Ask participants: Why do we need to recognize these three categories? Why is it important?</p> <p>Look for answers that suggest that electoral campaigns are about persuading undecided voters and mobilizing supporters our supporters; all our resources and efforts should be focused on them.</p> <p>Emphasize that a campaign never attempts to attract and persuade its opponent's supporters. Remind participants that, by definition, these voters will not change their minds to support your opponent and any resources spent trying to do so will be wasted.</p>	TP	3	<p>You can help illustrate the how the electorate can be divided by drawing some simple smiley faces on the flipchart:</p> <div>  Your core supporters  Undecided or persuadable voters  Your opponent's supporters </div> <p>And at the end, when saying that we do nothing with our opponent's supporters scratch out the last one (to visualize your point), like this:</p> <div>    </div>

Steps	Description	Type	Min	Note to the Trainer
3	<p>Move to a brainstorming exercise. Divide participants into groups of not more than 5. Provide each team with a piece of flipchart paper and a marker. Assign the following task: list all methods and techniques your party or campaign uses to communicate with voters. Give 10 minutes to the participants to get into groups and to do the exercise.</p> <p>Have each group quickly present their list. Write down what they have come up with on the flipchart paper, avoiding duplication when different groups come up with the same answer. Then, reveal the list of voter contact techniques you have prepared in advance and identify those which the groups have come with that were on your list, and add any which were not.</p> <p>Review the techniques listed on the comprehensive list. Go through the list and ask participants to define or describe what each technique is, skipping the more obvious ones (like t-shirts and hats).</p>	PEE	15	<p>Have all or some of the following common voter contact techniques written in advance on the flipchart, but do not reveal this until after the groups have reported their brainstormed lists:</p> <ul style="list-style-type: none"> - Posters and Banners - Public or Community Meetings - Festivals and Rallies - Billboards - Leaflets and Brochures - Phone calls to voters - Newspaper Advertisements - Discussions with Community Leaders - Social Media Campaigns (e.g., Facebook fan page) - Policy Manifestos - Press Releases - Radio Advertisements or Paid Air Time - Door-to-Door Canvassing - T-shirts, Hats and Party Merchandise - Plays, Shows and Local Theatre - Party Website - Television Advertisements or Party Political Broadcasts - Internet Videos - Email and SMS <p>Once you have built a comprehensive list, use the review of each technique to ensure participants have a clear understanding of what each of these techniques actually are and how they work.</p>

Steps	Description	Type	Min	Note to the Trainer
4	<p>Ask each group to share those techniques on the comprehensive list which were not on their original lists. Discuss why they were not on their original lists and whether this is something they think the party or campaign should use.</p> <p>Likely answers include: we just didn't think of it but we do it, we don't have the resources to do that, or that would never work here. There may be confusion or misinformation about what types of techniques are legal.</p> <p>Facilitate a brief discussion about why political parties and campaigns chose the voter contact techniques they use. Guide participants to think about whether what they're doing is effective, whether new ideas could potentially work as well as what they're doing now or perhaps even better. Use this discussion to dispel any misinformation about what is legal and culturally acceptable, and what is not.</p> <p>At the end, conclude that the type of voter contact methods a campaign uses in an election depends on a number of factors. Use the chart in the Notes to Trainers column as a reference and add any additional factors raised by participants.</p>	PEE + DBR	15	<p>Very often, some voter outreach techniques are dismissed by participants as culturally unacceptable or illegal, when in fact they have just never been used before. This is often the case with personal forms of voter contact, particularly door-to-door canvassing which is the most effective technique with the greatest impact on voters.</p> <p>It is important that as a trainer you have fully researched and are aware of what the legal requirements and restrictions are on communicating with voters, especially outside of the official election period, so that you can dispel any myths or address any misunderstandings about this among participants.</p> <p>The following list of factors influencing what voter contact methods a campaign uses may be useful to you in the facilitated discussion. You can use this as a reference for debriefing the discussion by writing it on the flipchart and adding any other points raised by participants.</p> <ul style="list-style-type: none"> - what types of activities are legal and culturally acceptable - the size of the total targeted voting population your campaign is trying to reach - the number of voters your campaign is trying to persuade to support it - whether the landscape is more urban or rural, and how closely people live to one another - local feelings about politicians and political leaders - the campaign's financial and human resources - the security environment - what is likely to have the greatest impact

SECTION 2 – Impact vs. Effort: Assessing Voter Contact Methods – 85'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain that each voter contact technique listed has different impact on a voter.</p> <ul style="list-style-type: none"> - Some methods have a lasting impact. Voters may be thinking about the communication hours later or even discuss it with other people. - These are called HOT methods. - Some methods a fleeting impact on the voter. They are forgotten quickly. - These are called COLD methods. <p>Have the participants stay in the same groups and assign the following task: Arrange the outreach methods your group has listed from the HOTTEST (highest impact on the voter) to the COLDEST (lowest impact on the voter). Give 5 minutes for this exercise.</p> <p>Ask one of the groups to share only the hottest technique and ask other groups if they have the same one. If all the groups have door-to-door canvassing as the hottest one proceed to next question. If the hottest techniques are different for different groups spend some time facilitating a discussion about why the groups have chosen what they have.</p> <p>The next question for the groups is what they have listed as the coldest technique. After they give you their answers, move the group towards drawing a conclusion about what makes an outreach method hot or cold. The answer you are looking for is: the more personal the technique, the more persuasive, or hot, it tends to be.</p>	TP + DBR	30	<p>Basic principles when it comes to assessing the impact of voter contact are outlined below. Write the summary from this box on the flipchart and use this to conclude the facilitated discussion about what is hot and what is cold when it comes to voter contact.</p> <div> <p>Universal Principles of Voter Contact</p> <p>personal voter contact = persuasive voter contact</p> <p>targeted voter contact = bigger return and better results</p> <p>hot techniques = less money but more people needed</p> <p>door-to-door canvassing = highest impact voter contact method</p> <p>every campaign = a combination of hot and cold techniques</p> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Show participants the Universal Principles of Voter Contact flipchart (outlined in the Notes to Trainers column) and use the briefing information below to walk participants through each of the points on the flipchart in more detail:</p> <ul style="list-style-type: none"> • The more personal the technique, the more persuasive, or hot, it tends to be. Hot techniques are largely more personal and more direct forms of communication, in which the target voters and candidates (or campaign volunteers) are physically present in the same space. These techniques also give the voter an opportunity to talk back, so it is a two-way conversation or dialogue, rather than just a monologue with only the party or candidate getting a chance to speak. • The more targeted a technique is, the bigger the return for the campaign. It can be important for the campaign to host a hospitality tent or give out sweets at a local festival, for example. But if it is unclear whether the voters at the festival are the campaign's targeted voters, then the impact and return for the campaign's work will be lower. The more voter contact can be designed around communicating directly with target voters, the more effective it is going to be. • Hot techniques are less expensive than cold techniques. Community meetings and canvassing, for example, cost very little to put together. However, they require more time and more people to organize and implement and so planning and recruitment for these has to start earlier. 			

Steps	Description	Type	Min	Note to the Trainer																																				
	<ul style="list-style-type: none">Worldwide, door-to-door canvassing is the technique that tends to have the highest impact. Because it is extremely personal and can be conducted directly with target voters, canvassing by meeting voters in their homes tends to be the hottest form of voter contact.Finally, remind participants that this does not mean their campaigns should abandon all cold techniques. Almost every electoral campaign will be made up of a combination of hot and cold techniques. Good strategy is about tying your voter contact planning to your vote goal and choosing the activities that will get you there.																																							
2	Move to the next phase of your analysis of voter contact methods by explaining that voter contact techniques can be assessed not only by their impact (HOT vs. COLD, which you have just done), but also by their effectiveness. Effectiveness is defined by the ratio between resources and return (or results). In other words, how much work or effort will the campaign have to put in to get the full impact of using a particular technique?	DBR + PEE	30	Draw copies of the following chart on pieces of flipchart paper in advance of the training. There should be one copy per group of up to 5 people. So, for example, if you expect 25 people to attend the training, you will need to make 5 copies of this chart on separate pieces of flipchart paper, 1 for each group of 5 people																																				
	Ask the participants what factors they would need to consider when assessing the effectiveness of a voter contact method.			<table><tr><th>Method</th><th>Financial Cost</th><th>Volunteers</th><th>Time and Planning</th><th>Impact</th><th>Efficiency</th></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>	Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency																														
	Method		Financial Cost	Volunteers	Time and Planning	Impact	Efficiency																																	
Elicit (or list and explain) the following:																																								
<ul style="list-style-type: none">Financial cost in terms of money or other material resourcesVolunteers or human resources neededTime and planning neededImpact (hot or cold)Efficiency (how many voters can be reached at one time)		Additionally, you will need to draw a copy for yourself to use when presenting the chart. The trainer’s version should include examples of different voter contact techniques in the “Methods” column, like the one below. Feel free to use whatever techniques are most relevant to your participants.)																																						

Steps	Description	Type	Min	Note to the Trainer					
	<p>Ask the participants to return (or stay in) their groups. Ensure each group has a fresh piece of flipchart paper and a marker.</p> <p>Reveal the trainer's version of the chart for assessing voter contact methods which you have prepared in advance, with examples of voter contact techniques listed in the "Method" column.</p>			Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency
				Canvassing					
				Community Meetings					
				SMS					
				Banners					
	<p>Explain to participants that the purpose of the chart is to provide an assessment of various voter contact methods, based on the amount of work a campaign will have to do in comparison with the likely impact of the technique.</p> <p>Explain to participants that, after listing the relevant voter contact methods they will be using in the first column, each method is then rated on a scale of 1 to 5, with 1 being lowest and 5 being highest, for the 5 categories listed: financial cost, volunteers, time and planning, impact, and efficiency.</p> <p>Walk participants through one or two examples. For example, a voter contact technique which requires a lot of volunteers would get a 4 or 5 rating in the "Volunteer" column. A voter contact technique that is expensive would get a 4 or 5 in the "Financial Cost" column. A voter contact technique that could only reach a few voters at a time would get a 1 or 2 in the "Efficiency" column. A voter contact technique that is easy to organize and doesn't take much planning would get a 1 or 2 in the "Time and Planning" column.</p>			<p>As with the previous exercise, the assessment of each technique – particularly impact and efficiency – may depend on local factors. It is fine for groups to have different answers from each other and from the trainer, as long as they can fully and credibly explain their answers. In general, guide and redirect participants towards the Universal Principles from the previous section and ensure that the core point of personal voter contact having the highest impact is well understood.</p> <p>The key to this section is to help participants see the value in selecting voter contact techniques that will deliver targeted results for the campaign, and which can be implemented effectively with sufficient resources, and to ensure that they are thinking these things through <i>strategically</i>, and not just doing something because that's the way they've always done it.</p>					

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	<p>Provide groups with copies of the blank chart you made on flipchart paper in advance of the training. Instruct participants that their task is to list at least 6 of the voter contact methods from their brainstormed list in the “Method” column (the ones on the trainer’s chart are just an example; they do not have to use these if they are not on their lists), and then rate them according to financial cost, volunteers, time and planning, impact and efficiency.</p> <p>Ensure the participants understand the task and give them 15 minutes to complete it.</p> <p>Let each group present their findings. Discuss any differences in how similar techniques were assessed and ask participants to fully explain any conclusions which appear illogical or which differ significantly from the assessments of others.</p> <p>Conclude by making the point that the question for every campaign is whether they can afford, in terms of time, money and volunteers, to implement the voter contact methods that would best suit their goals. And, if they don’t have sufficient resources to hand, whether they are in a position to raise or recruit these resources.</p>			

Steps	Description	Type	Min	Note to the Trainer
3	<p>Ask participants to return to (or remain in) their groups. Provide each with flipchart paper and markers.</p> <p>Instruct the groups to draw 2 columns on a piece of flipchart paper.</p> <p>In the first column, participants should write down 3-5 voter contact methods their campaign or political party will use in the next election. Their choices should be based on the assessment of these activities they conducted in the previous exercise.</p> <p>In the second column, participants should write down what targeted voters (A, B, C or D voters from their geographic targeting or specific demographic groups from demographic targeting) they will communicate with using each method. Clarify that each method can be used for more than one set of targeted voters (canvassing can be used for both A and B voters, for example).</p> <p>Let the groups present their conclusions and ask them to explain why they have made those choices.</p> <p>Give 15 minutes for the group work and 10 minutes for presentations, debrief and discussion.</p>	PEE + ANK	25	<p>Instruct groups to really think through their decisions in this exercise and to hold onto their work. If you are delivering the final section on Voter Contact Planning, participants will use what they come up with here for the exercise in that section.</p> <p>NB: If participants also conducted the geographic and/or demographic targeting exercise from Module 3, they may have figures for the number of A, B and C voters they are targeting, as well as estimates for various demographic groups. If participants have this information, encourage them to include it as a third column in this task.</p>

SECTION 3 – Canvassing – 55’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce canvassing:</p> <p>Canvassing is a form of systematic and personal communication between an electoral campaign and target voters. It is typically practiced by candidates, political party representatives and volunteers going from home to home in a priority area and talking with voters about the election.</p> <p>Offer more context for canvassing by explaining the points below. You can have Chart 1 from the Notes to Trainers column prepared in advance for this discussion:</p> <p>Among every form of voter outreach, canvassing is the activity with the highest impact and highest return. It is far more personal than most forms of voter contact and is more likely to be a rewarding and valuable experience for both the campaign and the voter. Canvassing allows the campaign or party to:</p> <ul style="list-style-type: none"> ✓ Identify more precisely where its areas of support are and make sure these voters are registered to vote and likely to vote on Election Day ✓ Build or strengthen the relationship with base (A) and persuadable (B and C) voters ✓ Demonstrate to voters that the campaign or party is active, engaged and concerned about the citizens ✓ Test its message and get a better sense of what issues are important to voters <p>Explain that there are two types of canvassing:</p> <ol style="list-style-type: none"> 1. Survey Canvassing – In a survey canvass, a political party or candidate goes directly to voters to find out what issues are most important to them and learn about their impressions of the party. A survey canvass is typically conducted well in advance of an election, or in between elections. 	TP	15	<p>This section focuses more on how to actually conduct canvassing, because it is such a high impact activity in terms of voter contact.</p> <p>To help participants remember the main points about canvassing and understand the context for this activity, you can have following written on the flipchart in advance:</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>Chart 1</p> <p style="text-align: center;"><u>CANVASSING:</u></p> <ul style="list-style-type: none"> • Highest impact of any form of voter contact • Most personal voter contact technique • Best method for figuring out who a campaign’s supporters actually are • Builds and strengthens relationships with voters • Brings a party closer to citizens <p style="text-align: right;">Creates opportunities for campaigns to test their message</p> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>2. Persuasion or Electoral Canvassing – In a persuasion or electoral canvass, a political party or its candidate visit local voters to communicate a campaign message, persuade voters to vote for them, and find out how voters are planning to vote.</p> <p>For the purposes of our discussion in this training, we will focus on Persuasion/ Electoral Canvassing.</p> <p>Make the point that although canvassing can be a hot method (high impact), it is also an activity that requires a lot of planning and a lot of volunteers (high effort).</p> <p>Ask participants: If you were going to go from home to home in your local community to talk to voters, what types of materials or preparation do you think you would need?</p> <p>Make a list of participants' ideas on the flipchart. Debrief the list and guide participants towards the answers below. (You can have a short list prepared on the flipchart in advance.) In order to conduct canvassing activities, a campaign team will need:</p> <ul style="list-style-type: none"> ● Plenty of volunteers – in many countries, especially in areas where there has been conflict, voters are more comfortable, and therefore more responsive, if at least one of members of a canvassing team is female ● A copy of the voters list for the area that is being canvassed (a list of registered voters in the area) ● A street map or boundary map of the area to be canvassed ● Briefing materials to prepare canvassers for common or difficult questions about the party, candidate, policies or political stances 			<p>As you are going through what campaign needs to conduct canvassing activities, you can have following notes written on the flipchart in advance:</p> <div> <p>Chart 2</p> <p><u>FOR CANVASSING YOU WILL NEED:</u></p> <ol style="list-style-type: none"> 1. Many volunteers 2. Voters list 3. Maps of the area being canvassed 4. Briefing materials 5. Party literature 6. Voter contact cards 7. A script for volunteers 8. Promotional materials </div>

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> Party or campaign literature with contact information Feedback forms or some mechanism to collect information about voters' political support and issues of priority, as well as to collect the details of voters who wish to volunteer or donate for the campaign A script for canvassers so they know what to say to voters and what information to collect Badges, hats, t-shirts or other campaign paraphernalia that make it clear who volunteers are with and support the campaign's branding efforts (if this is safe to wear in public) <p>Make the following points as well:</p> <ul style="list-style-type: none"> Canvassing is best if done in pairs so that one person can engage the voter and one person can write down the voter's response; depending on local sensitivities, it is usually best if at least one of the canvassers is female as voters tend to find this less intimidating. Canvassers should be instructed not to engage in arguments with voters, to treat all voters with respect and to walk away politely if a discussion gets heated. 			
2	<p>Ask participants to think about what they would actually say once they arrive at the home of a voter (who they probably won't know personally) to ask them to vote for their party or candidate. How would it be possible to start such a conversation?</p> <p>After briefly discussing their ideas, explain to participants that it is important to provide canvassers with a good script so that they know exactly what to say and so that all canvassers are delivering the same message.</p>	TP + DBR	10	<p>Write short instructions for the characteristics of a good canvassing script on the flipchart:</p> <div> <p>Chart 1</p> <p><u>CANVASSING SCRIPTS SHOULD:</u></p> <ol style="list-style-type: none"> Be short Be clear Allow for two-way communication Begin and end with the name of the party or candidate </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Guide participants through a discussion of what makes a good canvassing script (use Chart 1 from the Notes to Trainers column): A good canvassing script helps prepare campaign volunteers to engage with voters, and ensures that all party activists are delivering the same message. Canvassing scripts:</p> <ul style="list-style-type: none"> • Should take a small amount of time • Use simple language or even pictures in order to communicate effectively with voters • Should allow for a two-way conversation to demonstrate that the party or candidates are not there just to talk, but also to listen • Begin and end with the name of the party or candidate being said by canvassers so they are more likely to remember you were there <p>Ask participants to give their ideas of what this might look like and what they might say. Have them think through strategic questions that they need to consider, including:</p> <ul style="list-style-type: none"> • Will voters have any concerns about being directly approached by representatives from a campaign? If so, what do you need to say or do to put them at ease? • How do you think the voters would like to be greeted? What should you say to them? • What do you need to ask voters? What information do you need most (e.g., key issues, voting intention, whether or not they're registered, etc.) to build an effective campaign strategy and make sure you're communicating effectively with target voters? • How will you incorporate your campaign's message? 			<p>During the discussion on how to write a canvassing script, use the following structure to help guide participants:</p> <div> <p>Chart 2</p> <p><u>STRUCTURE FOR CANVASSING SCRIPTS</u></p> <ol style="list-style-type: none"> 1. Greeting 2. Statement of Identity 3. Statement of Purpose 4. Question 1 5. Message 6. Question 2 7. Message 8. Anything Else? 9. Identity, Message and Contact Information </div> <p>During the discussion on canvassing, it can be useful to make the point about the importance of preparing and training volunteers or party activists who are going to engage in this activity. Parties and campaigns usually train canvassers to ensure that they are confident in the technique, that everyone is delivering the same message, and so that they all know how to deal with any questions or problems that might arise. This type of training typically takes an hour or two and can be run in a similar fashion to the training currently being conducted.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>After discussing these questions for a few minutes and soliciting some answers, use participants' ideas to begin to write a mock script on the flipchart. Guide participants toward a structure similar to the following (use Chart 2 from the Notes to Trainers column):</p> <ol style="list-style-type: none"> Greeting – be polite Statement of Identity – who are we? Statement of Purpose – why are we here? Question 1 – ask the voter a question about the election, their concerns or priorities to begin a conversation Message – connect the party or candidate's message to the voter's concerns Question 2 – ask the voter another question about the election, whether or how they plan to vote, or what's important to them Message – reinforce the party or candidate's message Anything Else? – ask the voter whether there are any other points they would like to make Information – again, remind the voter of your party or candidate, what you are trying to achieve in the election, and how they can reach you for more information or to get involved 			
3	<p>Ask the participants to work with their team members and write a script for a persuasion or electoral canvass for the upcoming election. Give 15 minutes for this activity.</p> <p>After they have finished their draft, ask each group to select two people to be canvassers. They will test the script in front of all the participants with an A, B or C voter.</p>	ANK	40	<p>Give each group no more than 3 minutes to test their scripts to reinforce the point that a canvassing script should be brief. Either a participant from another group or the trainer can take on the role of the voter. If it is a participant, whisper in his or her ear whether they are an A, B or C voter so that the canvasser cannot hear. This should give them some guidance about how enthusiastic or cautious they should be about the canvassers' message.</p>

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	Briefly discuss and debrief the scripts after each team has presented. Allow participants to offer constructive feedback on what worked and what didn't before offering your own as a trainer. Ensure the positive aspect of each groups' work are highlighted.			It can be intimidating for some participants to stand in front of a room of their peers and act out a script, so be encouraging and ensure the positive aspects of their work are highlighted during the feedback session. Offer particular praise to whatever group agreed to go first.

SECTION 4 – Tracking Voter Contact Results – 15'

Steps	Description	Type	Min	Note to the Trainer										
1	<p>Introduce the concept of recording voter contact results and explain its importance:</p> <p>Throughout all of this challenging and energizing work communicating directly with voters, it is vital that you keep track of what voters are saying to you. The beauty of direct voter contact is that it often provides the opportunity to engage in two-way communication, so that not only can you deliver your message to voters but they can tell you what they think of that message, of you as a candidate, of your party and of the issues that are important to them.</p> <p>This information is invaluable to electoral campaigns. But to benefit from it, you have to keep track of it and pay attention to what it is telling you.</p> <p>Ask the participants to consider the Sample Voter Contact Card on the flipchart. Explain that this can be used to collect information about what campaign activists, candidates and volunteers are hearing from voters during canvassing, community meetings or any interaction a campaign has with voters. It can also be used to help a campaign understand more about its supporters and potential supporters and who they are, which will be extremely useful in both the short and longer terms.</p> <p>Explain that these forms can also be used to identify potential volunteers or to determine who might be able to provide financial or material support to the campaign, as well as to track priority issues among target voters.</p> <p>Without spending too much time on each, walk through the information fields on the card and explain why these are included.</p>	TP + DBR	20	<p>The purpose of this brief session is to help participants understand the importance of collecting information about voters and their feedback, and that this has to be organized and systematic. Having volunteers or party activists report their findings and impressions without having a clear structure or standard form can create misunderstandings or misinterpretations of what voters are saying. This is why a party or campaign has to develop a unified form and train volunteers on how to use it.</p> <p>Have the sample of the voter contact card prepared on the flipchart in advance:</p> <div><p><u>Sample Voter Contact Card</u></p><p>Voter’s Name: _____</p><p>Address: _____</p><p>Polling District: _____</p><p>Contact Phone: _____</p><p>Contact Email: _____</p><p>Party Affiliation: _____</p><p>Registered to Vote? yes no</p><p>Planning to Vote? yes no</p><p>Voting Intention: 1 2 3 4 5 R X</p><table><tr><td>Needs:</td><td>Will support the campaign by:</td></tr><tr><td>More information</td><td>Volunteering</td></tr><tr><td>Absentee Ballot</td><td>Canvassing</td></tr><tr><td>Ride to Polls</td><td>Working to Get Out the Vote</td></tr><tr><td>E-Day Child Care</td><td>Making donation</td></tr></table><p>Additional Information / Issues: _____</p><p>_____</p><p>_____</p><p>Voting Intention Key:</p><p>1 = supporter, 2 = leaning toward candidate, 3 = undecided, 4 = leaning toward opponent, 5 = supporting opponent, R = refused to answer, X = not at home</p></div>	Needs:	Will support the campaign by:	More information	Volunteering	Absentee Ballot	Canvassing	Ride to Polls	Working to Get Out the Vote	E-Day Child Care	Making donation
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<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	<p>Ask the participants to think what other types of information they may need to build a relationship with voters, or what other suggestions they might have for using the information.</p> <p>Ask them to explain their ideas. Modify the Sample Voter Contact Card to integrate their suggestions.</p> <p>Once you have modified the Sample Voter Contact Card to accommodate participants' suggestions, explain that after it is collected, the information on these cards should be brought back to the campaign or party headquarters, where it is entered and tracked in a database of voter information. If the campaign is collecting and monitoring this information effectively, it should provide a fairly clear map of where the party or candidate should expect support on election day, and where the campaign should be focusing its efforts.</p>			<p>During this discussion, some participants may raise concerns about voters not being comfortable or willing to share information, particularly political opinions. This is not uncommon, particularly in situations where there has been political instability or violence, or where there are higher levels of political uncertainty.</p> <p>Address this point by reassuring participants that their concerns are valid. However, much of this is about how you ask these types of questions and the integrity with which you protect and use this information.</p> <p>Encourage participants to think carefully about what they really need to know and to find ways to ask about these things without making voters feel uncomfortable or anxious. For example, if voters do not want to say who they are planning to vote for, you can ask them what issues are most important to them and which party or candidates they think is doing the best job on these issues, rather than asking them outright who they are voting for.</p> <p>It is also important that a party or campaign conveys the message and the impression that this information is being collected so that it can respond better to the needs, ideas and concerns of citizens, rather than for any untoward purposes.</p>

SECTION 5 – Get Out the Vote and Obstacles to Voting (Version A) – 40’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce Get Out the Vote and explain what the term means:</p> <p>The final effort a campaign has to make is to ensure that all those voters who expressed their support actually cast their ballots on election day. This work is called Get Out the Vote (GOTV), and it is a key component of every voter contact plan.</p> <p>Explain that GOTV is all the activities that a campaign conducts towards the end of the campaign period and on election day to ensure that its supporters actually show up at their polling place and cast their ballot.</p> <p>Stress that while voter contact efforts in the weeks and months prior to an election target mainly undecided and highly persuadable voters, GOTV targets only those voters who are or who have become supporters. This is exactly why the voter contact record (discussed in the previous section) is so important and for this phase. A campaign that does not record voter support is not able to track its voters individually, which means it cannot contact or mobilize them on election day.</p> <p>Ask the participants how they think GOTV can be done and what types of activities they think will be most effective. Brainstorm a short list and write participants’ ideas on the flipchart.</p> <p>Debrief the list by saying that the actual techniques used for GOTV will depend on the local environment, election law and campaign culture, but that typical methods include:</p> <ul style="list-style-type: none"> ● Door-to-door canvass ● Phone banks ● SMS and mobile phone messaging ● Persuasion literature drops 	TP + DBR	15	<p>It is important in this section to reinforce the point that it does not matter how many voters say they are going to support your party or candidate; what matters is how many voters actually do this (get out and vote for your party or candidate).</p> <p>Additionally, ensure that participants understand that GOTV efforts are never for all the voters, because a party or campaign risks mobilizing its opponent’s supporters this way. GOTV activities must be targeted to connect directly with a campaign’s own supporters.</p> <p>During the discussion on what types of activities will be most effective, keep in mind that the activities typically used for GOTV are exactly the same or similar to those used for voter contact to persuade and mobilize targeted voters during the election campaign. However, the methods selected for GOTV have the ability to communicate directly and immediately with voters in order to convey a sense of urgency, check whether or not they have voted and gently persuade them in a personal way to get out and vote if they have not already done so.</p>

Steps	Description	Type	Min	Note to the Trainer
	Conclude the discussion by saying that GOTV is about polite pushing: mobilizing and persuading supporters that it is essential that they go to the trouble (and sometimes hassle) of actually casting a ballot once voting has begun. The more difficult or unpleasant voting is in your area, the harder you may have to work to convince them this is a good idea.			
2	<p>Ask participants to return to (or remain in) their groups. Provide each with a piece of flipchart paper and a marker.</p> <p>Ask the participants to think about obstacles voters may encounter on election day, and how their parties or campaigns might be able to address these in their GOTV efforts. Use the questions below as examples:</p> <ul style="list-style-type: none"> • Will your supporters need transportation or assistance getting to the polling station? • Will they need help finding their polling stations? • Do you need to remind them what type of identification they should bring? • Will they need someone to help mind children while they vote? • Are they likely to experience any form of intimidation at the polls, or could they find the voting process itself intimidating or bothersome if there are long lines or large crowds? • Is there anything in the voter registration process that could cause confusion or obstacles for voters? • Will issues of illiteracy cause problems for voters understanding where and how to vote? <p>Instruct the groups to write down their ideas on the flipchart paper. Give 10 minutes for this activity.</p>	PEE + DBR	25	Reviewing the lists at the end of this activity may also provide an opportunity to emphasize the point that the more a campaign has been able to track its voter contact activities, the more targeted and effective its GOTV efforts will be. A well-run campaign should be able to mobilize supporters according to geographic area, street, family, clan or even individual name.

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	<p>Invite groups to present their findings and for each obstacle they list ask how their party or campaign could address this issue as part of their GOTV or voter contact efforts.</p> <p>After the presentations are done review the lists, which are likely to indicate that the execution of GOTV requires a lot of preparation and volunteers on election day. Reinforce this point and suggest that GOTV actually needs to be planned for well in advance, rather than at the end of a campaign.</p>			

SECTION 5 – Get Out the Vote and Obstacles to Voting (Version B) – 15'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce Get Out the Vote and explain what the term means:</p> <p>The final effort a campaign has to make is to ensure that all those voters who expressed their support actually cast their ballots on election day. This work is called Get Out the Vote (GOTV), and it is a key component of every voter contact plan.</p> <p>Explain that GOTV is all the activities that a campaign conducts towards the end of the campaign period and on election day to ensure that its supporters actually show up at their polling place and cast their ballot.</p> <p>Stress that while voter contact efforts in the weeks and months prior to an election target mainly undecided and highly persuadable voters, GOTV targets only those voters who are or who have become supporters. This is exactly why the voter contact record (discussed in the previous section) is so important and for this phase. A campaign that does not record voter support is not able to track its voters individually, which means it cannot contact or mobilize them on election day.</p> <p>Ask the participants how they think GOTV can be done and what types of activities they think will be most effective. Brainstorm a short list and write participants' ideas on the flipchart.</p> <p>Debrief the list by saying that the actual techniques used for GOTV will depend on the local environment, election law and campaign culture, but that typical methods include:</p> <ul style="list-style-type: none"> ● Door-to-door canvass ● Phone banks ● SMS and mobile phone messaging ● Persuasion literature drops 	TP + DBR	15	<p>It is important in this section to reinforce the point that it does not matter how many voters say they are going to support your party or candidate; what matters is how many voters actually do this (get out and vote for your party or candidate).</p> <p>Additionally, ensure that participants understand that GOTV efforts are never for all the voters, because a party or campaign risks mobilizing its opponent's supporters this way. GOTV activities must be targeted to connect directly with a campaign's own supporters.</p> <p>During the discussion on what types of activities will be most effective, keep in mind that the activities typically used for GOTV are exactly the same or similar to those used for voter contact to persuade and mobilize targeted voters during the election campaign. However, the methods selected for GOTV have the ability to communicate directly and immediately with voters in order to convey a sense of urgency, check whether or not they have voted and gently persuade them in a personal way to get out and vote if they have not already done so.</p>

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	<p>Conclude the discussion by saying that GOTV is about polite pushing: mobilizing and persuading supporters that it is essential that they go to the trouble (and sometimes hassle) of actually casting a ballot once voting has begun. The more difficult or unpleasant voting is in your area, the harder you may have to work to convince them this is a good idea.</p> <p>Reinforce the point as well that the more a campaign has been able to track its voter contact activities during the electoral campaign, the more targeted and effective its GOTV efforts will be. A well-run campaign should be able to mobilize supporters according to geographic area, street, family, clan or even individual name.</p>			

SECTION 6 – Voter Contact Planning (Version A) – 65’*

***NB: If you do not have sufficient time to run the full training, use Voter Contact Planning (Version B).**

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the concept of building a voter contact plan by explaining the following to participants:</p> <p>Throughout this module, you have analyzed and constructed all of the elements that you will need for effective voter contact. It is time to bring them all together in a centralized plan. A simple grid system (such as a table) allows you to collect and merge all of the research and strategic planning you have done as you have worked through the voter contact elements of your campaign.</p> <p>Provide participants with copies of Appendix 1, Sample Voter Contact Plan. (If you are unable to make copies, project the image onto a screen or wall, or reproduce it on a flipchart.)</p> <p>Explain that this plan has been devised for a campaign with the following goals and challenges (it may be helpful for participants if you write this information on the flipchart):</p> <ul style="list-style-type: none"> 14,000 A voters to be contacted through community meetings, a leaflet drop and a billboard 23,000 B voters to be contacted through canvassing, community meetings and a billboard 12,000 C voters to be contacted through canvassing <p>The campaign is also targeting the</p> <ul style="list-style-type: none"> 80,000 first-time voters in the country; 40,000 are estimated to be actively engaged in social media websites The official campaign period is 120 days. This campaign will not have to take any breaks or days off for holidays. 	TP	15	<p>There is a fair amount of math to be done to figure out a voter contact plan as accurately as possible. These are fairly simple calculations and completing these will make a very real difference in tracking the progress and impact of a campaign, and managing resources effectively.</p> <p>Encourage participants to use the calculators on their mobile phones to complete these calculations. If they are unlikely to have mobiles or to have this utility on their phones, provide participants with basic calculators for use in the training.</p> <p>As you walk participants through the sample plan, it is important to note that the “Financial Cost” column in this example lists the items associated with each activity but that no actual financial figures are given. This is merely to protect the integrity of the document, which will be used in a number of different settings with different currencies and variations in local prices. However, it is vital that in their own planning, participants include accurate figures in this column so that the campaign is fully aware of the level of resources it will have to obtain and manage. This does not have to be done in the training itself as it is unlikely participants will be able to conduct this type of research during a workshop, but participants should be instructed to do this work on their own after the session.</p>

Steps	Description	Type	Min	Note to the Trainer
	Walk the participants through each aspect of the plan. Allow participants to interrupt with questions as they occur, rather than waiting until the end.			Also, it may be useful to point out to participants that a complete voter contact plan will contain a separate planning section for GOTV, so that the campaign can adequately prepare for its GOTV activities and begin to shift towards these as the campaign period draws to a close. There is not a section for GOTV in the handouts given for this training.
2	<p>Ask participants to return to (or remain in) their groups. Provide each group with blank Voter Contact Plan Forms (Appendix 2), flipchart paper and markers.</p> <p>Instruct participants to construct a Voter Contact Plan using these materials and the findings from the previous work they have done in this session, particularly the exercise at the end of Section 2 where they selected the voter contact techniques they will use in their campaigns, and which will be used for each group of voters they are targeting.</p> <p>Provide participants with any information they need to know about the length of the legal campaign period and any days or hours in which campaigning is either not allowed or is not culturally acceptable.</p> <p>Give the groups 30 minutes to complete their plans and provide about 20 minutes for all the groups to briefly present them. Allow the participants to offer feedback to each other, as well as offering your own feedback as a trainer. If there are gaps in participants' plans, give them a specific amount of time to complete their research and assign a person and a date to report back to you with a finished plan.</p>	ANK + CLL	50	<p>You will need to prepare copies of Appendix 2, Voter Contact Plan Form for participants for this exercise. One copy per participant is ideal but if this is not possible, one copy per group or team will do.</p> <p>Some participants may find it difficult to accurately estimate the sizes of the populations of their target voters, particularly if they have not worked with this type of information before and if they have not conducted the voter targeting exercise from Module 3. If participants are not familiar with these figures, ask them to make an estimation of how many voters might be in each group and then give them the task of researching and checking these figures after the training. Assign one person and a specific deadline for each group to report back to you.</p> <p>It is also important that you are aware of the length of the legal campaign period and any days or hours in which campaigning is either not allowed or is not culturally acceptable, so that you can advise participants when it comes to this calculation.</p> <p>Allow plenty of time for group work and discussion during this exercise. It is an important opportunity for participants to consolidate all of the information from the training session and apply it to their own campaigns.</p>

SECTION 6 – Voter Contact Planning (Version B) – 20’

Steps	Description	Type	Min	Note to the Trainer																																			
1	<p>Introduce the concept of building a voter contact plan by explaining the following to participants:</p> <p>Throughout this module, you have analyzed and constructed all of the elements that you will need for effective voter contact. It is helpful to bring that information together into a single document for purposes of building a comprehensive plan for your campaign.</p> <p>Reveal the flipchart you have provided in advance. Explain that the purpose of this chart is to bring together all of the information they will need to execute a voter contact plan and to begin to think through what they will need to actually implement this plan.</p> <p>Explain each of the columns:</p> <ul style="list-style-type: none"> ● Method – the voter contact methods the groups have chosen ● Target Voters – which groups of voters they will endeavor to contact using each method ● How Many – an estimate of the number of voters they will contact using each method ● When – when they will actually conduct these activities ● Resources – a list of the resources they will need, such as volunteers, leaflets, mobile phones, etc. <p>Ask participants if they fully understand the topics in each of the columns and the purpose of the table itself.</p>	TP + DBR	15	<p>Draw the following table on the flipchart in advance:</p> <table> <tr> <th>Method</th><th>Target Voters</th><th>How Many</th><th>When</th><th>Resources</th></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> </table>	Method	Target Voters	How Many	When	Resources																														
Method	Target Voters	How Many	When	Resources																																			

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
2	<p>Ask participants to return to (or remain in) their groups. Provide each group with flipchart paper and markers.</p> <p>Ask participants to return to the work that they did at the end of Section 2 on Impact vs. Effort: Assessing Voter Contact Methods in which they constructed a list of the voter contact methods they will use in the campaign and which target voters they will reach with each. (Some participants may have added a third topic as well, listing the size of the populations of target voters.)</p> <p>Instruct groups to recreate the table you have just explained to them on their flipchart paper and complete each of the columns based on the work they have already done and their own knowledge of the electoral campaign.</p> <p>Give the groups 10 minutes to complete their plans and provide allow 5 minutes for the groups to present them and to debrief them.</p>	ANK + CLL	15	<p>Some participants may find it difficult to accurately estimate the sizes of the populations of their target voters, particularly if they have not conducted the voter targeting exercise from Module 3. If participants do not have access to this information, ask them to make an estimation of how many voters might be in each group and then given them the task of researching and checking these figures after the training. Assign one person and a specific deadline for each group to report back to you.</p>

CONCLUSION – 5’

1	<p>Summarize the session:</p> <ul style="list-style-type: none">Running a winning campaign is not about having the most resources; it is about using what you have effectively and strategically.You need to know how many people are expected to vote and who these voters are in order to set a clear goal for an election. This is why we look for trends in voting behavior and in the electoral environment.You need to define what “winning” will look like for your campaign so that you know what you are working towards. A vote goal is the number of votes you will need to win.Both geographic and demographic targeting are crucial strategic approaches. They are all about using your resources wisely, by getting the right message to your targeted persuadable voters.	TP + CLL	5	
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Method	Target Audience	Size of Audience	Total Number of Contacts to be Made	Daily Contact Count (120 day election period)	When	Financial Costs	Volunteers Needed
Canvassing	B	23,000	2 per voter (23,000 x 2 = 46,000)	384 (46,000 ÷ 120 = 384)	1st contact in 1st 60 days of campaign; 2nd contact in last 60 days of campaign	Voters List, production of canvassing materials, refreshments for volunteers	50 per day (working in teams of 2)
Canvassing	C	12,000	2 per voter (12,000 x 2 = 24,000)	200 (24,000 ÷ 120 = 200)	1st contact in 1st 60 days of campaign; 2nd contact in last 60 days of campaign	Voters List, production of canvassing materials, refreshments for volunteers	22 per day (working in teams of 2)
Community Meetings	A and B (opinion leaders from A and B communities)	100	1	20 per meeting (100 ÷ a total of 5 meetings = 20 per meeting)	1 meeting per week in last 5 weeks of campaign	Meeting invitation and promotional materials, banners, microphone, campaign materials and refreshments	2 per meeting
Billboards in target areas	A and B	11,000	1	0	Last 2 weeks of campaign	Billboard hire, design and production of billboard sign	0

Social Media Campaign	First time voters	40,000	1 (40,000 ÷ 334)	334 per day (average)	Throughout campaign	Internet time, computer costs	0
Personalized Letter	First time voters	80,000	1	n/a	Send 14 days before election day	List of first-time voters and contact information, design and printing of letter, envelopes, paper and stamps	100 to stuff envelopes with letters
Leaflet drop	A	14,000	1	466 (14,000 ÷ 30 = 466)	Last 4 weeks of campaign	Design and printing of leaflet, production of maps for leaflet drop	30 per day
Phone calls to voters	B and C	25,000	1	417 (25,000 ÷ 60 = 417)	Last 60 days of campaign	Phones and calling time, production of lists of voters to be called	15-20 per day

Method	Target Audience	Size of Audience	Total Number of Contacts to be Made	Daily Contact Count (120 day election period)	When	Financial Costs	Volunteers Needed

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Method	Target Audience	Size of Audience	Total Number of Contacts to be Made	Daily Contact Count (120 day election period)	When	Financial Costs	Volunteers Needed

Campaign Skills Trainer's Guide

Module 5 Identifying Issues and Developing Policy Positions



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 5: IDENTIFYING ISSUES AND DEVELOPING POLICY POSITIONS

SESSION OVERVIEW:

To effectively reach voters, candidates and parties must offer specific solutions to issues that voters care about. This module teaches participants how to identify issues relevant to voters and how to use those issues in the context of an electoral campaign and their political party's platform. It also includes tools for developing specific policy solutions to key issues and communicating effectively about policy proposals.

NB: To cover this topic comprehensively can take a significant amount of time. Therefore, there are two options for how to conduct this training. For the Communicating Policy segment, there is a Version A and a Version B. Version A is a more detailed exploration of the topic and as a result takes longer to complete. Version B is shorter but still covers the main points. Trainers should choose between these options based on how much time they have, what they need to accomplish and the capacity of their audience.

SECTIONS:

1. What is Policy?
2. Issue Identification and Research
3. Tools for Developing Policy Options
4. Communicating Policy

LEARNING OBJECTIVES:

- Identifying priority issues for voters
- Developing policy solutions to identified issues
- Understanding how to communicate issues and use them to advance a campaign message

TIME: 240 minutes (using Version A) or 190 minutes (using Version B)

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

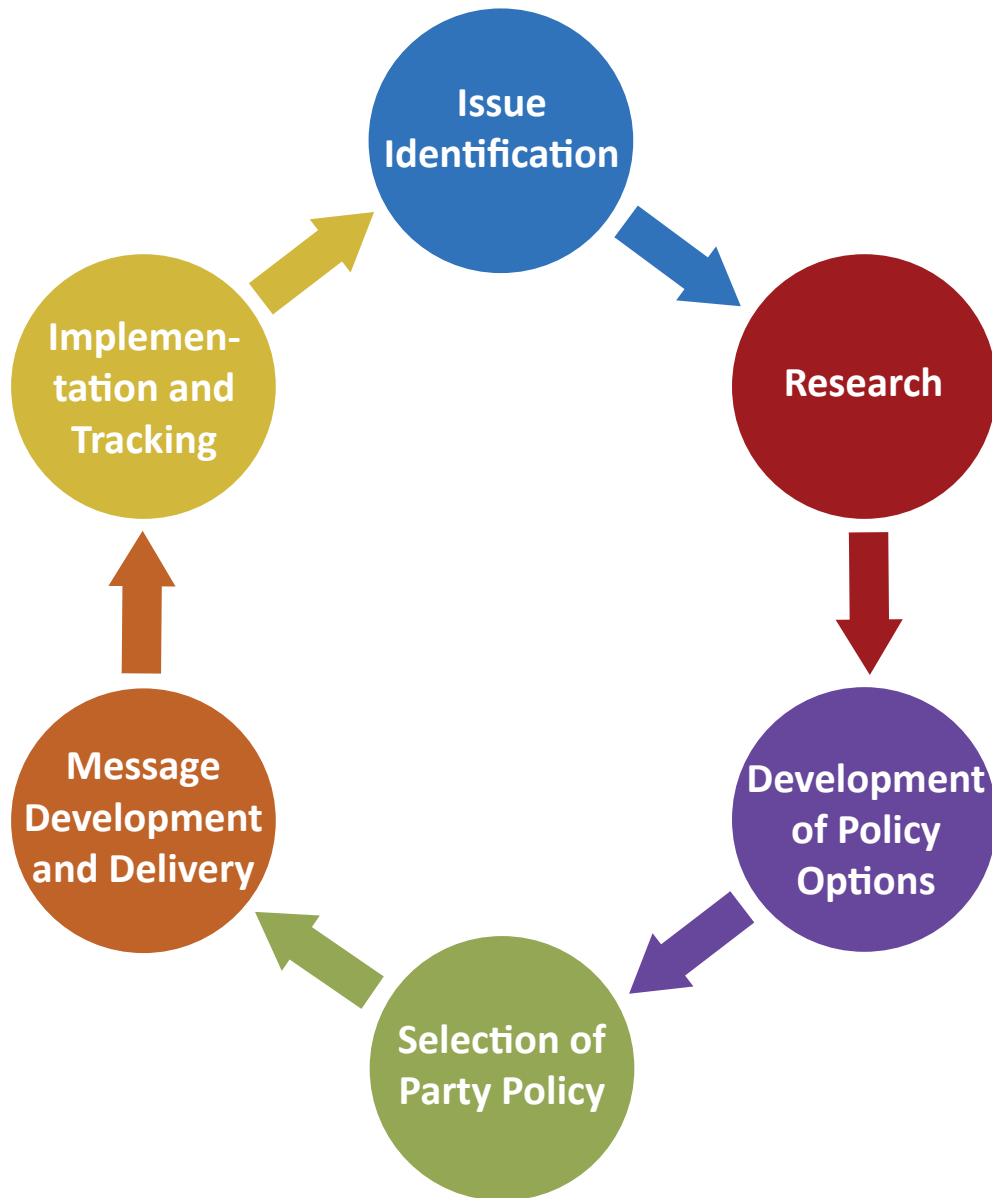
- MENA Regional Campaign School Workbook
- Questions for Identifying Policy Solutions (Section 2, 2nd step)

PREPARATION:

Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives

3. Stages of Policy Development



4. Identifying issues

- What do you see/hear that looks like a problem or an opportunity?
- Where are there crises in society now?
- Where are there likely to be crises in the future?
- What are the under-utilized assets or opportunities?

5. Building an Evidence Base

- Clarifies problems
- Distinguishes causes from symptoms
- Offers an independent perspective
- Creates a greater likelihood of successful policy implementation
- Gives stakeholders a voice
- Assures a better use of public funds

6. Three steps for the development of policy options

- Clearly defining the outcome
- Identify the routes for reaching or achieving outcomes
- Check the viability of options

7. SMART

- **Specific** – described in precise terms
- **Measurable** – progress can be quantified
- **Achievable** – it can actually be accomplished with the time and resources available
- **Realistic** – it is a sensible and practical goal
- **Time-bound** – a specific time has been set to achieve the objective

8. Political Considerations of Policy Options

Environment	What is current public opinion on this issue? What is current public opinion of major political actors on this issue?
Supporters	Who is likely to support the policy? Why? Will their support be strong or weak? How can I maximize their support?
Opponents	Who is likely to oppose the policy? Will their opposition be strong or weak? What will their arguments be against the policy? How can I neutralize these arguments?
Stakeholders	Who is most likely to be affected by this policy? What degree of change will they have to adjust to? What is their initial reaction likely to be? What information or interaction do they need to support the policy?

9. Objectives of effectively communicating policy

- Inform the public, especially affected people
- Communicates a party or candidate's ideas and vision for society
- Mobilize stakeholders involved in implementation
- Help change attitudes or behavior
- Simplify complex issues
- Prepare relevant government agencies to respond

10. Policy communication framework

- Problem
- Reason for Bringing the Problem Forward
- Symptoms
- Elaborate on the Symptoms
- Context
- Desired Change (outcome)
- Policy Recommendation

11. Communicating Policy (Version B only)

Policy or Product	Feature	Benefit
Toyota Corolla	1.8-Liter 4-Cylinder DOHC 16-valve engine with dual variable valve timing with intelligence	Reliable
Tetley's Teabags	A multi-layered cloth bag with hundreds more perforations and a round shape to encourage centrifugal movement of the contents	Delicious and refreshing tea
Micro Economic Policy	Targeted investment in key areas that promote economic growth	Jobs and a better future for young people
Youth Mentoring Program	Direct intervention strategy to deter youth people from engaging in high risk behaviors by offering positive alternatives in training and employment	Safer streets and less crime
Reducing Gender Inequalities in Education	Incentive program to persuade younger women and their families to remain in school until the completion of secondary education	Families will have more money and fewer financial burdens for the rest of their lives

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer's Presentation

PEE – Participants' Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

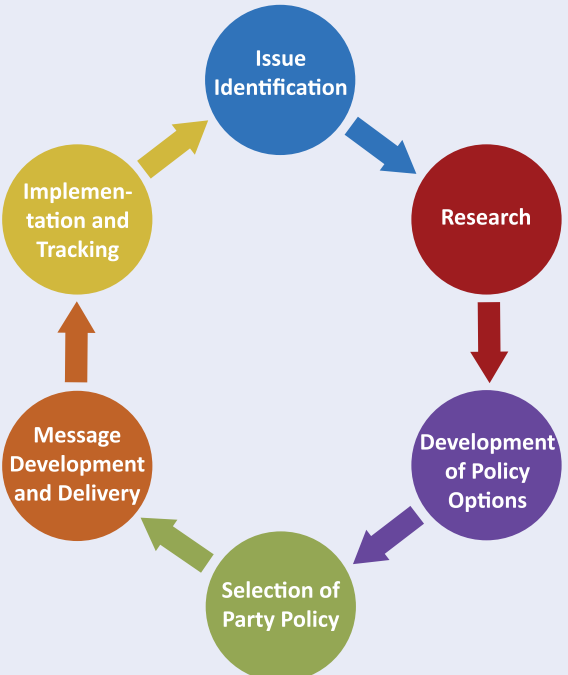
ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – What is Policy? – 35'

Steps	Description	Type	Min	Note to the Trainer
1	Introduction to the session and learning objectives.	TP	1	
2	<p>To introduce what policy is, ask participants to think of one particular change he or she would want to see happening as a result of his or her political engagement in the country, region (province) or local community. One or two minutes should be enough for them to think and write down.</p> <p>Then, invite each participant to read their answer while you write them on the flipchart.</p> <p>Most of the changes participants come up with will be repeated and you just keep the count of how many times each was mentioned, so at the end you will know which two were the most frequently named. Rewrite just those top two on a new piece of flipchart paper.</p>	DBR	10	<p>When asking the participants about one change they would want see happening, you are basically asking them about their political values and ideas. These are the core of political competition, and are the foundation on which many policy proposals are built.</p> <p>When an answer is not clear or too vague (for example, “happier people” or “better society”), ask for explanations about what might make this happen until you get a more specific response. Use probing questions such as, “What would make people happier?” or “What would make society better?” until you get an answer like “more jobs” or “less violence”).</p> <p>If the list is very diverse or if there is no consensus among the participants about the change they would like to see, ask participants which of the issues listed on the flipchart is the most important for the country or the community right now. Then, take a vote (each participant gets to vote once). Take the top two topics which get the most votes.</p> <p>Some common societal problems are listed below. Use this list to prepare for this discussion, anticipating some of the issues that might be raised. If it is appropriate, you can add any significant problems from this list, which may have been overlooked during the brainstorm.</p>

Steps	Description	Type	Min	Note to the Trainer
				<ul style="list-style-type: none"> • Illiteracy • Access to education, poor quality of education • Poverty • Access to clean drinking water • Lack of affordable housing • Security, crime, violence or lack of personal safety • Domestic violence • Inadequate emergency services • Jobs, lack of jobs, poor pay • Corruption • Inadequate transportation • Poor, insufficient or unaffordable health care • Environmental contamination
3	<p>Ask the participants to choose one of those two problems listed on the flipchart. They should choose the one they consider either more important or they would work on. Divide all the participants who picked the first issue into two or more groups. Do the same with the participants who selected the second issue. Ask them to sit together.</p> <p>Assign all the groups with the following task: <i>You have in front of you a significant societal problem. It is now your job to try to fix it. In the next 10 minutes, your task as a team is to come up with a clear solution for how this issue can be addressed.</i></p> <p>Ensure that all of the participants understand the assignment. Inform participants that they have 10 minutes to complete this task.</p> <p>When the time is up, ask each of the groups that were dealing with the first issue to send a representative to the front of the room, read their solutions, and write them on the flipchart. Do the same with the groups that were working on the second issue. After all the groups have presented, post the flipchart paper with their proposals on the walls where they can be easily viewed by participants.</p>	PEE	15	<p>The purpose of dividing participants into 2 groups to work on the same issue is to demonstrate that there is more than one way to address the same problem, or more than one policy. The total number of groups you divide participants into will depend on how many participants there are, but it's important to ensure there are at least 2 groups per issue with no more than 5 people per group.</p> <p>Try to assign participants to the issue in which they are most interested as they will work on the issue they select at this point throughout the training. However, if participants do not objective, it is fine to move people around to create balance among the size of the groups. There will also be an opportunity in the next exercise to merge together some of the groups working on the same issue if they are too small.</p> <p>As the groups are working on coming up with solutions, go around and facilitate their discussions to make sure they are coming up with concrete solutions that could actually be implemented. Don't get involved in the decision-making of the group or push too hard but if proposed solutions are highly theoretical or unrealistic, ask probing questions to guide them to more detailed answers.</p>

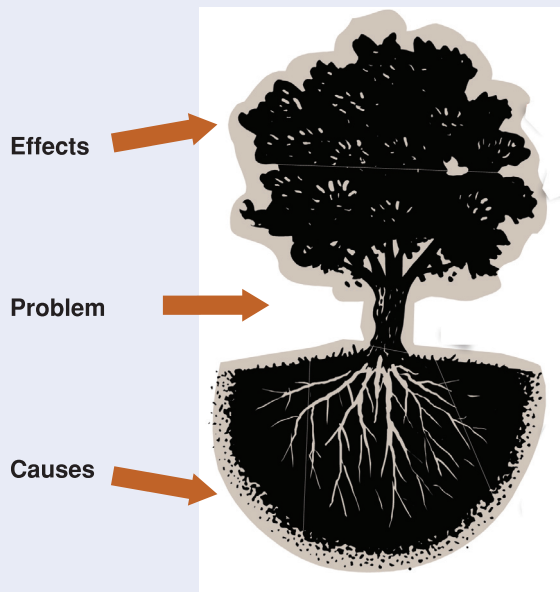
Steps	Description	Type	Min	Note to the Trainer
	<p>Review the solutions that the participants have come up with on the flipchart pages. Make the point that these are policies.</p> <p>Clarify that: <i>policies are plans about how a political, social or economic vision will be achieved, how it will be funded, and how it will be implemented as specific actions.</i></p> <p>Ask participants if they thought of their solutions as policies. If not, how did they see them?</p> <p>It is highly likely that the different groups working on the same issue will come up with completely or slightly different solutions. If this is the case, ask the participants what they think of this. Guide the conversation to the learning point that each problem can be addressed in many different ways and that there is always more than a single solution.</p>			<p>If there is sufficient time, briefly discuss with participants whether they would like to live in a country or local community where the solutions written on the flipchart paper were official government policy. The point of this discussion is to begin to create an understanding of the impact of the decisions that political parties and elected officials make on policy.</p>
4	<p>Refer again to the problems and solutions written on the flipchart paper by each of the groups, and reference the work that they have just done. Explain that they have just experienced some of the stages of policy development.</p> <p>Explain that: <i>Policy development is the process by which societal problems are identified, their causes are isolated, and potential solutions are devised and implemented.</i></p> <p>Explain that policy development generally moves through 6 stages. Walk participants through this graph on the flipchart, explaining each phase in turn.</p> <p>1. Issue Identification helps a political party recognize and target the specific social problems or policy areas on which it can and should act.</p>	TP	8	<p><u>Stages of Policy Development</u></p>  <pre> graph TD A((Issue Identification)) --> B((Research)) B --> C((Development of Policy Options)) C --> D((Selection of Party Policy)) D --> E((Message Development and Delivery)) E --> F((Implementation and Tracking)) F --> A </pre>

Steps	Description	Type	Min	Note to the Trainer
	<p>2. Research involves gathering as much reliable information as possible to inform the party's understanding of and response to an issue. Good research focuses on outcomes: what do I need to achieve and how can I achieve this?</p> <p>3. Development of Policy Options: There is rarely only one option available to address an issue or problem. The spectrum of choices typically starts with doing nothing and moves all the way to a large state-driven initiative to address a problem. A good response starts with assessing all of these, asking: what is likely to be most effective option given the available resources, and does this response address the problem as defined by the community that will be affected?</p> <p>4. Selection of Party Policy: A political party must choose what its official position is based on the options available and what it is going to implement if elected to government.</p> <p>5. Message Development and Delivery: At this stage, a party must effectively communicate with target audiences and stakeholders the specifics of its policy, why it has chosen this policy, what the benefits are to society, and what will happen when it is implemented. If policy is being developed in the context of an electoral campaign, an election typically takes place at this point, between steps 5 and 6.</p> <p>6. Implementation and Results Tracking: If a party is elected to government, the next stage is to implement the policies and document its achievements, evaluate the results, and ensure public funds are not being wasted. Opposition movements shift at this stage to monitoring the governing party's policies and results, and continuing to offer their own ideas as a contrast.</p>			<p>To help make this a more interactive discussion rather than a mini-lecture, as you name each phase on the graph but before you explain it, ask participants to say aloud what they think happens at this point. If you have time, you can write these down on the flipchart and then add any factors that have been missed.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Point out that at times, the stages of policy development occur as distinct phases and the process moves step by step, but when the political environment is more heated or energized or if an issue requires a rapid response, several of these stages can overlap or run consecutively.</p> <p>Once you have reviewed the stages of policy development, ensure participants understand each phase and ask when policy development is likely to take place. <i>When is it that a political party or campaign needs to think about developing policy?</i></p> <p>Debrief the discussion by making the points below. You can write the two contexts for policy-development (elections, governing) on the flipchart as you deliver this information.</p> <p><i>In many ways, policy development is an ever-present process, but it happens largely in two main contexts:</i></p> <ol style="list-style-type: none"> <i>1. In the context of an <u>election</u>: for political parties and candidates to present their ideas to the electorate and to contrast themselves with the proposals of their opponents; and,</i> <i>2. In the context of <u>governing</u>: the governing party or parties must put forward a clear legislative and policy agenda for the country, and the opposition party or parties must advance their own ideas to challenge those of the government, while also holding the government accountable by monitoring the results of the its policies and expenditures.</i> 			

SECTION 2 – Issue Identification and Research – 75’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Ask the participants how they came up with the issues or changes that they listed in the beginning of the workshop. The responses are likely to suggest that they heard about or read about the problem, or that they experienced the problem themselves.</p> <p>Summarize the participants’ answers by saying, Identifying a problem or issue can start with something as simple as observation.</p> <p>Read the questions on the flipchart about how to use observation to identify issues.</p> <ul style="list-style-type: none"> - <i>What do you see/hear that looks like a problem or an opportunity?</i> - <i>Where are there crises in society now?</i> - <i>Where are there likely to be crises in the future?</i> - <i>What are the under-utilized assets or opportunities?</i> - <i>What are the problems that make the lives of your supporters or potential supporters harder?</i> <p><i>Point out that:</i></p> <p><i>Observation really is about paying attention to what’s happening in our country, our communities and our society. It can be a starting point for identifying an issue that needs a policy solution.</i></p> <p><i>However, observation is an informal mechanism for issue identification and may not provide the whole picture. It is important to properly diagnose a problem before attempting to develop policy options. The Problem Tree Analysis helps create a more complete understand of a problem or issue.</i></p>	DBR	5	<p>Questions for observation written on the flipchart in advance:</p> <div> <p><u>Identifying issues: OBSERVATION</u></p> <ul style="list-style-type: none"> • What do you see/hear that looks like a problem or an opportunity? • Where are there crises in society now? • Where are there likely to be crises in the future? • What are the under-utilized assets or opportunities? • What are the problems that make the lives of your supporters or potential supporters harder? </div>

Steps	Description	Type	Min	Note to the Trainer
2	<p>Introduce the Problem Tree Analysis as a tool to help with issue identification, the initial stages of policy development, and particularly to help distinguish between the causes and effects (or symptoms) of a problem.</p> <p>Explain that: <i>The Problem Tree Analysis helps untangle complex problems. It helps us identify the parts of a problem that we can see, as well as to comprehend the parts that are less visible to us through simple observation.</i></p> <p>To illustrate how this tool works, draw the tree on the flipchart and walk participants through each of its elements</p> <p>In the Problem Tree Analysis model:</p> <ul style="list-style-type: none"> the problem to be addressed is the trunk of the tree the effects, results or symptoms of the problem are the branches and leaves (the part that is most visible) the causes or sources of the problem are the roots (the part that is most difficult to see or most deeply embedded) <p>Instruct participants that: <i>To conduct the Problem Tree Analysis, you need to:</i></p> <ol style="list-style-type: none"> Write down the problem or issue to be analyzed, as you currently understand it. Write down what you consider the causes or sources of the focal problem to be. Write down the consequences, effects or outcomes. <p>Use the following example to help participants fully understand the difference between the root causes of a problem and its symptoms. Write this out on your model problem tree on the flipchart, first listing the symptoms or effects, then the problems. Then, ask participants to define the problem and work with them to come up with a suitable description.</p>	TP	10	<p>Draw the tree on the flipchart like this:</p>  <p>The purpose of this session is to help participants further understand and break down the issues they have identified before they develop policy responses.</p>

Steps	Description	Type	Min	Note to the Trainer						
	<table><tr><td>Symptoms/ Effects describe WHAT</td><td>Petty crime, car theft, vandalism to public property on the increase Use of drugs on the rise; availability of drugs increasing Rising public disorder problems</td></tr><tr><td>Causes describe WHY</td><td>Young men between the ages of 18-30 are not able to find work</td></tr><tr><td>Policy addresses WHY</td><td>The causes and not the symptoms</td></tr></table>	Symptoms/ Effects describe WHAT	Petty crime, car theft, vandalism to public property on the increase Use of drugs on the rise; availability of drugs increasing Rising public disorder problems	Causes describe WHY	Young men between the ages of 18-30 are not able to find work	Policy addresses WHY	The causes and not the symptoms			
Symptoms/ Effects describe WHAT	Petty crime, car theft, vandalism to public property on the increase Use of drugs on the rise; availability of drugs increasing Rising public disorder problems									
Causes describe WHY	Young men between the ages of 18-30 are not able to find work									
Policy addresses WHY	The causes and not the symptoms									
3	<p>Ask participants to return to (or remain in) their groups. Provide each group with flipchart paper and a marker.</p> <p>Instruct each group to construct a problem tree analysis for the issue they identified at the beginning of the workshop. Ask them to fully think through what the problem is and what its causes are. Advise participants that if during the course of their discussion and analysis their definition of the problem changes, it is fine to alter it for this exercise.</p> <p>Provide participants with 15 minutes to complete their problem tree analysis, and 15 minutes for each group to present their work.</p> <p>During the debrief, focus on the following questions:</p> <ul style="list-style-type: none">Is the problem as you have currently defined it really at the core of the causes and effects you have identified?Do you need to refine the problem more, break it down into smaller pieces or use more specific language?What research or evidence do you need to bring in to help you understand the issue better?	ANK	30	<p>At this point, you either can reorganize the groups if they were too small or merge those that were working on the same issue, or you can keep the same groups if their size was up to 5 people.</p> <p>As you move along in this workshop, you can bring participants back to the initial problems and solutions they came up with in the first exercise (which are posted on the walls) at various moments, and ask whether they would approach either the issue or their proposed solutions differently based on what they are learning or what the group is discussing.</p> <p>The final question for the debrief of this section leads into the next discussion on building a base of evidence.</p>						

Steps	Description	Type	Min	Note to the Trainer
4	<p>Remind participants that after issue identification, the next step in policy development is conducting research or building an evidence base to better understand a problem and begin to mold potential solutions or proposals.</p> <p>Outline the reasons why research and building an evidence base are important:</p> <p>Building an evidence base:</p> <ul style="list-style-type: none"> ● Clarifies problems. <i>Many issues are more complex than they may appear at first. Evidence helps untangle complicated problems.</i> ● Distinguishes causes from symptoms. <i>Often, the symptoms of a problem or issue are perceived as its causes. Evidence helps policy makers get to the root causes – what factors are causing a problem and its symptoms.</i> ● Offers an independent perspective. <i>Evidence can bring in an independent voice on an issue, which may offer a new or vital perspective that may otherwise have been missed or may have been clouded by personal opinion.</i> ● Creates a greater chance of successful policy implementation. <i>When policy solutions are ultimately developed, they are more likely to be successfully if they are guided by evidence and the experience of those affected by an issue</i> ● Gives stakeholders a voice. <i>One of the main reasons policy proposals fail is that the people most affected by them are not given a say in their development. Building an evidence base helps bring in the opinions of stakeholders.</i> ● Assures a better use of public funds. <i>Policy proposals not informed by evidence risk wasting public funds and other resources because they may not be fully or accurately addressing the problem.</i> 	TP + DBR + PEE	30	<p>Conducting research and building an evidence base are used as interchangeable terms in this session.</p> <p>Prepare the following on the flipchart:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Building an Evidence Base:</p> <ul style="list-style-type: none"> ● Clarifies problems ● Distinguishes causes from symptoms ● Offers an independent perspective ● Creates a greater likelihood of successful policy implementation ● Gives stakeholders a voice ● Assures a better use of public funds </div> <p>Since this brainstorming will be about different issues every time you deliver the training, the general instruction is to elicit as many answers as the participants can come up with. Your facilitation role is:</p> <ol style="list-style-type: none"> 1. To ensure the participants understand how each piece of information they claim is needed fits into understanding the issue. 2. To ask where each of the types of evidence which the participants list could be found and coach participants to think creatively of possible sources of information. 3. If participants do not mention direct consultation or some other form of stakeholder-based evidence, ask them if they would look for the opinion of those affected by the issue. 4. To ensure participants fully understand the difference between the root causes and the symptoms of a problem. <p>Since this brainstorming will be about different issues every time you deliver the training, the general instruction is to elicit as many answers as the participants can come up with. Your facilitation role is:</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask participants: <i>Are there any other reasons why you think it's important to build a base of evidence when developing policy?</i></p> <p>Briefly discuss their answers and add any relevant points to the list on the flipchart.</p> <p>Ask participants to return to (or remain in) their groups from the first exercise. Provide each group with a piece of flipchart paper and a marker.</p> <p>Inform the participants that they now need to think about how they would further understand the issues they have identified and how they would begin to build a base of evidence to inform their understanding of the issue.</p> <p>Instruct participants to work in their groups to answer the following questions</p> <ol style="list-style-type: none"> 1. Considering the issue you have identified, what information would you need to know before developing policy solutions? 2. Where could you go to find this information? <p>Allow 10 minutes for the groups to discuss this and 10 minutes to present their answers to the larger group.</p>			<ol style="list-style-type: none"> 1. To ensure the participants understand how each piece of information they claim is needed fits into understanding the issue. 2. To ask where each of the types of evidence which the participants list could be found and coach participants to think creatively of possible sources of information. 3. If participants do not mention direct consultation or some other form of stakeholder-based evidence, ask them if they would look for the opinion of those affected by the issue. 4. To ensure participants fully understand the difference between the root causes and the symptoms of a problem. <p>Use the following list as a guide to help participants identify possible sources of information or evidence. A detailed explanation for each of these can be found in NDI's Campaign Skills Workbook, Module 5.</p> <ul style="list-style-type: none"> ● Academic Research ● Asset Inventories ● Reports from Official Audit Agencies or Legislative Committees with Audit Responsibilities ● Community Cafés ● Committee Reports ● Community Mapping ● Reports from local Civil Society Organizations ● Reports from International Organizations ● Focus Groups ● Gender Analysis ● Media Coverage ● Official Statistics ● Public Consultation ● Stakeholder Interviews ● Surveys

SECTION 3 – Tools for Developing Policy Options – 55'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Remind participant what they have achieved so far.</p> <p>You have:</p> <ul style="list-style-type: none"> Recognized what policy is, Defined the policy development process Learned how to identify issues, Thought about where to look for evidence and research, Defined the difference between causes and symptoms <p>The next step is to think about developing policy solutions.</p> <p>One of the best ways to do this is to approach the development of policy options is to use the following 3steps:</p> <ol style="list-style-type: none"> Clearly define the outcome you want to achieve Identify possible routes for achieving these outcomes Consider the viability of options 	TP	5	<p>Three steps for development of policy options:</p> <ol style="list-style-type: none"> Clearly defining the outcome, applying SMART criteria Identify possible routes for achieving outcomes Consider the viability of options
2	<p>Introduce the 1st step: Clearly define the outcome or outcomes you need or want to achieve</p> <p>Outcomes are results. The best policy options are formulated by starting by clarifying the outcomes you want to achieve, and working backwards from there. In other words, what is the change you would like to happen as a result of your policy? What is your vision? For example:</p> <ul style="list-style-type: none"> What should be the minimum level of education reached for children and young people? What should the quality of life be like for pensioners? How easy should it be for small and medium businesses to start and grow? 	TP	5	

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> What should the maternal mortality rate be? What should life expectancy be? What should the rate of employment be? <p>Another way of looking at it is to consider how you would reverse the terms of the problem you clarified in the issue identification stage. If the problem, for example, is that 51 percent of boys from poorer families are not completing secondary education, what is the opposite of this in realistic terms?</p>			
3	<p>Refer to the flipchart on SMART objectives you have prepared in advance.</p> <p>Realistic terms means that the outcomes or objectives you seek to achieve are SMART:</p> <ul style="list-style-type: none"> Specific – described in precise or detailed terms Measurable – progress and achievement can be assessed and quantified Achievable – it can actually be accomplished with the time and resources available Realistic – it is a sensible and practical goal Time-bound – a specific time has been set to achieve the objective <p>Ask the groups to take 5 minutes to define an outcome for the issues they have been working on, making sure it meets the SMART criteria. Take another 5 minutes to debrief their answers.</p>	PEE	10	<p>Prepare the following SMART criteria on the flipchart in advance:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><u>SMART:</u></p> <ul style="list-style-type: none"> Specific – described in precise or detailed terms Measurable – progress and achievement can be assessed and quantified Achievable – it can actually be accomplished with the time and resources available Realistic – it is a sensible and practical goal Time-bound – a specific time has been set to achieve the objective </div> <p>During the group work, keep in mind that some outcomes will be harder to define in SMART terms, but encourage the groups to meet as many of the criteria as possible.</p>

Steps	Description	Type	Min	Note to the Trainer
4	<p>Introduce the 2nd step: Identify several options for reaching or achieving these outcomes</p> <p><i>This is where your base of evidence will be most useful. What have you learned from the work you have done on issue identification and research? What are the most efficient and effective routes to the outcomes you have defined in step one? Apply the following questions to the information you have gathered:</i></p> <ul style="list-style-type: none"> • <i>What are other policy areas with similar issues? How have these been addressed? Has this been successful or not?</i> • <i>What are other countries facing similar issues? How have they addressed these? Has this been successful or not?</i> • <i>If we were to address this issue innovatively and creatively, what would solutions look like?</i> • <i>What are those groups which are most affected by the problem asking for?</i> • <i>What are the recommendations of civil society leaders? The academic community?</i> • <i>What actions can be taken to address or neutralize the causes of a problem?</i> • <i>What actions can be taken to mitigate some of the symptoms or effects of a problem?</i> • <i>What approach (es) would best meet the needs of women? Men? Girls? Boys? Different minority groups?</i> <p><i>These questions serve as a filter mechanism. As they are applied to the information that has been gathered during issue identification and research, policy options for responding to an issue or problem begin to emerge.</i></p>	TP	5	

Steps	Description	Type	Min	Note to the Trainer
5	<p>Ask participants to return to (or remain in) their groups. Distribute the flipchart pages from the first exercise to the respective groups.</p> <p>Ask the groups to review the solutions or policy options they came up with in this first exercise of the workshop and assess them based on the discussion so far. Instruct the groups to answer the following questions:</p> <ol style="list-style-type: none"> 1. Do these solutions help them achieve the outcome they have defined? 2. What changes would they make, if any? <p>Give 7 minutes for work and 8 minutes for debrief.</p>	PEE	15	
6	<p>Introduce the 3rd step in the development of policy options: Check the viability of options</p> <p><i>Successful policy applies the principles of good governance to the realities of the political environment.</i></p> <p><u>Good Governance</u> <i>Standards for good governance require that all policy options are checked for risk, value for money and gender mainstreaming.</i></p> <p><i>There is always an element of risk involved in doing something differently. Check your policy options for the degree and type of risk, i.e., financial, physical, material, environmental or social. Is the amount of risk reasonable and manageable; does it justify the potential rewards?</i></p> <p><i>Any policy option that requires the use of public funds must also be assessed for its value for money – whether the benefits to society justify the costs.</i></p> <p><i>Consider which options represent a smart investment for the country and sound use of public funds. Ask whether spending money in this manner represents good</i></p>	TP	15	

Steps	Description	Type	Min	Note to the Trainer								
	<p><i>financial management, and also whether it reflects the values of society as well as those of your political party.</i></p> <p><i>Contemporary standards for good governance also require a sound gender analysis of policy proposals to ensure there is no inherent bias. Check your emerging proposals against the following criteria:</i></p> <ul style="list-style-type: none"><i>In terms of gender, what groups are most likely to be affected by the proposed policy and any required legislation to implement it?</i><i>What is the estimated impact of the policy and/or proposed legislation on these groups?</i><i>Does the policy change the activity patterns of men or women, and how?</i><i>Does the policy increase or decrease women or men’s workload (reproductive or productive)?</i><i>Who (men or women) would make the decisions and who would do the groundwork to implement the policy?</i><i>Would women and men have equal access to program events, benefits or services?</i><i>Who would benefit the most from the policy?</i> <p><i>In some cases, you’ll want to evaluate the impact of emerging proposals not only with regard to gender, but also on other groups, including: youth, elderly, urban or rural populations, people living in poverty and people with jobs.</i></p> <p><u>Political Environment</u></p> <p><i>There are also the realities of politics to consider. When policy proposals move from the development phase and enter the world of possibilities, they immediately confront the reactions and opinions of others. It is important to anticipate, understand and plan for a range of likely responses to any policy proposals, as these will significantly impact their viability.</i></p>			<table><tr><td>Environment</td><td>What is current public opinion on this issue? What is current public opinion of major political actors on this issue?</td></tr><tr><td>Supporters</td><td>Who is likely to support the policy? Why? Will their support be strong or weak? How can I maximize their support?</td></tr><tr><td>Opponents</td><td>Who is likely to oppose the policy? Will their opposition be strong or weak? What will their arguments be against the policy? How can I neutralize these arguments?</td></tr><tr><td>Stakeholders</td><td>Who is most likely to be affected by this policy? What degree of change will they have to adjust to? What is their initial reaction likely to be? What information or interaction do they need to support the policy?</td></tr></table>	Environment	What is current public opinion on this issue? What is current public opinion of major political actors on this issue?	Supporters	Who is likely to support the policy? Why? Will their support be strong or weak? How can I maximize their support?	Opponents	Who is likely to oppose the policy? Will their opposition be strong or weak? What will their arguments be against the policy? How can I neutralize these arguments?	Stakeholders	Who is most likely to be affected by this policy? What degree of change will they have to adjust to? What is their initial reaction likely to be? What information or interaction do they need to support the policy?
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Additional Exercise – Version A – 20'

Steps	Description	Type	Min	Note to the Trainer
7	Ask participants to, using the chart with questions written on the flipchart examine the political environment against their issues and policy proposals. Ask them to make a case for the most viable options. Give 15 minutes for this exercise and take 5 for debrief.	ANK	20	

SECTION 4 – Communicating Policy, Version A – 50'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Begin this section by commending participants on the work they have done so far. At this stage they have not just identified problems, but also begun to work through viable solutions. The policy development process is dense and challenging, and participants should be recognized for their work.</p> <p>However, the policy development process is not over yet. To begin the section on communication, remind participants of the importance of communication in politics. As participants will have noted from the stages of policy development, much of this work happens in an environment to which the public is not exposed. <i>So, if a political party or elected officials toil away to make a significant policy change and no one knows about it, in some ways it's as if it never happened. Poor communication also prevents good policy ideas from being implemented because they're not fully understood.</i></p> <p><i>Communication is even more important in the context of an election. Elections involve the competition of ideas as political parties and candidates put forward their visions for the country or local area. These visions are made reality through policy. Parties and candidates, therefore, need to be able to translate potentially complex policy proposals into clear pieces of political communication to targeted audiences.</i></p> <p>Explain that, therefore, effectively communicating a policy and its purpose is a critical component of policy development. <i>It helps build support for a proposal and momentum for getting it passed. It also helps ensure that a party, candidate or elected official gets credit for their hard work.</i></p>	TP	10	<p>Objectives of effectively communicating policy:</p> <ul style="list-style-type: none"> • Generate support for the policy • Communicates a party or candidate's ideas and vision for society • Inform the general public and those affected about the policy • Mobilize stakeholders who will be involved in implementing the policy • Help change attitudes or behavior targeted by the policy • Simplify complex issues so that they are better understood

Steps	Description	Type	Min	Note to the Trainer
	<p>Explain to participants that there is a clear framework for communicating policy. Introduce the policy communication framework and explain briefly each segment of it:</p> <ul style="list-style-type: none"> ● <u>Problem</u> – one or two sentences defining or describing the problem <i>Reason for Bringing the Problem Forward</i> ● <u>Forward</u> – explains why the problem is being brought forward ● <u>Symptoms</u> – lists how the problem manifests itself ● <u>Elaborate on the Symptoms</u> – for each symptom listed, explains what is happening and the impact of the symptom (why it matters) ● <u>Context</u> – explains the history of the problem: <ul style="list-style-type: none"> - What are the trends that contributed to the problem? - Are other geographic locations facing the same situation? ● <u>Vision for Desired Change (outcome)</u> – describes the change that the policy response is expected to achieve (the outcomes) and outlines the benefits of implementing the policy and the vision of what change the policy will bring ● <u>Policy Recommendation</u> – recommends a course of action, and describes the policy framed as a solution to the problem. <p>Explain to participants that the policy communication framework is a very useful way to think through how you will communicate policy.</p> <p>However, how this information is ultimately communicated depends on the target audience. Because it can be so complicated, it can be difficult to communicate effectively on policy issues. Explain to participants that there are two communication tools that help to make this easier:</p>			<p>Use the outline below to explain the policy communication framework, written on the flipchart in advance:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><u>Policy communication framework:</u></p> <p style="text-align: center;">Problem Reason for Bringing the Problem Forward Symptoms Elaborate on the Symptoms Context Vision for Desired Change (outcome) Policy Recommendation</p> </div> <p>To help participants better understand how to use storytelling, consider offering the following example or construct one of your own.</p> <p><i>A political party in government was trying to advance policies that would create greater investment in the country's roads and bridges. They put forward the message that 25% of the country's bridges were in a state of disrepair, but got little response.</i></p> <p><i>Then, they tried storytelling to communicate on this issue, using illustrations of families traveling together in their cars with the message, "One in every four bridges that you drive over with your children in your car is unsafe."</i></p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Write the following on the flipchart:</p> <ol style="list-style-type: none"> 1. Storytelling 2. Features vs. Benefits <p>Ask participants to define what is meant by each of these. Discuss, and explain the following:</p> <p><i>From childhood, we rely on narratives to help us understand the world. The ability to process new information quickly through stories remains with us throughout our lives.</i></p> <p><i>A good story personalizes policy. It:</i></p> <ul style="list-style-type: none"> • <i>Enables a leap in understanding by the target audience so that they can grasp the problem and what the proposed solution would look like in practice</i> • <i>Helps personalize a policy or issue so that the audience can better understand how it affects them</i> • <i>Is short: (no longer than two minutes); the impact is not through transferring large amounts of information, but by catalyzing understanding</i> • <i>Is generally true; they can come from research or experience on the issue, which describe its impact on individuals</i> • <i>Contains at least one statistic that validates the key point</i> <p>Explain that storytelling helps to communicate a problem and its proposed policy solution by putting these within the context of a story that makes it easier for people to grasp.</p>			

Steps	Description	Type	Min	Note to the Trainer																		
	<p>Features vs. Benefits means focusing on what the target audience gets out of the policy. There can be tendency among policymakers to focus on what a program contains (its features) rather than on what it will do or deliver (its benefits). But what an audience generally needs to know is what they will get out of a policy or program.</p> <p>Refer to the Feature vs. Benefit chart you have prepared in advance. Explain that it lists a number of products and policies, their features and benefits. Walk participants through the chart and ask them whether the difference between a feature and a benefit is clear.</p>			Prepare the following Feature vs. Benefit comparison table on the flipchart in advance. Feel free to modify either the products or the policies in the table and insert ones which would be familiar to participants.																		
				<table><tr><th>Policy or Product</th><th>Feature</th><th>Benefit</th></tr><tr><td>Toyota Corolla</td><td>1.8-Liter 4-Cylinder DOHC 16-valve engine with dual variable valve timing with intelligence</td><td>Reliable</td></tr><tr><td>Tetley's Teabags</td><td>A multi-layered cloth bag with hundreds more perforations and a round shape to encourage centrifugal movement of the contents</td><td>Delicious and refreshing tea</td></tr><tr><td>Micro Economic Policy</td><td>Targeted investment in key areas that promote economic growth</td><td>Jobs and a better future for young people</td></tr><tr><td>Youth Mentoring Program</td><td>Direct intervention strategy to deter youth people from engaging in high risk behaviors by offering positive alternatives in training and employment</td><td>Safer streets and less crime</td></tr><tr><td>Reducing Gender Inequalities in Education</td><td>Incentive program to persuade younger women and their families to remain in school until the completion of secondary education</td><td>Families will have more money and fewer financial burdens for the rest of their lives</td></tr></table>	Policy or Product	Feature	Benefit	Toyota Corolla	1.8-Liter 4-Cylinder DOHC 16-valve engine with dual variable valve timing with intelligence	Reliable	Tetley's Teabags	A multi-layered cloth bag with hundreds more perforations and a round shape to encourage centrifugal movement of the contents	Delicious and refreshing tea	Micro Economic Policy	Targeted investment in key areas that promote economic growth	Jobs and a better future for young people	Youth Mentoring Program	Direct intervention strategy to deter youth people from engaging in high risk behaviors by offering positive alternatives in training and employment	Safer streets and less crime	Reducing Gender Inequalities in Education	Incentive program to persuade younger women and their families to remain in school until the completion of secondary education	Families will have more money and fewer financial burdens for the rest of their lives
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If there is sufficient time during the Feature vs. Benefit discussion, see if participants can come up with additional examples and break them down into features and benefits. Use the large group format for this discussion.																						

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
2	<p>Ask participants to return to (or remain in their groups). Provide each group with flipchart paper and markers.</p> <p>Explain that they have two tasks to accomplish:</p> <ol style="list-style-type: none"> 1. Complete the policy communication framework for the issue they have selected and the outcome they have defined. 2. Create either a story or a feature vs. benefits outline to more effectively communicate their policy objectives. <p>Allow 20 minutes for groups to complete the tasks and 20 minutes for them to present and discuss their work.</p>	ANK	40	

SECTION 4 – Communicating Policy, Version B – 20'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Begin this final section by commending participants on the work they have done so far. At this stage they have not only identified problems, but begun to work through viable solutions. The policy development process is dense and challenging, and participants should be recognized for their work.</p> <p>However, the policy development process is not over yet. To begin the section on communication, remind participants of the importance of communication in politics. As participants will have noted from the stages of policy development, much of this work happens in an environment to which the public is not exposed. So, if a political party or elected officials toil away to make a significant policy change and no one knows about it, in some ways it's as if it never happened. Poor communication also prevents good policy ideas from being implemented because they're not fully understood.</p> <p>Communication is even more important in the context of an election. Elections involve the competition of ideas as political parties and candidates put forward their visions for the country or local area. These visions are made reality through policy. Parties and candidates, therefore, need to be able to translate potentially complex policy proposes into clear pieces of political communication to targeted audiences.</p> <p>Explain that, therefore, effectively communicating a policy and its purpose is a critical component of policy development. It helps build support for a proposal and momentum for getting it passed. It also helps ensure that a party, candidate or elected official gets credit for their hard work.</p> <p>Explain the objectives of effectively communicating policy written on the flipchart in advance.</p>	TP + DBR	20	<p>Objectives of effectively communicating policy:</p> <ul style="list-style-type: none"> • Generate support for the policy • Communicates a party or candidate's ideas and vision for society • Inform the general public and those affected about the policy • Mobilize stakeholders who will be involved in implementing the policy • Help change attitudes or behavior targeted by the policy • Simplify complex issues so that they are better understood <p>Use the outline below to explain the policy communication framework, written on the flipchart in advance:</p> <div> <p><u>Policy communication framework:</u></p> <p>Problem</p> <p>Reason for Bringing the Problem Forward</p> <p>Symptoms</p> <p>Elaborate on the Symptoms</p> <p>Context</p> <p>Vision for Desired Change (outcome)</p> <p>Policy Recommendation</p> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Explain to participants that there is a clear framework for communicating policy. Introduce the policy communication framework and explain briefly each segment of it:</p> <ul style="list-style-type: none"> • <u>Problem</u> – one or two sentences defining or describing the problem • <u>Reason for Bringing the Problem Forward</u> – explains why the problem is being brought forward • <u>Symptoms</u> – lists how the problem manifests itself • <u>Elaborate on the Symptoms</u> – for each symptom listed, explains what is happening and the impact of the symptom (why it matters) • <u>Context</u> – explains the history of the problem: <ul style="list-style-type: none"> - What are the trends that contributed to the problem? - Are other geographic locations facing the same situation? • <u>Vision for Desired Change (outcome)</u> – describes the change that the policy response is expected to achieve (the outcomes) and outlines the benefits of implementing the policy and the vision of what change the policy will bring • <u>Policy Recommendation</u> – recommends a course of action, and describes the policy framed as a solution to the problem. <p>Explain to participants that this structure is a very useful way to think through how you will communicate policy. As a larger group, use any remaining time to discuss how they would apply this communication framework to the policy issue on which they have been working.</p>			

CONCLUSION – 5'

Developing policy proposals starts with identifying issues and conducting research to gather the necessary evidence needed to fully understand the issue.

Analyzing the issue is the next step: understanding its cause and recognizing its symptoms.

The final policy proposal is selected from more than one policy option developed to achieve wanted outcomes, applying the principles of good governance to the political environment, and meeting SMART criteria.

Communicating policy is about using language that makes sense to the targeted audience and presenting a vision for what desired changes the policy will bring.

Campaign Skills Trainer's Guide

Module 6

Message Development

Creating Powerful and Persuasive Messages



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 6: MESSAGE DEVELOPMENT

Creating Powerful and Persuasive Messages

SESSION OVERVIEW:

As a candidate, having a compelling message is essential to persuading targeted voters to vote for you. This module covers the fundamentals of political communications and teaches participants what a message is, why it's important, and how to come up with an authentic and persuasive message for their campaign. Participants will practice crafting their own messages and using the message box tool during this module.

SECTIONS:

1. What is a Message?
2. Criteria for Effective Messages
3. Know Your Audience
4. The Challenge: Getting Heard
5. Developing Your Message
6. Testing the Message

LEARNING OBJECTIVES:

- Understanding what message is and the difference between a message and a slogan and a political platform
- Recognizing criteria for an effective message
- Understanding your audience
- Skills and tools for developing and testing a message

TIME: 90 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

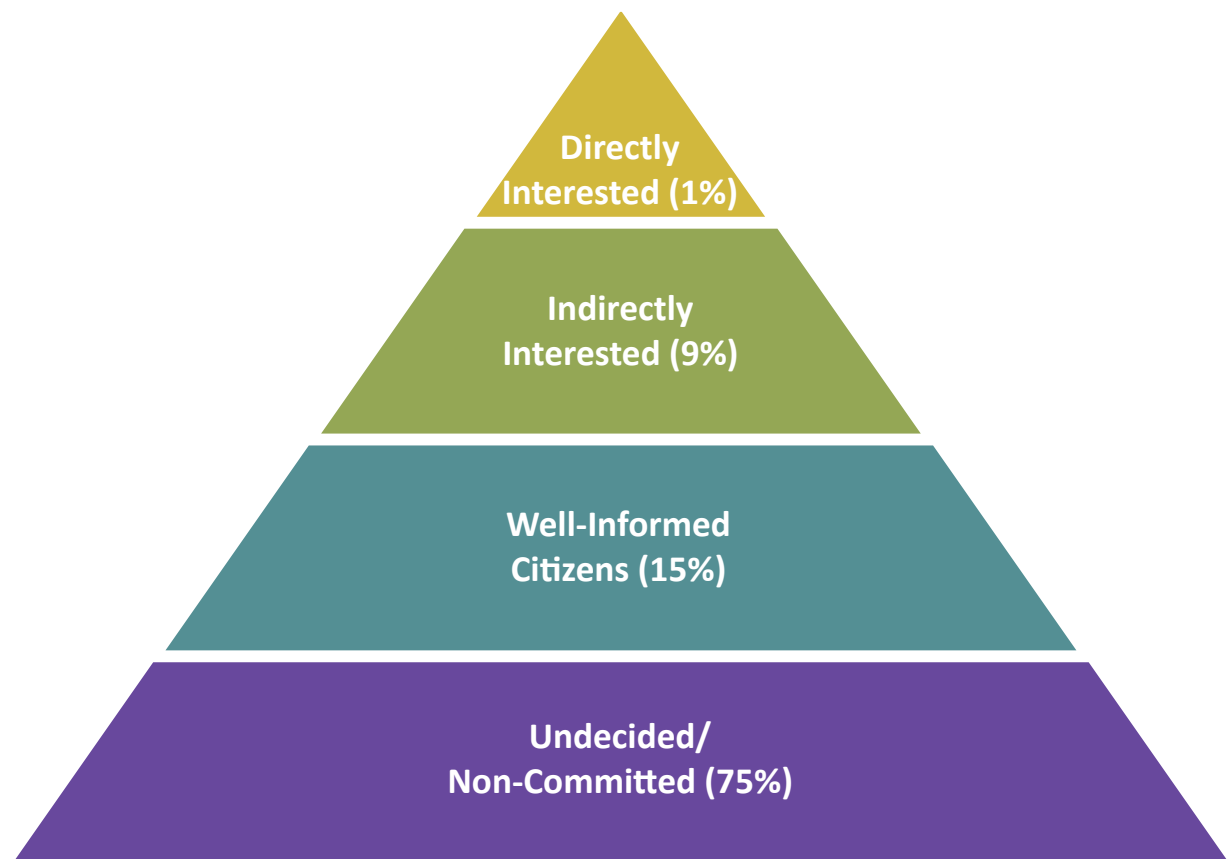
- MENA Regional Campaign School Workbook

PREPARATION:

- Writing on the flipchart in advance:
 - Agenda (optional – if it is not copied)
 - Learning Objectives
 - What is a MESSAGE?
 - A message is a short, truthful statement that lays out for voters why they should vote for you, and provides a contrast between you and your opponent(s).

Slogan	Message	Platform
<ul style="list-style-type: none"> • Very short • Limited information • Seen by all voters 	<ul style="list-style-type: none"> • Short • Substantive • Tailored to target voters 	<ul style="list-style-type: none"> • Long • Comprehensive • Not many people read it

- Criteria for Effective Message:
 - Short and Simple
 - Truthful and Credible
 - Important to Voters
 - Shows differences
 - Speaks to the Head and Heart
 - Targeted
 - Repeated
- The pyramid:



- The Message Box

What we say about us	What we say about them
What they say about us	What they say about them

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – What is a Message? – 9'

Steps	Description	Type	Min	Note to the Trainer						
1	Introduction to the session and learning objectives.	TP	1							
2	Ask the participants to think about what they would answer if asked: Why should I vote for you? Ask volunteers to share their answers with the group. Get one or two answers.	DBR	2	If nobody wants to volunteer you can ask if among the participants is somebody who ran for an office before and ask that person to share what was his or her message. Or, if there is nobody who ran you can look for somebody who actively participated in an election campaign before and who was explaining to people why they should vote for his/her party or a candidate.						
3	<p>Introduce a message saying that, in its simplest form, a message is a statement of why someone should vote for a party or a candidate on election day: Once you have decided who your target audience is, you need to decide what you will say to persuade them to vote for you. This is your campaign message. It tells the voters why you are running for office and why they should choose you over your opponents for the same position.</p> <p>Read a definition of the message written on the flipchart.</p>	TP	1	<p>Definition of a message:</p> <div><p><u>What is a MESSAGE?</u></p><p>A message is a short, truthful statement that lays out for voters why they should vote for you, and provides a contrast between you and your opponent(s).</p></div>						
4	<p>Continue explaining the difference between a slogan, a message and a platform, which you have prepared on the flipchart.</p> <p>As you clarify the characteristics of a slogan ask the participants to share some well-known slogans as an illustration.</p> <p>After you explain the characteristics of a platform as the participants if their family members who would support their party have ever read a party’s platform (as a confirmation that it is too long for many people to read it).</p>	TP	5	<table><tr><th>Slogan</th><th>Message</th><th>Platform</th></tr><tr><td><ul style="list-style-type: none">• Very short• Limited information• Seen by all voters</td><td><ul style="list-style-type: none">• Short• Substantive• Tailored to target voters</td><td><ul style="list-style-type: none">• Long• Comprehensive• Not many people read it</td></tr></table>	Slogan	Message	Platform	<ul style="list-style-type: none">• Very short• Limited information• Seen by all voters	<ul style="list-style-type: none">• Short• Substantive• Tailored to target voters	<ul style="list-style-type: none">• Long• Comprehensive• Not many people read it
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SECTION 2 – Criteria for Effective Messages – 25'

Steps	Description	Type	Min	Note to the Trainer
1	<p>As you have already mentioned few characteristics of a message, elicit those from the participants by asking what they think would be criteria for effective messages.</p> <p>After you get some answers say that a campaign will spend the majority of its resources getting the candidate or party's message out to targeted voters. To ensure the message will reach the voters with whom you need to communicate, it is important it meets the following criteria (have the criteria written on the flipchart in advance):</p> <ul style="list-style-type: none"> • Short and Simple • Truthful and Credible • Important to Voters • Shows differences • Speaks to the Head and Heart • Targeted • Repeated <p>Explain each of listed criteria:</p>	TP	5	<p><u>Criteria for effective messages:</u></p> <ul style="list-style-type: none"> • Short and Simple • Truthful and Credible • Important to Voters • Shows differences • Speaks to the Head and Heart • Targeted • Repeated
<p><i>Make it Short and Simple</i></p> <p>Messages must be concise. If you cannot effectively deliver your message to a voter in less than one minute, then you are likely to lose that voter's attention and possibly their vote. Your message must also be delivered in language the voters use and understand easily. Don't use technical words that the voters do not understand or have no real meaning to them. Creating a visual image in the minds of voters is much better than talking about abstract ideas. For example, talk about people, things and real-life situations to validate or illustrate your message.</p> <p><i>Must be Truthful and Credible</i></p> <p>The message needs to authentically reflect the values, practices, policies and history of the candidate or political party. It must be consistent with what has happened in fact. In addition, your message should be believable; candidates and political parties that make unrealistic promises simply add to voter apathy.</p> <p>Voters must believe that what you say, both about yourself and what you will do, is true. One way to establish trust is to back up your statements with validators such as proof of past experience and knowledge or know-how on issues relevant to your message.</p>				

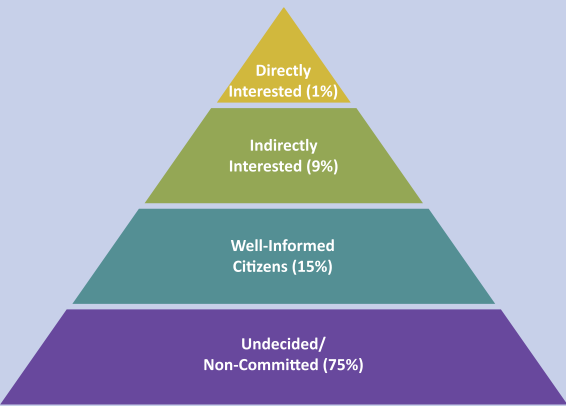
Steps	Description	Type	Min	Note to the Trainer
	<p>Must be Truthful and Credible</p> <p>The message needs to authentically reflect the values, practices, policies and history of the candidate or political party. It must be consistent with what has happened in fact. In addition, your message should be believable; candidates and political parties that make unrealistic promises simply add to voter apathy.</p> <p>Voters must believe that what you say, both about yourself and what you will do, is true. One way to establish trust is to back up your statements with validators such as proof of past experience and knowledge or know-how on issues relevant to your message.</p> <p>Important to Voters</p> <p>An effective message reflects the values and concerns of your target audience — the voters. Keep in mind the problems that voters face every day in their lives, not issues that politicians think are important to public policy. For example, voters are more likely to support candidates that talk to them about their jobs, their children’s education or their safety, than a candidate that talks about the budget, even though the budget may deal with all of these things.</p> <p>Show Differences</p> <p>Voters must make a choice between you and other candidates, or your party and other political parties. You need to make it clear to the voters how you are different from the others in the race by contrasting yourself with them. If every candidate stands for economic development and more jobs, then voters will have no way of making a clear choice. If, on the other hand, you support visible electoral reforms or ending corruption and your opponents do not, then the voters will have a very clear choice.</p> <p>Speak to the Head and the Heart</p> <p>Politics is an emotional business and politicians who appeal to the hearts of voters generally defeat those who appeal to their heads. This does not mean that you should abandon the intellectual basis of your party or candidacy, or that you should underestimate the intelligence of the voter. This means that you must find a way to tie your campaign message to the concerns of your voters and make it clear that you understand the problems they face every day.</p> <p>Target Your Message</p> <p>If your campaign message speaks to everyone, then in reality, it speaks to no one. The people who will vote for you are different from those who will not vote for you and both groups have different concerns. Your campaign must determine what these differences are and address your message to your likely supporters. In many cases, voters just need clear information about who really represents their interests. If they have that information, they will vote for that person or that party. Don’t fail to provide it.</p> <p>Repeat the Message</p> <p>Once your campaign determines what message will persuade your target voters to vote for your candidate, then you must repeat that same message at every opportunity. While you will be living and breathing your campaign and may get tired of repeating the same message, most voters are not paying very much attention to politics and will only hear your message a few times. For your message to register with the voters, they have to hear the same message many times in many different ways. So, if you change your message, you are only confusing the voters and missing an opportunity to communicate a message that will be remembered.</p>			

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
2	<p>Divide the participants into smaller groups (up to 5 people) and ask them to write down 2-3 political, or even commercial, messages they find especially compelling. Give 10 minutes for this activity.</p> <p>Ask each group to report back on the strongest example they came up with and the rest of the participants to give their feedback evaluating how much the example meets the criteria of an effective message.</p>	ANK	20	As you are facilitating participants' feedback and discussion if examples meet the criteria of an effective message, it is most likely that different people will find different messages strong. Always ask who was target for each message reminding them of targeting and setting the basics for the next section.

SECTION 3 – Know Your Audience – 10’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Referring to the points about targeting a particular audience previously made, tell the participants you will now picture the audience describing a persona who belongs to that audience.</p> <p>Regardless of how you will organize this activity, the participants should be given the following instructions: In your mind, begin to draw a mental picture of what a typical person from the audience looks like. How old are they? Are they male or female? What is their level of education? What do they do to earn a living? What clothes do they wear? What cars do they drive? What do they do for leisure or pleasure? What TV programs do they watch?</p> <p><u>Let them know it can be helpful to create a detailed profile of a persona representing a targeted audience, because it is easier to come up with effective messages for a person, even a fake one, than for a faceless audience. This is a technique widely used in the advertising industry.</u></p> <p>The more descriptions participants come up with the better. At the end you can ask them to try to draw a picture of a persona or personas described.</p>	DBR	10	<p>There is more than one way you can organize this exercise and it depends on circumstances:</p> <ol style="list-style-type: none"> 1. If you are doing this training as a part of multi-days long capacity building effort and you are working with the same group of participants who have previously heard about targeting and have gone through that module, you can organize this activity by asking them to go back to their findings in the exercise done in demographic targeting (Module 3, section 6) and start with writing down the groups of individuals that they identified as their target groups, which they will then describe and picture; 2. If you are doing this training separately from the rest of the topics elaborated in this Guide, you can ask each participant to think of the groups of people they need to persuade to vote for them picture people who would vote for him or her and make this exercise individual.

SECTION 4 – The Challenge: Getting Heard – 5’

Steps	Description	Type	Min	Note to the Trainer
1	<p>The introduction to this section and to the pyramid explanation should include following:</p> <p>Targeted voters receive thousands of messages every day – from the news, entertainment media, family, friends and neighbors, billboards, posters, television advertisements, radio, etc. Political parties are not just competing with their opponents, but with all of the other messages out there just to be heard.</p> <p>The fact that most voters are not very interested in politics makes things even more challenging. The pyramid on the flipchart gives a general breakdown of the level of interest in politics in most societies around the globe.</p> <p>And the explanation of the pyramid is:</p>	TP	5	<p>Draw the pyramid on the flipchart:</p> <p><u>THE PYRAMID</u></p> 
	<p>At the top of the pyramid are the people who are eagerly interested in politics. This makes up about 1% of the population. These are people who have a direct interest in the outcome of the elections, as it might affect their jobs or way of life. It includes political leaders and activists that spend a huge amount of their time and financial resources campaigning, or political analysts who make a living by commenting on what’s going on in politics. These people are going to listen to every word your campaign says, no matter how complicated you make it sound.</p> <p>The next segment on the pyramid is composed of people who are indirectly interested in politics. They make up about 9% of the population. This is a wider group that includes members of political parties, civil society organizations, trade unions, some employees of state-owned companies and public institutions, and professional organizations that could be affected by a change of state policies. The results of the elections might affect them, but won’t necessarily change their lives. This group will also be very interested in what you have to say.</p> <p>The next group is well-informed citizens, making up about 15% of the population. This segment of society includes all of those who like to read beyond the catchy headlines and who like to know what is going on in their societies. It frequently includes lawyers, journalists and school teachers, but it is not limited to these professions as you can find well-informed citizens in just about any social group. They are interested in what parties are saying in their campaigns and they will make sure they learn about you no matter how you craft your message.</p> <p>These first three groups usually already know who they are voting for. They understand the environment, follow politics and usually already have a political stance that is unlikely to change. Together, these three groups comprise 25% of the population.</p>			

Steps	Description	Type	Min	Note to the Trainer
	<p>It is the next and largest group on the pyramid that often has the biggest impact on politics. These are the people who can decide whether you win or lose the election. This group is 75% strong and includes ordinary citizens who live ordinary lives. They go to work if they have jobs, they spend time with their families and neighbors, and they watch popular shows on television.</p> <p>A big portion of this group doesn't vote and may never vote, but those who do make all the difference. Sometimes, as in the illustration below, they are simply busy with their own lives and don't have a lot of time to think or worry about politics. Keep in mind as well that at the same time your campaign is trying to communicate with them, they are also receiving multiple messages from other campaigns and other media. This can mean that they don't have a lot of information when it's time to vote, and can support a candidate or party based on information that's easily accessible to them, such as affiliation, appearance or who is likely to win.</p> <p>These voters typically don't have the time or the interest to pay much attention to political campaigns, and give volunteers little opportunity to actually talk to them. This is why, if you have a chance to talk to these voters, you need to make sure that your message is clear and relevant.</p> <p>This is why research and preparation are such important parts of your campaign. Voters in the base of the pyramid are not going to listen to you if you are not talking about issues that matter to them, which means they will not remember your message or recognize you on the ballot when and if they come out to vote.</p>			

SECTION 5 – Developing Your Message – 20'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Tell the participants that now they have enough information to be able to develop their own messages. Introduce them to three steps process:</p> <ol style="list-style-type: none"> 1. Answer the essential questions (which you either handout or you have them written on the flipchart); 2. Choose three words to describe yourself; 3. Write you own message using information from the previous two steps. <p>Allow 20 minutes for this activity.</p>	PEE	20	<p>The essential questions:</p> <div> <p>a. Why are you running for office? What problems are you running to solve?</p> <p>b. How will you solve these problems?</p> <p>c. What makes you a better choice than your opponents?</p> </div>

SECTION 6 – Testing Your Message – 20’

Steps	Description	Type	Min	Note to the Trainer
1	Draw the message box on the flipchart and explain how to use this tool:			
	The message box helps you determine what you will say when you talk about who you are and what you stand for in the context of a campaign, when voters are also hearing your opponents’ messages. It is a tool designed to help candidates and political parties design their messages and think through their election strategies thoroughly and methodically. Using the message box, you can determine what you will say during the campaign and how you will respond to your opponents’ attacks.			
	The message box is a simple square with four separate quadrants, each of which covers a specific aspect of electoral communication between a candidate or political party and their strongest opponent: what we say about us, what we say about them, what they say about us, and what they say about themselves.			
	The two quadrants at the top of the box are about what we are going to say in our campaign. The first box is what we are going to say about ourselves: our strengths, values, and agenda: the reasons people should vote for us. Next to it is what we might choose to say about our opponents: their weaknesses and vulnerabilities: the reasons people should vote against our opponent. The bottom half is what our opponent is saying. On the left is what they say about us: our weaknesses and vulnerabilities: the reasons people should vote against us; and on the right is what they say about themselves: their strengths, values, and agenda: the reasons people should vote for our opponent.			

Steps	Description	Type	Min	Note to the Trainer	
1	Ask for two volunteers – somebody who believes they have developed a strong message. Once you have selected two participants to volunteer ask them to come up in front and introduce them to the participants as two opposing candidates. And the other participants are voters.				
	Say that two of them will help you practice use of the message box. The group will first hear their messages, and then fill out the message box quadrant by quadrant.			Volunteer 1 about himself	Volunteer 1 about Volunteer 2
	Draw the message box on the flipchart and instead “volunteer 1” and “volunteer 2” write their names.			Volunteer 2 about himself	Volunteer
	Let the two volunteers read their messages.				
	Facilitate the participants’ feedback and write their comments in corresponding quadrants for about 12 minutes.				
	At the end you can ask the volunteers what they would change in their messages.				

CONCLUSION – 1'

Summarize the session:

- Having a compelling message is essential to persuading targeted voters to vote for you.
- A message is a short, truthful statement that lays out for voters why they should vote for you, and provides a contrast between you and your opponent(s), which is repeated throughout your campaign.
- Understanding your voters and their preferences, as well as your and your opponents' strengths and weaknesses are crucial for developing an effective message.

Campaign Skills Trainer's Guide

Module 7

Becoming a Powerful Communicator

Techniques and Tips for Effective Interviews and Speeches



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 7: BECOMING A POWERFUL COMMUNICATOR *Techniques and Tips for Effective Interviews and Speeches*

SESSION OVERVIEW:

Your audience learns more about you from how you communicate than from the words you say. In this module, participants will learn and practice effective public speaking and interview skills. This module features extensive practice sessions with feedback from peers and trainers.

SECTIONS:

1. Non-Verbal Communication
 - a. Voice
 - b. Image and Presentation
 - c. Body Language
2. The Stump Speech

LEARNING OBJECTIVES:

- Understand and practice skills for effective communication
- Learn the basic structure for an effective stump speech

TIME: 135 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)
- Small folded papers, one per participant, with an adjective written on each for exercise in section one
- Paper and pens for participants
- Each participant will need enough paper to write stump speech notes for every participant
- So, if there are 10 participants, each participant will need at least 10 sheets of paper plus enough pages for their notes for other aspects of the training

HANDOUTS:

- None

PREPARATION:

Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. Aspects of Non-Verbal Communication
 - Voice
 - Image and Presentation
 - Body Language

4. Image and Presentation

- Image creates an opportunity to communicate a message and no opportunity to communicate a message should be ignored in politics.
- What you wear and how you present yourself should be appropriate for your audience and for the occasion.
- Younger people and women are subject to higher levels of scrutiny about their appearance.
- Envision the image you want to project, and then put together the tools you need to make that vision a reality.

5. Examples of Body Language

- Standing with your hands on your hips
- Standing with your hands on your hips
- Pinching the bridge of your nose with eyes closed
- Standing or walking erect
- Arms crossed at chest
- Displaying open palms
- Failing to make eye contact/looking away
- Smiling, relaxed face
- Slightly tilted head
- Snapping your fingers

6. Stump Speech Structure

- Opening
- Connection
- Problem
- Solution
- Vision
- Call to Action
- Closing

7. Rules for Giving Feedback

- Constructive and helpful
- Focus on the positive aspects and strengths, as well as areas to be improved
- Address the skill or technique; it is not about the person
- Build up, don't tear down

KEY FOR THE TYPES OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer's Presentation

PEE – Participants' Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – Non-Verbal Communication – 55'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Welcome the participants and tell them that the name of the session you are about to start is “Becoming a Powerful Communicator.”</p> <p>Ask participants to write down three things about themselves – something interesting that other participants probably do not know about them. Two out of three things have to be truthful and one thing should be something they wish was truth. Give 2 minutes for writing.</p> <p>Invite one participant to read three things about him or her, and then ask the rest of the group to say which one was a wish. When people start guessing ask them to explain how they know or why they would pick that one. Elicit how they read body language and get information from a person’s voice.</p>	PEE + TP	8	<p>This session starts with an activity and a discussion. The simple exercise, “Three Things About Me,” will help illustrate that communication is more than words.</p> <p>Be ready with examples of what types of things people might write to help participants think through the exercise. Encourage participants to think of their own sporting skills, singing ability, artistic talent, academic achievements, aspects of their children or families of which they are particularly proud, travel or adventure, favorite sports teams, or dreams and aspirations. Alternatively, you can offer your own set of three things as a starting point.</p>
2	<p>Introduce the session:</p> <p><i>Becoming a powerful communicator is about more than writing a great speech or having a strong message; it’s also about how you use your image, voice and body language to connect with your audience. Studies have shown that an audience connects more easily with a speaker based on his or her tone of voice and physical gestures, rather than on the words the speaker says.</i></p>	TP	2	

Non-Verbal Communication: Voice – 55'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain that there are 3 core aspects of non-verbal communication:</p> <ul style="list-style-type: none"> • Voice • Image and Presentation • Body Language <p>Explain that this workshop will define and explore each of these, starting with voice.</p> <p>Move into the discussion on: voice:</p> <p><i>Your voice is a tool that adds music to the words that you are communicating. Music conveys mood and affects how we feel and how we respond to a message. Think about how you respond to the sound of a fast beat, a loud drum, a soft violin, a mournful cello, a strong singer, a dance rhythm. We not only hear music, we feel it.</i></p> <p><i>The same is true for your voice. It can say a lot about who you are and what you are trying to communicate. Are you confident, authoritative or in command? Are you friendly, approachable or trustworthy? Does the tone of your voice give the impression that you have something interesting to say?</i></p>	TP + PEE + DBR	20	<p>Consider writing each term on the flipchart paper as you name it:</p> <ul style="list-style-type: none"> • Voice • Image and Presentation • Body Language <p>To help participants understand the potential impact of voice as a communication tool, name two well-known musicians or bands: one with a traditional style and one with a modern or popular style. Note and discuss the distinct reactions from among different participants as you ask them how each makes them feel.</p>
2	<p>To illustrate this point about the power of the voice, pass out folded papers to 5 or 6 participants. Each paper should have a different adjective or mood written on it. Ask participants to open their paper and keep its content secret. Clarify that all participants understand the term written on their paper.</p> <p>Then, ask each participant with a folded paper to say the phrase, “Turn out the light” (one at time) in the style written on their paper. You can offer an example and help set participants at ease by saying the phrase in an excited manner.</p>			<p>In advance of the workshop, prepare 5 or 6 small folded papers with a descriptive mood or adjective written on each for the “Turn out the light” exercise. Options include: bored, shy, romantic, angry, desperate, afraid, wishful, exhausted, shifty, etc.</p> <p>During the “Turn out the light” exercise, ensure all participants understand the description or mood written on the folded paper you have given them. If they don’t, offer further explanations individual and quietly so that others cannot hear.</p> <p>Collect the papers after the exercise. You will use them again during the discussion on body language.</p>

Steps	Description	Type	Min	Note to the Trainer
2	<p>After all the selected participants have gone, ask the rest of the participants to guess what mood or adjective was written on each speaker's paper.</p> <p>Debrief the exercise by asking participants:</p> <ul style="list-style-type: none"> • What did you notice about how people used their voices to convey information? What about mood? • Could you hear and feel the difference that tone of voice can make in communication? • Even though it was the same words being spoken, did the message feel different depending on tone? 			
3	<p>Ask participants to think about their own voice in the context of making a speech, and how they can use this as a communication tool. Invite 1 or 2 participants to briefly describe speeches they have seen or delivered themselves in which the voice has been effectively used.</p> <p>Debrief the discussion by making the following points:</p> <p><i>Use your voice to let your listeners know when you are about to make one of your main points. You can speed up or slow down your speech, make your voice quieter or louder, or pause at a key point. To hold an audience's attention, a good speaker uses variety in his or her voice and pacing to create drama and interest.</i></p> <p><i>Use inflection and rhythm to keep your audience engaged. Try projecting your voice to make sure your audience can hear you and to keep energy in your delivery. Practice sending your voice to the back of the room, but do this without shouting.</i></p>			<p>During the discussion on using your voice as a tool, refer back to occasions where participants did exactly this during the "Turn out the light" exercise. Point out where someone might have used a pause or a change in pace to emphasize a point, even in that short phrase. Highlight any variations in tone to create drama or interest.</p>

Non-Verbal Communication: Image and Presentation

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce image and presentation by asking participants what these terms mean and what comes to mind when they hear or use the words “image” and “presentation”.</p> <p>Facilitate a brief discussion on these terms to get a sense of what participants’ preconceptions are about image and presentation. Then, define the terms within the context of non-verbal communication:</p> <p><i>Your image is the type of person and personality you portray through your physical appearance. This includes how you carry yourself physically, the type of self-image you convey to others and even the manner in which you dress and groom yourself.</i></p> <p>Ask participants why these might be important factors in politics in particular. Look for answers about the lasting impact of first impressions, how busy voters are and therefore how we only have a short amount of time to convey a message, the importance of being able to communicate trust and other similar ideas.</p> <p>Debrief the discussion by making some of the following points:</p> <p><i>In politics and campaigns, first impressions are made quickly and a negative impression can be difficult to overcome. In a split second, an audience will form opinions about you in terms of your background, your experience, your trustworthiness, your skills and abilities, your moral character and your success at your current or previous work, all based on their interpretations of the visual image you project.</i></p> <p><i>It is therefore important that we present yourselves in a way that conveys a positive and engaging image.</i></p>	TP	5	

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask participants to, on their own, come up with one word or a short phrase that describes their own personal image as a political activist. Give everyone just 1 minute to write this down on a piece of paper. When they have finished, ask several participants to share what they have written. (If there is sufficient time, ask all participants to share.)</p> <p>After this brief discussion, ask participants what it was they thought about when considering their own image. In other words, what are the aspects of our appearance that make up our image and presentation?</p> <p>Brainstorm a list as a large group and write it on the flipchart. Look for answers such as:</p> <ul style="list-style-type: none"> • Style of clothing: conservative, business-like, modest, etc. • Color of clothing: bright colors vs. dark colors • Jewelry • For men: facial hair • For women: make-up (amount and type) • Hijab vs. no head scarf • Hair and hair styles • Teeth • Facial expressions; smile • Posture • Personal grooming (e.g., hair neat and tidy) <p>Debrief the list and ask participants which of these were on their mind as they thought about their own image and presentation and, looking at the list now, if they would change the words they had written for the description of their own image, or if there are any aspects of their image or presentation they think they need to work on.</p>	TP + DBR	15	<p>Write the following on the flipchart in advance for the conclusion of the discussion on image and presentation:</p> <ol style="list-style-type: none"> 1. <i>Image creates an opportunity to communicate a message, and no opportunity to communicate a message should be ignored in politics.</i> 2. <i>What you wear and how you present yourself should be appropriate for your audience and for the occasion.</i> 3. <i>Younger people and women are subject to higher levels of scrutiny about their appearance.</i> 4. <i>Envision the image you want to project, and then put together the tools you need to make that vision a reality.</i> <p>During the group list brainstorm on the aspects of our appearance that make up our image and presentation, a number of factors may come up that are more about body language than image, such as facial expressions, posture, hand gestures, etc. It's fine to accept these and note that they will be dealt with in the next section, but keep the discussion focused on the physical aspects of personal appearance as much as possible.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Conclude the discussion by delivering a few key points about image and presentation. Refer to the flipchart you have prepared in advance:</p> <ol style="list-style-type: none"> <i>Some of these issues can feel trite or superficial. However, remember that image creates an opportunity to communicate a message, and no opportunity to communicate a message should be ignored in politics.</i> <i>What you wear and how you present yourself should be appropriate for your audience and for the occasion. Find a balance between being comfortable and creating an image that reflects your style of leadership.</i> <i>Candidates and political activists who are younger or female are often subject to higher levels of scrutiny about their appearance than older and male politicians. Criticism comes from both friends and strangers.</i> <i>Be aware of yourself and the image you are conveying. Envision the image you want to project, and then put together the wardrobe and other tools you need to make that vision a reality.</i> 			

Non-Verbal Communication: Body Language

Steps	Description	Type	Min	Note to the Trainer
1	<p>Remind participants that the 3rd core element of Non-Verbal Communication is body language.</p> <p><i>Before we open our mouths to speak, our body language is already sending messages to our audience. Body language is the gestures, postures, and facial expressions that we use to communicate feelings or opinions, even when we're not fully aware that we're doing this.</i></p> <p><i>Reveal the list of examples of body language on the flipchart. Briefly discuss each one by asking participants what each communicates. Do not give the answers (in parenthesis) until participants have been able to give their impressions:</i></p> <ol style="list-style-type: none"> 1. Standing with your hands on your hips (readiness or aggression) 2. Pinching the bridge of your nose with your eyes closed (dislike, displeasure, negative evaluation) 3. Standing or walking erect (confidence) 4. Arms crossed at chest (defensive) 5. Displaying open palms (openness, sincerity) 6. Failing to make eye contact/looking away (not trustworthy or sincere) 7. Smiling, relaxed face (openness) 8. Slightly tilted head (interest) 9. Snapping your fingers (depends: in some countries this is a sign of impatience and/or considered rude; in others it's a simple way of communicating a need for attention) <p>Ask participants if there are any other gestures or facial expressions, particularly those which might be more common in political communication, which they would like to discuss. Lead a brief discussion about what these might be and what they might mean.</p>	DBR	10	<p>Prepare the following flipchart in advance of the training:</p> <ol style="list-style-type: none"> 1. Standing with your hands on your hips 2. Pinching the bridge of your nose with your eyes closed 3. Standing or walking erect 4. Arms crossed at chest 5. Displaying open palms 6. Failing to make eye contact/looking away 7. Smiling, relaxed face 8. Slightly tilted head 9. Snapping your fingers <p>Different participants may have different opinions about what each example of body language means, based on their own experience. That is fine. It is not important that everyone comes to the same conclusion about these. The key learning point is to be aware of our body language and to understand that we are constantly communicating to others with our gestures, how we carry ourselves and with our facial expressions.</p>

Steps	Description	Type	Min	Note to the Trainer
2	<p>Distribute the folded papers (with an adjective written on each, distributed for the first exercise in the second step on voice) to 5 or 6 different participants who did not do the voice exercise. Ask each participant to open their paper, read what it says and keep the contents secret. Ensure participants understand the word or phrase written on their paper.</p> <p>This time, ask all participants to line up in the middle of the room, making two rows with enough space to walk between the two rows. One by one, ask the participants who have received the papers to walk down the middle of the two rows of people, using only body language to convey the adjective on their paper. The rest of the participants try to guess what each person is expressing.</p> <p>When each participant has completed their walk, ask all participants to return to their seats and lead a debrief of the exercise. The following questions could be included:</p> <ul style="list-style-type: none"> - Was it difficult or easy to guess the person's mood using just body language? Why? - Can shy look like uninterested? - Can passion look like anger? - Is it possible to control your mannerisms, or are you stuck with them? 	PEE	10	You will need the small folded papers with a descriptive mood or adjective written on each for the sessions – the same ones used for the “Turn out the light” exercise.

SECTION 2 – The Stump Speech – 55’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain to participants that we are now going to move our discussion about communication into the world of politics by looking at one of the most common and versatile forms of political communication: the stump speech.</p> <p>Explain what the stump speech is: <i>The “stump speech” is a term that describes the core speech that a candidate or party leader gives on almost every occasion with appropriate modifications for different audiences and situations. Your stump speech introduces you to voters, lets them know what you are running for and what you plan to do if elected, and tells them about the kind of person you are.</i></p>	TP	1	
2	<p>Ask participants: What do you think makes a good speech? Record their answers on the flipchart.</p> <p>Review what participants’ have suggested. Debrief the brainstorm by guiding participants towards the importance of structure, consistency and preparation in putting together a good speech. Point out that these are some of the reasons why every candidate or party leader should prepare an effective stump speech.</p>	PEE	4	
3	<p>Reveal the bullet points that you have written on the flipchart. Explain that this is the outline of a stump speech structure. Explain that this structure can be used to write a speech that is 90 seconds, 5 minutes or 10 minutes long.</p> <p>Walk participants through each aspect of the structure, explaining the purpose of each in a bit more detail. Pause as needed if participants have questions.</p> <ul style="list-style-type: none"> Opening – Say your name, what you are running for, and why. 	TP	15	<p>Prepare the following on the flipchart in advance:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><u>Stump speech structure:</u></p> <ul style="list-style-type: none"> • Opening • Connection • Problem • Solution • Vision • Call to Action • Closing </div>

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> • Connection – Establish a connection with the audience by demonstrating a shared concern. • Problem – What problem are you running for office to solve? How does it affect the audience? Describe the problem and say why you care about it. • Solution – Describe your solution and how it benefits voters. What specifically will you do or fight for if elected? • Vision – Describe how things could be better and what kind of future you will work for. How would the community be different if this problem were solved? • Call to Action – Ask your audience to make a difference by voting for you and supporting your campaign. • Closing – Summarize why you are running, restate your call to action and thank the audience. 			<p><u>Explore each step of the structure in as much detail as participants require. Some participants may need examples. In this case, consider offering or writing the following example of how one candidate, Samia Habib, used the stump speech formula in her campaign:</u></p> <p>1. Opening → Say your name, what you are running for, and why.</p> <p><i>“Hello. My name is Samia Habib and I am a candidate for the local council. I am running to make a difference in the lives of the people I grew up with in this village.”</i></p> <p>2. Connection → Establish a connection with the audience by demonstrating a shared concern.</p> <p><i>“I would like to talk to you about problems that I can solve if you elect me. One of the concerns I share with you is our village’s financial problem. Everyday, I see my brothers and sisters having a difficult time finding the money to buy oil or salt in the market...”</i></p> <p>3. Problem → What problem are you running to solve? How does it affect the audience? Describe the problem and say why you care about it.</p> <p><i>“I have seen a great number of people who are having many difficulties raising enough money to survive. The people of this village do not have enough opportunities for making a living. Many voters have shared with me their frustrations about this important issue.”</i></p> <p>4. Solution → Describe your solution and how it benefits voters.</p>

Steps	Description	Type	Min	Note to the Trainer
				<p><i>"I believe that we must make small scale income generation our top priority. If I win this election, I promise to improve our village by bringing more income-generating opportunities here. If I am elected, I will work to involve more people in small income-generating projects. As a result, their financial problems will improve."</i></p> <p>5. Vision → Describe how things could be better and what kind of future you will work for. How would the community be different if this problem were solved?</p> <p><i>"I want you to imagine what our village could be like if I am elected. I will bring in new investment to support local businesses and income-generating projects providing villagers the extra money they need to supplement their farming. People will not be struggling just to meet their basic needs. Please vote for me so that I can make this vision of a prosperous, happier village come true."</i></p> <p>6. Call to Action → Ask your audience to make a difference by voting for you and supporting your campaign.</p> <p><i>"Lastly, I would like to say that there is something you can do to make a difference. Your vote would allow me to work every day for the development of our village."</i></p> <p>7. Conclusion → Summarize why you are running, restate your call to action and thank the audience.</p> <p><i>"In order to help me improve our village's economic situation, I request that you vote for me, Samia Habib. Thank you."</i></p> <p><u>Ensure participants fully understand each aspect of this structure before moving to the next step.</u></p>

Steps	Description	Type	Min	Note to the Trainer
4	<p>Once you are assured that participants have a comfortable understanding of each aspect of the stump speech structure, assign the following task:</p> <p><i>Following the formula for effective speeches outlined on the flipchart, write your own one-minute stump speech. You can write it for yourself if you are a candidate or hope to be one soon, or on behalf of another candidate if you are a member of a campaign team or political party staff.</i></p> <p>Allow 10 minutes for writing.</p>	ANK	10	<p>The amount of time this exercise takes will obviously depend on how many participants are in your group. It's best if all participants deliver their speeches. However, if you are short on time or have a large group, ask for volunteers. Select 2-3 people to give their speech who have volunteered, and 2-3 people to give their speech who have NOT volunteered. If you have another trainer or facilitator to help, you could also break the training group into two and use two rooms so you can get through twice as many speeches in the same time.</p>
5	<p>Advise participants that, since preparation and practice are the keys becoming a powerful communicator, we are now going to practice together. Let them know that each person is now going to give their stump speech and that both trainers and participants are going to offer feedback. Refer participants to the flipchart page you have prepared in advance and instruct participants on how to give feedback:</p> <p><u>Rules for Giving Feedback</u></p> <ul style="list-style-type: none"> • Constructive and helpful • Focus on the positive aspects and strengths, as well as areas to be improved • Address the skill or technique; it is not about the person • Build up, don't tear down <p>Ask all participants to bring their speeches, their chairs, some paper and a pen to the middle of the room. Ask participants to arrange their chairs in a circle.</p> <p>Once participants have arranged themselves in a circle ask them to take out their paper and pens. Advise them that they will use these to create a feedback form for every participant's speech.</p>	ANK	35	<p>Prepare the following on the flipchart in advance:</p> <p><u>Rules for Giving Feedback</u></p> <ul style="list-style-type: none"> • Constructive and helpful • Focus on the positive aspects and strengths, as well as areas to be improved • Address the skill or technique; it is not about the person • Build up, don't tear down <p>It is important that as the trainer, you lead by example in offering constructive feedback. This will prevent the atmosphere from becoming too competitive or unnecessarily critical. Public speaking is one of the most difficult things for participants to do in any training, so maintaining a positive learning environment is vital.</p> <p>The Keep/Change forms are an important learning tool for participants. Often during public speaking exercises, participants are too nervous to remember what is being said during the feedback session. Having feedback in writing gives them a written record which they can use as they continue to work on their communication skills.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Instruct participants that at the top of each page, they will write the name of whoever is delivering his or her speech. Underneath, they should create two columns, one titled “Keep” and the other titled “Change.” You can draw the following on the flipchart to show participants what this should look like.</p> <p>Name of Speaker:</p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <u>Keep</u> </div> <div style="text-align: center;"> <u>Change</u> </div> </div> <p>Explain how these forms will work:</p> <p><i>In the “Keep” column, write down things that the speaker did very well and should continue to do or build on. In the “Change” column, note any aspects of the speaker’s speech or communication style that need more work or attention. You will give the completed sheet to the speaker once they have given their speech and received verbal feedback from the entire group.</i></p> <p>Ensure all participants understand the process. Ask for a volunteer to go first, delivering his or her stump speech. If there are no volunteers, pick someone reminding participants that everyone will have to do this at some point.</p> <p>After each speech, facilitate quick verbal feedback from other participants and offer your own. Instruct all participants to hand the speaker their respective Keep/Change forms.</p>			<p>Make sure you time the speeches and stop each speaker at the 1 minute limit. Learning to keep to the time – and still get your message in – is an important communication lesson as well.</p>
6	<p>Wrap up the session with the following:</p> <p><i>Improving communication skills includes developing an effective structured stump speech, as well as working on body language, voice, and presentation and image that support and strengthen the message we want to convey.</i></p>	TP	1	

Campaign Skills Trainer's Guide

Module 8

Building a Communications Strategy *Tactics, Tools and Techniques for Reaching your Audiences*



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 8: BUILDING A COMMUNICATIONS STRATEGY *Tactics, Tools and Techniques for Reaching Your Audiences*

SESSION OVERVIEW:

Communicating to voters and potential supporters through the media is a challenge for every campaign. This module covers the tools and skills needed to generate attention for your campaign and communicate your message through both traditional (television, radio, newspaper) and new (online, bloggers, social media) media.

SECTIONS:

1. Developing a Strategic Communication Plan
2. Organizing Effective Media Events
3. New Media Communication
4. Working with the Media

LEARNING OBJECTIVES:

- Understanding strategies and useful tools for generating coverage in both traditional and new media
- Planning and organizing a media event

TIME: 160 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- Planning a Media Event Worksheet

PREPARATION:

Writing on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. Developing a strategic communication plan:
 - Determine your objective(s)
 - Define your key audiences
 - Identify the most important media outlets for your campaign
 - Come up with a list of story ideas that promote and advance the campaign's message
 - Create a tactical outreach plan of events and activities
4. Media event: any campaign activity designed to generate press coverage.
5. Milestones: events highlighting key markers that demonstrate a campaign's success.
6. Criteria for an effective media event:

- It's newsworthy
- It reinforces the campaign's message
- There is a clear, interesting visual for television and photographs
- Campaign supporters are plentiful and enthusiastic
- The candidate's comments are concise and on message
- The time and place are convenient for the press to attend

7. Planning the event:

- What news are you making? What headline do you want?
- How will you tell your story visually?
- Pick location and time convenient to reporters
- Get permission to hold the event
- Prepare media advisory and press release
- Select, invite, brief and confirm guest speakers
- Plan needed materials and equipment

8. Before the event:

- Send media advisory to all reporters and news outlets
- Invite campaign supporters
- Secure permits if needed
- Arrange for special equipment
- Write out and practice the candidate's statement
- Finalize and copy the press release and press kit
- Confirm other speakers or special guests
- Call reporters to pitch the event and ask if they plan to attend
- Designate one person as "stage manager"
- Finish location set up at least an hour before the event starts

9. During the event:

- Thank media, supporters and guests for attending
- Greet reporters at registration table; ask them to present credentials and sign in
- Make sure all event speakers know the order of speakers and who the stage manager is
- Distribute press releases to reporters
- Make sure all reporters and camera operators have access to electricity and anything else they need
- Take plenty of photos during the event, from different angles and perspectives
- Post and tweet live from the event to the campaign's social media networks

10. After the event:

- Immediately send the press release and photo to all news outlets, including bloggers
- Post coverage of the event on social media networks and send it to key supporters
- Thank reporters who covered the event

11. New media:

- Social Networking sites → Facebook, LinkedIn
- Blogs and Micro-blogs → Twitter, Blogger, Tumblr, WordPress
- Video Hosting → YouTube, Blip.tv
- Instant Messaging → Pidgin, Skype, WhatsApp
- SMS and Text Messaging → Blackberry groups, SMS sites

- Photo and Image Sharing → Flickr, Instagram, Smilebox
- Social Bookmarking → Digg, Reddit, Pinterest

12. Digital Advocacy:

- Digital advocacy: efforts to organize people using new media to take social or political action.

13. Using New Media for Campaigns:

1. Strategic Review: What is your goal? Where are your supporters? Where are your target voters?
2. Evaluate the Time and Resources You Have
3. Choose 1 or more Platforms: start small and build
4. Develop Systems for Managing Your Digital Advocacy Efforts

14. Working with the Media:

1. Develop relationships with key editors, reports and bloggers
2. Stay in touch
3. Understand what is newsworthy
4. Always be truthful and accurate
5. Don't be afraid to say "I'm not sure" then get the answer
6. Understand their limits and needs
7. Respond quickly to calls
8. Provide reporters with information in a format they can use
9. Anticipate their need for content and pitch stories
10. Stay on top of the story
11. Address problems and move on

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer's Presentation

PEE – Participants' Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – Developing a Strategic Communication Plan – 60'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review learning objectives.	TP	2	
2	<p>Ask the participants to list all the ways their campaign or party use to reach voters through the media. Write their answers on the flipchart. Point out that some of the listed approaches require financial resources (such as direct advertising and access to media outlets), but:</p> <p><i>Most campaigns have to rely more on earned media than paid media for financial reasons. In this situation, your campaign is in less control of how much coverage it will get as well as how it is represented in the media. One of the main purposes of constructing a media strategy is to ensure that the message that appears in the newspapers, on the news or in a blog is the one that you want your target audience to see and hear.</i></p>	DBR	7	By asking the question about different ways to get media coverage, you will learn existing habits and understanding of how media coverage works, as well as be able to assess if participants take a proactive and strategic approach. At the same time, you are getting participants to focus on the topic and you are setting the context of the session.
3	<p>Introduce Developing a Strategic Communication Plan section:</p> <p><i>A strategic communications plan, or media strategy is your plan for getting positive coverage of your campaign through the media that your target voters use the most, in order to communicate your message to these voters.</i></p> <ol style="list-style-type: none"> <i>Determine your objective(s);</i> <i>Define your key audiences;</i> <i>Identify the most important media outlets for your campaign;</i> <i>Come up with a list of story ideas that promote and advance the campaign's message, and,</i> <i>Create a tactical outreach plan of events and activities designed to generate the coverage you want and on the platforms you need in order to reach your key audiences.</i> 	TP	8	<p>Write developing a strategic communication plan steps on the flipchart in advance:</p> <div> <p><u>Developing a strategic communication plan:</u></p> <ol style="list-style-type: none"> <i>Determine your objective(s)</i> <i>Define your key audiences</i> <i>Identify the most important media outlets for your campaign</i> <i>Come up with a list of story ideas that promote and advance the campaign's message</i> <i>Create a tactical outreach plan of events and activities</i> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>1. What is our objective? What do we want to achieve?</p> <p><i>Like all aspects of your campaign, putting together a solid media strategy starts with thinking through what it is you want or need to achieve. What is the size of the audience you are trying to persuade? Is it large, manageable or small? Is media the best way to reach them, or is direct voter contact going to be more effective?</i></p> <p><i>What about the image or profile of the political party or any candidates? Are there any policy ideas or issues you need to advance to change the terms of the debate around an election?</i></p> <p>2. Who is the campaign's target audience?</p> <p><i>Who are the groups of voters with whom your campaign is trying to communicate?</i></p> <p>3. Which media outlets do our target audience(s) relies on for information? What are the most important media outlets to the campaign?</p> <p><i>Think about how each group of your campaign's targeted voters get their information. What media outlets do they rely on and use regularly? Consider all forms of media, both traditional and new, and whether infrastructure (for example, regular electricity or Internet service) will affect their access to various outlets.</i></p> <p><i>In the Middle East and North Africa, most voters get most of their information from watching television. But it's not always easy to get television coverage for campaign events, so consider what other media outlets your targeted voters rely on for information. Are there special media outlets that reach certain groups of voters, such as minority groups, students, or people living in certain neighborhoods or remote areas? Do groups such as young people or women consume media differently?</i></p>			

Steps	Description	Type	Min	Note to the Trainer
	<p>Once you know how your target audiences get their information, single out the ones on which your campaign can actually get coverage. These outlets become priorities for your media outreach strategy.</p> <p>As an example, one campaign might target the large, commercial television stations in the area, because most voters in their target groups watch a lot of television and these companies are likely to give some form of coverage to all parties. Another campaign may recognize that they are unlikely to get television coverage because the station's owners support a different party, or because these stations are unlikely to consider the campaign a priority. In this situation, the campaign might focus on a combination of newspapers, radio, and new media instead.</p> <p>4. What are the stories we want the media to cover that promote and advance the campaign's message?</p> <p>What kind of coverage does your campaign want to get? Do you want the press to focus on the issues that support your candidate's or pr party's central message, like covering the unemployment crisis and various candidates' plans to address job growth? Are you looking for coverage of your candidate's background and life story? Do you want stories that demonstrate that the campaign has a growing amount of public support? Come up with a list of stories you would like to see reported by your targeted media outlets.</p> <p>5. What strategies and tactics will your campaign use to get your priority media outlets to deliver your message to your targeted voters?</p> <p>Strategies and tactics are the specific actions your campaign takes to actually gain media coverage, particularly earned media.</p>			

Steps	Description	Type	Min	Note to the Trainer
4	<p>Divide the participants into groups of up to 5 and ask them to first come up with:</p> <ol style="list-style-type: none"> 1. The objectives 2. The audience(s) and 3. Primary and secondary media outlets <p>Give 10 minutes for this activity and 5 more for debrief.</p>	PEE	15	<p>If you are doing this session after you have done previous modules, the participants will already have defined their target audience(s), so they should just go back to findings from the targeting module and they could stay with the same groups as before.</p> <p>You are not assigning working on the strategies and tactics yet – that is going to be the next step.</p>
5	<p>After the participants have defined their objectives and audience(s), as well as their primary and secondary media outlets, go back to the list of different ways to get media coverage they have developed in the beginning and ask them to name those which they can use to earn media and invite them to discuss about what can be done to maximize earned media opportunities and attract media coverage. Write all their answers on the flipchart and try to elicit following:</p> <ul style="list-style-type: none"> - Using media events - Having good working relationship with media <p>Define a media event:</p> <p><i>A media event is any campaign activity designed to generate press coverage. Media events are more interesting for the press to cover than press conferences, because there is an activity to report on, and usually a visual image to show. Media events are the most powerful way to tell your campaign's story and bring your message to life, because you control the message, the speakers, and the visual picture. Media events can be site visits to locations (schools, health centers, factories, parks, etc.) to highlight certain issues, campaign activities (rallies, meetings, door-to-door canvassing), speeches, and debates.</i></p>	DBR	13	<p>Definition of a media event on the flipchart:</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><u>A media event</u> is any campaign activity designed to generate press coverage.</p> </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask the participants to list some media events they could do to get media coverage and strengthen the message. Write their answers on the flipchart. You are looking for: conventions, receptions, public discussions, rallies, mass events (concerts), fairs, etc.</p> <p>Then, introduce the idea of campaign milestones:</p> <p><i>Milestones are events that receive special attention because they are connected with key occurrences during the campaign or with something that measures your success. For example, filing candidate registration papers with lots of signatures of support or receiving endorsements from important community leaders show that your campaign is competitive and newsworthy.</i></p> <p>Ask the participants to list some other campaign milestones events and write their answers on the flipchart. You are looking for: announcing your candidacy, receiving endorsements, reaching fundraising goals, meeting party registration deadlines, launching advertising or social media activities, releasing policies, platforms or manifestos, canvassing and other major campaign volunteer activities, hosting voter registration drives, etc.</p>			<p>What milestone events are:</p> <div> <p><u>Milestones</u> are events highlighting key markers that demonstrate a campaign's success.</p> </div>
6	<p>Ask the participants to look back into their groups' findings from the previous exercise (objectives, key audiences, media outlets) and taking into consideration different types of events and campaign's milestones to come up with three or four examples of a campaign events which would advance their message, keep their supporters engaged and would be interested enough to appeal to the news media.</p> <p>Give 10 minutes for this activity and spend 5 minutes for groups' reporting.</p>	ANK	15	

SECTION 2 – Organizing Effective Media Events – 30’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Tell participants that now you are going to look more closely into what is needed for organizing an effective media event. Introduce the criteria a good media event meets:</p> <ul style="list-style-type: none"> • <i>It’s newsworthy</i> • <i>It reinforces the campaign’s message</i> • <i>There is a clear, interesting visual for television and photographs</i> • <i>Campaign supporters are plentiful and enthusiastic</i> • <i>The candidate’s comments are concise and on message</i> • <i>The time and place are convenient for the press to attend</i> <p>And checklists of activities for planning, executing and following up on a media event. Have those checklists written on the flipchart in advance.</p> <p>1. <u>Planning the event:</u></p> <ul style="list-style-type: none"> • <i>Think through: What news are you making? What headline do you want?</i> • <i>Consider how you will tell your story visually (for example through a location, actions, people, or signs).</i> • <i>Select a location that is convenient to reporters, with parking if needed.</i> • <i>Select a time that is convenient for reporters, usually late morning or early afternoon.</i> • <i>Make sure you have permission to hold the event if it’s at a special location.</i> • <i>Prepare your media advisory and press release in the planning phase; this will help you clarify your message and ensure that the event you organize will generate the story you seek.</i> 	TP	10	<div> <p><u>Criteria for an effective media event:</u></p> <ul style="list-style-type: none"> • It’s newsworthy • It reinforces the campaign’s message • There is a clear, interesting visual for television and photographs • Campaign supporters are plentiful and enthusiastic • The candidate’s comments are concise and on message • The time and place are convenient for the press to attend </div> <div> <p><u>Planning the event:</u></p> <ul style="list-style-type: none"> • What news are you making? • What headline do you want? • How will you tell your story visually? • Pick location and time convenient to reporters • Get permission to hold the event • Prepare media advisory and press release • Select, invite, brief and confirm guest speakers • Plan needed materials and equipment </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>2. <u>Before the event:</u></p> <ul style="list-style-type: none"> • Send a media advisory to all reporters and news outlets. • Invite campaign supporters. • Secure permits if needed. • Arrange for special equipment such as sound, lighting, podium, etc. • Write out and practice the candidate's press statement. • Finalize the press release and make copies, and prepare copies of the press kit. • Confirm other speakers or special guests. • Call reporters to pitch the event and ask if they plan to attend. • Designate one person as "stage manager," responsible for working with the candidate and any other speakers at the event to ensure a smooth flow. • Hang banners, test the sound system, and do anything else you need to set up the location at least an hour before the event starts. <p>3. <u>During the event:</u></p> <ul style="list-style-type: none"> • Thank media, supporters and guests for attending. • Greet all reporters at a registration table; ask them to present credentials and sign in. • Make sure all event speakers understand the order of speakers and who the stage manager is. • Distribute press releases to reporters. • Make sure all reporters and camera operators have access to electricity and anything else they need. • Take plenty of photos during the event, from different angles and perspectives. • Post and tweet live from the event to the campaign's social media networks. 			<p><u>Before the event:</u></p> <ul style="list-style-type: none"> • Send a media advisory to all reporters and news outlets • Invite campaign supporters • Secure permits if needed • Arrange for special equipment • Write out and practice the candidate's press statement • Finalize and copy the press release and press kit • Confirm other speakers or special guests • Call reporters to pitch the event and ask if they plan to attend • Designate one person as "stage manager" • Finish location setup at least an hour before the event starts <p><u>During the event:</u></p> <ul style="list-style-type: none"> • Thank media, supporters and guests for attending • Greet all reporters at a registration table; ask them to present credentials and sign in • Make sure all event speakers know the order of speakers and who the stage manager is • Distribute press releases to reporters • Make sure all reporters and camera operators have access to electricity and anything else they need • Take plenty of photos during the event, from different angles and perspectives • Post and tweet live from the event to the campaign's social media networks

Steps	Description	Type	Min	Note to the Trainer
	<p>4. <u>After the event:</u></p> <ul style="list-style-type: none"> • Immediately send the press release and photo to all news outlets, including bloggers. • Post coverage of the event on social media networks and send it to key supporters. • Thank reporters who covered the event. 			<p><u>After the event:</u></p> <ul style="list-style-type: none"> • Immediately send the press release and photo to all news outlets, including bloggers • Post coverage of the event on social media networks and send it to key supporters • Thank reporters who covered the event
2	<p>Distribute the Worksheet Planning a Media Event and assign the following group activity: Fill in the grid on the worksheet to visualize and plan one of the media events you identified in the previous exercise.</p> <p>Allow 10 minutes for this activity. And spend 10 minutes on debrief.</p>	ANK	20	<p>There is not much time for the debrief to include full reports from all the groups and what you can do is to ask each group to report on a headline, lead, and questions and answers or likely responses.</p>

SECTION 3 – New Media Communications – 40'

Steps	Description	Type	Min	Note to the Trainer
1	<p><i>Introduce new media:</i></p> <p>New media is any newer technology that people use to consume information or interact with each other. Examples are:</p> <p>Social Networking sites → Facebook, LinkedIn</p> <p>Blogs and Micro-blogs → Twitter, Blogger, Tumblr, WordPress</p> <p>Video Hosting → YouTube, Blip.tv</p> <p>Instant Messaging → Pidgin, Skype, Whatsapp</p> <p>SMS and Text Messaging → Blackberry groups, SMS sites</p> <p>Photo and Image Sharing → Flickr, Instagram, Smilebox</p> <p>Social Bookmarking → Digg, Reddit, Pinterest</p>	TP + DBR	10	<p><u>New media:</u></p> <p>Social Networking sites → Facebook, LinkedIn</p> <p>Blogs and Micro-blogs → Twitter, Blogger, Tumblr, WordPress</p> <p>Video Hosting → YouTube, Blip.tv</p> <p>Instant Messaging → Pidgin, Skype, Whatsapp</p> <p>SMS and Text Messaging → Blackberry groups, SMS sites</p> <p>Photo and Image Sharing → Flickr, Instagram, Smilebox</p> <p>Social Bookmarking → Digg, Reddit, Pinterest</p>
	<p>Ask the participants if their party or campaign use new media in communicating with voters and what new media they use.</p>			
	<p>The next question is: What are the advantages of using new media? Record their answers on the flipchart looking for: inexpensive, exciting, where people are, fast, interactive.</p> <p>Now ask what would be disadvantages or challenges, record answers on the flipchart looking for: takes time; reaches people who are not voters, cannot control; can be a distraction from face-to-face; supporters you recruit through social networking do not go into your database, so you don't have their contact information to further build the relationship; no exact template on where to find supporters and potential supporters online; most people you reach may not be targeted voters; platforms were built for socializing, not campaigning; takes a lot of time for management and maintenance; nothing is private and mistakes have a long shelf life.</p>			

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
2	<p>Distribute the Worksheet Using New Media and ask the groups to think through the questions listed.</p> <p>Use 10 minutes for the groups' work and the rest for debrief.</p>	PEE + ANK	20	<p>Alternatively you can do this exercise individually asking each participant to fill out the questionnaire.</p> <p>If you are short on time, you could shorten this exercise by asking participants to answer the three parts of question five for the media event they planned earlier in the session. (how will you use the social media platform, what will you ask supporters to do, and draft 3 postings).</p>

SECTION 4 – Working With The Media – 29’

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask the participants to stay in their groups and to list at least 10 things a campaign or political party can do to develop and maintain a good working relationship with media in order to maximize earned media opportunities. Give 15 minutes for this activity.</p> <p>Take 15 minutes for debrief, but instead of having groups reporting have 11 guidelines written on the flipchart in advance and go one by one asking if any of the groups has it mentioned. If any of the groups have listed a guideline ask them to explain it, if not or if their explanation is partial you give an explanation.</p> <p>Here are the clarifications of each guideline:</p>			<p><u>Guidelines for working productively with the media:</u></p> <ol style="list-style-type: none"> 1. Develop relationships with key editors, reports and bloggers 2. Stay in touch 3. Understand what is newsworthy 4. Always be truthful and accurate 5. Don't be afraid to say "I'm not sure" and find out the answer 6. Understand their limits and needs 7. Respond quickly to calls 8. Provide reporters with information in a format they can use 9. Anticipate their need for content and pitch stories 10. Stay on top of the story 11. Address problems and move on
1	<ul style="list-style-type: none"> • Develop relationships with key editors, reporters, and bloggers <i>In working with the media, relationships are key. Reporters, bloggers and editors will be more likely to make the decision to cover your campaign if they know you or a member of your team, and if they are convinced that your candidacy is viable and has a real base of support. First impressions make a big impact, so make sure that when you meet with reporters the first time, you convey to them your campaign's message and the kind of support you have.</i> • Stay in touch <i>Call reporters regularly, not just to pitch stories or campaign events, but also just to stay in touch and discuss current events. Be available for calls from reporters at any time. Become a helpful resource to reporters.</i> 	PEE	29	

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> Understand what is newsworthy Certain types of stories and angles are considered newsworthy; understanding these gives you an advantage when suggesting stories to reporters or planning media events. Consider tying your campaign's story to a major national news story, an anniversary or commemorative date, broader trends in politics or campaigns, the release of a new report or data, or a human interest story. Campaign milestones, such as candidate filing, reaching a voter contact goal, or opening a headquarters also make good news stories. Always be truthful and accurate Always tell the truth. Reporters rely on their sources for accurate information. Once a source proves unreliable, they won't use that person again. Whenever possible, if you are making a point that can be backed up by independent evidence, provide that citation to the reporter so they can use it in their story. This helps your credibility and theirs, too. Don't be afraid to say "I'm not sure" and find out the answer If you get a question and are not completely sure of the answer, it's best to say "I'm not certain; let me check on that and get back to you." Make sure you research the question and call them back promptly. Reporters will appreciate your honesty. Understand their limits and needs Reporters work under tight deadlines and high pressure. Expect, and insist on, fair coverage, but don't expect reporters to go out of their way to cover your campaign. Make it easy for them to incorporate information into a story by providing research sources and suggesting other people to interview when you can. 			

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> Respond quickly to calls Most political stories are on daily deadlines, so respond as quickly as possible when a reporter calls you. If you want to have time to consider your responses, it's fine to ask the reporter what they are working on, what questions they have, and what their deadline is. Take a short time to prepare your responses, and then call them back as far advance of their deadline as possible. Provide reporters with information in a format they can use You can make a reporter's job easier by providing elements they need to put together their story. A clear, concise press release, along with the other elements in your press kit, will make their job easier. See the section on building a press kit in this module for further guidance. Anticipate their need for content and pitch stories Think about what types of stories reporters might like to work on that could include a focus on your campaign. For example, your campaign could be featured in a story about campaigns doing online outreach to voters, or in a story about efforts to register new voters in your area. Don't be shy about calling reporters you know and 'pitching' or suggesting story ideas to them. 			

Steps	Description	Type	Min	Note to the Trainer
	<ul style="list-style-type: none"> • Stay on top of the story Make yourself a good source of information for your candidate and party, as well as for reporters. Monitor news coverage from a variety of sources. Learn what types of stories different media outlets cover, and what types of stories individual reporters like to write. Stay on top of the news, not just political news, but all types of stories that could affect your country or voters. Stay on top at all times of what your campaign's message and activities are, as well as the message and activities of your opponents. • Address problems and move on If you encounter a situation where you are misquoted or a story comes out about you that is inaccurate, address the situation immediately. Call and arrange for an in-person meeting with the reporter and their editor, and insist on either a retraction or that they print a response from your campaign without edits. With online coverage (including comments posted on stories or posts), be vigilant about responding quickly to unfavorable or biased coverage with your campaign's perspective. 			

CONCLUSION – 1'

Working strategically with the media can really pay off for your campaign, allowing you to reach more voters and persuade them with your message.

Developing a strategic communications plan, organizing effective media events, using new media communication, and improving your relationship with media will help ensure that you are maximizing every opportunity to inform, inspire and motivate your supporters.

Worksheet: Planning a Media Event

Fill in the grid below to visualize and plan one media event.

Headline	Identify the news item of your story and frame it in a headline. <i>What's the headline of this story?</i>
Lead	Write a succinct paragraph in journalistic style to frame the story. What's new? Why would the news media cover this story?
Photo or Visual Image	Visualize the photo or image you want to represent the event. <i>What will people do at the media event that is visually interesting?</i>
Candidate or Party Leader Quote	Know what your sound bite is going to be and ensure everyone delivers it. <i>How do we state our message in 15 seconds or less?</i>
Supporting Facts	Provide local angles, facts and figures from objective sources. <i>What information do we have to support the claims we're making and provide interesting angles?</i>
Validator Quote	Pick speakers who reinforce your position. <i>What issue experts or constituency leaders will talk to the press for us?</i>
Question and Answers or Likely Responses	Prepare for media questions and opponents' attacks. <i>What will the reporters ask? What will our opponents say?</i>

Using New Media Worksheet

1. What new media tools are most used by your campaign's supporters?
2. What new media tools are most used by your targeted voters (the voters you need to persuade)?
3. What new media tools are most used by opinion leaders in your community?
4. Which new media tools will your campaign use? Why have you chosen these?
5. For the media event you planned earlier in this module, pick one social media platform (Facebook, Twitter, etc.), and answer the following questions:

How you will use that social media platform to help meet the goals of the event (e.g., publicize the event, get supporters to attend, communicate the event's message to supporters, etc.)?

What will you ask your supporters to do via the social networking platform (e.g., ask supporters to help with planning or set up, engage supporters in coming up with ideas for signs for the event, post photos showing community members at the event)?

Draft 3 messages regarding the event you could use on the platform:

Campaign Skills Trainer's Guide

Module 9

Campaign Planning

Setting Goals, Outlining Strategies and Defining Tasks



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 9: CAMPAIGN PLANNING

Setting Goals, Outlining Strategies and Defining Tasks

SESSION OVERVIEW:

This module provides a step-by-step guide to organizing a successful political campaign including setting goals, assessing needed resources of people, money and time, and creating a timeline, budget, and written plan.

SECTIONS:

1. Campaign Planning
 - a. Setting a Goal
 - b. Budgets and Financial Resource Management
 - c. Timeline and Time Management
 - d. Staffing and Human Resource Management
2. Data and List Management
3. Volunteer Recruitment and Management

LEARNING OBJECTIVES:

- Skills and tools for campaign planning and managing resources

TIME: 160 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- Campaign Budget Template
- Campaign Timeline Template
- Campaign Team Job Descriptions

PREPARATION:

Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. CAMPAIGN RESOURCES:
 - People
 - Money
 - Time
 - Information

4. CAMPAIGN PLAN IS A WRITTEN DOCUMENT THAT DEFINES
 - WHAT you are going to achieve
 - HOW you are going to achieve it
5. ELEMENTS OF A CAMPAIGN PLAN:
 - GOAL
 - TIMELINE AND ACTION PLAN
 - BUDGET AND FUNDRAISING
 - MESSAGE
 - MEDIA AND COMMUNICATION
 - CAMPAIGN TEAM
 - VOTER CONTACT
6. 5 STEPS FOR ORGANIZING A CAMPAIGN TEAM:
 - Identify activities
 - Identify Functions and Skills
 - Write Job Descriptions
 - Recruit
 - Assign Roles
7. SOURCES OF INFORMATION:
 - The official voter list
 - Contact lists from candidates
 - Contact lists from supporters
 - Contact lists from the party
 - Campaigns build their own
8. Volunteer is work done freely and without compensation to benefit one's community
9. Reasons to volunteer:
 - Shared belief
 - New knowledge
 - Expectations
 - Socializing
 - Recognition
10. Where are volunteers?
 - Family and friends
 - Local schools and universities
 - Local civic or religious organizations
 - Among supporters who can't give money

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises


DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

SECTION 1 – Campaign Planning: Introduction – 10'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the session and review learning objectives.</p>	TP	3	<p>A number of the elements of a campaign planning are fully developed and explained in other modules from NDI's MENA Campaign School Curriculum including: message, fundraising, media and communication and voter contact. This session will focus on the remaining elements of a campaign plan (goal, timeline and action plan, budget, and campaign team) and two other topics relevant for managing resources: Data and List Management and Volunteer Recruitment and Management.</p>
2	<p>Introduction to Campaign Planning:</p> <p>Remember, every campaign has four main resources:</p> <ul style="list-style-type: none"> - People - Money - Time - Information  <p><i>Campaign planning is about managing all of these effectively so that no matter how resource-rich or resource-poor your campaign is, you can maximize your impact and potential to win.</i></p> <p><i>A campaign plan is a written document that charts what you are going to achieve in your electoral campaign and how you are going to achieve it. It is a roadmap that will guide you and your team through the busy and challenging days of the campaign and election, help make sure you have all the resources you need and ensure you are conducting the types of activities that will get you to your goal.</i></p>	TP	7	<div> <p><u>CAMPAIGN RESOURCES:</u></p> <p>PEOPLE MONEY TIME INFORMATION</p> </div> <div> <p><u>CAMPAIGN PLAN IS A WRITTEN DOCUMENT THAT DEFINES</u></p> <ul style="list-style-type: none"> - WHAT you are going to achieve - HOW you are going to achieve it </div> <div> <p><u>ELEMENTS OF A CAMPAIGN PLAN:</u></p> <ul style="list-style-type: none"> - GOAL - TIMELINE AND ACTION PLAN - BUDGET AND FUNDRAISING - MESSAGE - MEDIA AND COMMUNICATION - CAMPAIGN TEAM - VOTER CONTACT </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>If the plan is not written down on a page somewhere, then it cannot come to life.</p> <p>If it cannot be shared with other team members, then it cannot be implemented.</p> <p>If it cannot be referred to in times of crisis, then it cannot guide your efforts.</p>			
	<p>There are many ways to construct a campaign plan, and how you do this in practice should reflect your own needs and assets, the type of election you are facing and what the election law allows. However, the following elements should be considered and included within this context, and should work together as the building blocks that get you to your goal:</p> <ul style="list-style-type: none"> Goal: Your campaign goal is a clear statement of what you want to achieve. Do you need to “top the poll,” i.e., receive more votes than any other candidate on the ballot? Do you want to increase your party’s support in the area by 5%? Are you running for better name recognition in this race, with the goal of winning a seat in the next election? Your goal should be a short, well-defined declaration of what you realistically want to accomplish. Timeline and Action Plan: The timeline and action plan outline what you are going to do on a daily basis and measure out how much time you will need to implement all your activities and the components of your campaign. Budget and Fundraising: Your budget clearly outlines how much money or other material resources you will need to implement the campaign. The fundraising component maps out how you are going to find them. Message: Your message is your statement of purpose that communicates to voters who you are, what you stand for, and what makes you different from other candidates in the race. The message elements of your plan define this statement and lay out how and when you will communicate your message. Media and Communication: This is your external communication strategy that defines how you will use conventional and newer media to communicate with voters and raise your profile. Campaign Team: How many people do you need? What will their roles be? Can you afford paid staff or will you have to recruit volunteers? How big will your team need to be? The campaign team element of your plan answers these questions so that you have the right human resources to implement your strategy effectively. Voter Contact: Your voter contact strategy calculates how many votes you will need to win or reach your goal, where you can find those votes and how you will communicate directly with supporters and potential supporters, and ensure they will cast their ballots on election day. 			

SECTION 1a – Campaign Planning: Setting a Goal – 15’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Ask the participants to give you examples of electoral campaign goals. Facilitate the discussion and write their answers on the flipchart. If needed, you can bring up the following or some other examples:</p> <ul style="list-style-type: none"> • <i>To win two more parliamentary seats in this district by picking up the largest percentage of first-time and swing voters</i> • <i>To obtain the highest number of individual votes as a candidate on my party’s list (in the open list system) in this district</i> • <i>To increase my party’s support in the area by 3%, enough to be one of the parties in government in the regional assembly</i> • <i>To get elected to the local council this year and to raise my profile enough that I will be selected as mayor within the next four years</i> <p>Wrap up this brainstorming by saying:</p> <p><i>Different campaigns might define “winning” differently. What’s important is clearly envisioning the outcome you want, and setting a specific goal to get there.</i></p>	DBR	7	<p>When you ask this question the very first impulse and response people give is: to win the election. After you write this answer on the flipchart ask about parties that hold less than 10% of seats in parliament for example and have strong support in a specific region of the country. Would their goal, realistically, be to win more than 50% of the seats. What is more likely to be their goal?</p> <p>Facilitate this brainstorm leading the discussion towards the conclusion that each contestant in the election should have a realistic goal. This goal should clearly define what it is the campaign seeks to achieve, and clarify why it is worth participating in the election.</p>
2	<p>Divide participants into groups of no more than 5 people. Provide each group with flipchart paper and a marker.</p> <p>Ask each group to define their campaign’s goal and write it down on the flipchart paper, and present it to the larger group.</p> <p>If it’s helpful, ask participants to image it’s election day. What does it look like for their campaign? What have they achieved? A goal is a statement of what you seek to achieve.</p>	ANK	8	<p>How you divide the groups will depend on who your participants are. If you have people who are working on the same campaign or for the same candidate, it makes sense to group them together so that they can easily apply the work they are doing in the training to their campaigns.</p> <p>If participants are from more diverse backgrounds, consider assigning them to campaign teams for mock candidates or a mock election. Telling them their goal is to work together to build an effective campaign plan for their team.</p>

SECTION 1b – Campaign Planning: Budgets and Financial Resource Management – 40'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain to participants that ones you have defined your goal, the next step is to figure out what resources you are going to need to have in place to achieve this goal. Make the following points:</p> <p><i>Since no campaign has as much money as it would like, a budget is a tool to help you make sound strategic decisions about what is most important and what will have the most impact.</i></p> <p><i>You need to write the budget to have a clear picture on:</i></p> <ul style="list-style-type: none"> - <i>how much resources you need in total for a campaign</i> - <i>when you need them</i> - <i>how much you have</i> - <i>how much you need to raise</i> - <i>cash flow</i> <p>Distribute the Campaign Budget Template handout and walk participants through each area, making sure the differences between income, expenses and cash flow in particular are understood.</p>	TP	10	<p>Make sure participants understand that a large part of what a campaign budget tries to track is cash flow. Campaigns need to know not only how much money and other resources they are going to need, but also when they are going to need them to guide fundraising and other resource generating efforts.</p> <p>Most campaigns need more cash at the beginning to get started and then again at the end of the campaign period to finish strong and get out their vote. Advise participants to use their budgets to track when they can expect to get income in to pay bills and when they will have to be particularly careful with spending to preserve resources.</p>
2	<p>Ask participants to return to (or remain in) their groups. Provide each group with flipchart paper and markers (these are optional for them to use; they can work off the budget template handout if they prefer.)</p> <p>Advise each team that they have a projected budget of \$12,000 for the upcoming election. As a team, they need to figure out where they are going to spend this money and when they are going to need it in order to achieve the goal they defined in the previous exercise.</p>	ANK	30	<p>Please feel free to change the amount and currency of the budget given in this assignment to match local realities.</p> <p>It may be helpful to explain that in budgeting, some costs will fall into more than one line item. For example, the costs of phones and phone cards will affect all activities including fundraising, communication and voter contact. Purchasing and formatting the voter list, or building a voter database, will impact all voter contact and GOTV expenses. Advise participants to use specific line items (such as phones or voter list) to estimate the exact cost of these expenses, and use broader categories (such as canvassing and GOTV) to estimate the additional costs of conducting these activities.</p>

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
	<p>Teams can use the Campaign Budget Template as a guide but should edit the template to remove items which will not be relevant to their campaign and to add items that they will need to pay for which are not already listed.</p> <p>Allow 20 minutes for teams to complete the activity, and 10 minutes to present their work.</p>			<p>Consider giving the groups the home task of completing the complete budget for their own campaigns. In this case, assign a specific person from each team to report back to you on a specific date and create a mechanism (such as email, Skype or a phone call) to provide each team with feedback.</p>

SECTION 1c – Campaign Planning: Timeline and Time Management – 35'

Steps	Description	Type	Min	Note to the Trainer			
1	Refer back to a campaign’s 4 main resources and point out once again that while each campaign and each candidate will have different amount of money and information, and different number of volunteers, the amount of time is the same for all contestants – it is the period from today until the Election Day. Using this time well can give a campaign a real advantage, which is why creating a timeline matters.	TP	5	You can have the campaign timeline sample on the flipchart:			
	Explain the importance and the components of a timeline:						
	<i>A detailed timeline helps you think through everything the campaign needs to complete during the official campaign and pre-campaign periods, and when it needs to be accomplished. A strong timeline will ensure that you are maximizing time as a resource and not wasting precious moments engaging in activities that don’t get you to your goal.</i>						
	<i>The best way to write a timeline is to start from the goal you defined for election day in the first section of this module and work backwards, detailing all the steps you will have to take in order to make it to this goal. A campaign’s plan will include voter contact activities, new and traditional media outreach, and fundraising tasks. Break down your larger goals in each of these areas into distinct projects, then break each project down into action steps. When you are at the action step level, plot each action on the timeline, making sure to indicate who is responsible and what resources will be needed.</i>						
	<i>The sample timeline lays out a very busy final few days for a campaign, but organizing activities in a central plan helps the campaign manager and other campaign team members make sure that everything is getting done well and on time.</i>						
2	Ask participants to return to (or remain in) their groups. Distribute the Campaign Timeline Template and provide each group with flipchart paper and markers, in case they want to use these as well.	ANK	30	Ensure participants understand the concept of this type of planning and use the debrief and discussion to advise them on any improvements they have to make, and particularly the importance of making sure the timeline is sufficiently detailed.			
	Ask the groups to use this model to work through the last week of activities for their own campaign, including all election day activities. Remind them that these activities are supposed to help get them to the goal they defined earlier in the workshop. Give 20 minutes for groups to complete their work and invite each group to briefly present their timeline.			Consider giving the groups the home task of completing the timeline for longer preparation and campaign period, such a 3 months, 6 months, or even a year. In this case, assign a specific person from each team to report back to you on a specific date and create a mechanism (such as email, Skype or a phone call) to provide each team with feedback.			

SECTION 1d – Campaign Planning: Staffing and Human Resource Management – 20'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the section:	TP	5	
	<p><i>As important as how you manage your time and material resources are the people you recruit to bring energy, ability and focus to your campaign. This is your campaign team, which can consist of both paid (staff) and unpaid (volunteers) members, depending on what you can afford and what you want to achieve.</i></p> <p><i>Every campaign team staffing starts with recruiting a campaign manager (because he or she oversees the implementation of the campaign plan, ensures that all activities run smoothly on a daily basis, and that the campaign is achieving its goals; the Campaign Manager also makes sure the candidate or candidates are holding up under the strain and demands of the campaign) and from there works out other roles depending on the party's electoral ambitions and the local political landscape.</i></p> <p><i>Rural districts, for example, often require a talented Field Organizer, dedicated Volunteer Coordinator, and numerous volunteers to reach voters in a large geographical area. Campaigns in more urban areas are more likely to use electronic and print communications to contact voters and may therefore bring in a Communications Officer first.</i></p> <p><i>Whatever your campaign team looks like, it is important that all key roles are filled, that they are filled by individuals who will take responsibility for their work, and that everyone has a clear job description and knows what his or her responsibilities are.</i></p>			
	<p>Organizing a campaign team can be done in 5 steps:</p> <ol style="list-style-type: none"> Identify activities – Review your communication plan, voter contact plan and timeline to identify all the activities you need to accomplish. Identify Functions and Skills – Identify the skills required to achieve what you have set out in your planning. Write Job Descriptions – Write job descriptions that tie skills and responsibilities to specific positions within the campaign. Recruit – Recruit staff and volunteers, based on the skills you need and the job descriptions you have written. Assign Roles – Assign specific roles to team members and volunteers. 	TP	5	<p>5 STEPS FOR ORGANIZING A CAMPAIGN TEAM:</p> <ul style="list-style-type: none"> - Identify activities - Identify Functions and Skills - Write Job Descriptions - Recruit - Assign Roles

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
2	<p>Ask participants to return to (or remain in) their groups. Distribute the Campaign Team Job Descriptions handout and provide each group with flipchart paper and markers.</p> <p>Explain that the handout is s a list of typical roles and responsibilities within a campaign team. Ask the groups to review the list and the timeline they constructed in the previous section of this module. Based on the activities they have outlined in their planning, their task is to:</p> <ol style="list-style-type: none"> 1. Select the key roles they would need to fill, and 2. To list the skills a person filling each role needs to have. <p>Allow 10 minutes for this work and 5 minutes for the debrief.</p>	ANK	15	<p>If you are doing this session along with others from this guide, and if the participants have also completed the communications and voter contact plans in previous modules, ask them to review these as well to help them identify the roles they will have to fill and the skills they will need in the members of their campaign teams.</p>

SECTION 2 – Data and List Management – 10’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce this section:</p> <p><i>Campaigns are about gaining support from people and turning them out on election day. Since reaching people is the goal of any campaign, building good lists and managing data are critical skills.</i></p> <p>Invite the participants to come up with different kinds of lists that they think would be useful in their campaign, and what they might use them for. Write their answers on the flipchart. Elicit following: lists of supporters, lists of potential donors, lists of volunteers, lists of community leaders, lists of press contacts, lists of persuadable voters, lists of opinion leaders, etc.</p> <p>Introduce the sources this information can come from:</p>	TP	5	<p>Sources of information:</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><u>SOURCES OF DATA:</u></p> <p>The official voter list Contact lists from the candidate Contact lists from supporters Contact lists from the party Campaigns build their own</p> </div>
<p>1. The official voter list <i>The official voter list should provide your campaign with the names and some form of demographic data (general age, gender, etc.) and/or contact information for every registered voter. Most campaigns try to build their core database from the official voter list, if it is reliable and if they can get it in electronic form. Even campaigns that can't get an electronic version of the list will use a hard copy to guide their voter contact efforts.</i></p> <p>2. Contact lists from the candidate <i>Every candidate for public office has a network of family, friends and professional colleagues. These are important to include in a campaign's outreach efforts because these people typically have an interest in the candidate or campaign doing well and may be able to help in a number of ways from offering public endorsements, to hosting fundraising events, to canvassing support in their local area.</i></p> <p>3. Contact lists from supporters <i>Supporters of the political party or candidate may also be able to provide lists of contacts from their personal and professional networks, which the campaign can use for fundraising, voter contact and press events. These supporters can either be individuals who provide their personal lists or organizations which provide lists of their members or professional contacts.</i></p> <p>4. Contact lists from the party <i>Party headquarters may be able to offer a list of members and supporters in the local area, as well as lists of voters who have been previously identified.</i></p>				

Steps	Description	Type	Min	Note to the Trainer
	<p>5. Campaigns build their own</p> <p><i>Some campaigns – particularly those with sufficient time and volunteers – build their own database systems from the ground up, collecting information through their voter contact efforts. Campaigns that do this typically arrange highly systematic and well-organized efforts to gather voter details, often through door-to-door canvassing.</i></p> <p><i>The ultimate objective is to come up with a system that allows you to query your data by a variety of criteria: family name, polling station, voting history, gender, donor history, etc. As such, you will need to separate your data into a variety of fields so that each can be queried separately.</i></p>			

SECTION 3 – Volunteer Recruitment and Management – 34’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Lead a quick brainstorm on the term “volunteerism.” Ask participants what it means to volunteer. Write some of their answers on the flipchart and guide the discussion towards the following answer:</p> <p>Volunteerism (or volunteering) is work done freely and without compensation to benefit one’s community</p> <p>Ask the participants why people volunteer and why they might volunteer for a political campaign. Elicit the following answers:</p> <ul style="list-style-type: none"> • <i>They believe in or are somehow connected to the issues or ideas the party or candidate represents.</i> • <i>They are motivated by a desire to learn new skills or get work experience.</i> • <i>They hope they will get a paid job from volunteering.</i> • <i>Social reasons – to meet new people, to feel more connected to the community or to do something meaningful and enjoyable.</i> • <i>They are seeking recognition and acknowledgement for their abilities.</i> <p>Then ask where they can find volunteers, and elicit following:</p> <ol style="list-style-type: none"> 1. Family and friends 2. Local schools and universities 3. Local civic or religious organizations 4. Supporters who can’t give money 	DBR + TP	10	<p>Prepare the following flipcharts in advance:</p> <div> <p>Volunteer is work done freely and without compensation to benefit one’s community</p> </div> <div> <p><u>Reasons to volunteer:</u></p> <p>Shared belief New knowledge Expectations Socializing Recognition</p> </div> <div> <p><u>Where are volunteers?</u></p> <p>Family and friends Local schools and universities Local civic or religious organizations Among supporters who can’t give money</p> </div> <p>Participants may resist the concept of volunteerism or express skepticism that this could work in their areas. If this happens, guide them back to the discussion on why people volunteer and ask whether any of these would be motivating reasons for members of their community, or what other ways they might encourage people to volunteer.</p>
	<p>The next question is: How? How can a campaign recruit as many volunteers as they need to execute a campaign? After a short brainstorming share any of the following points, if they have not already been made:</p> <p><i>Make it a regular practice for the candidate, campaign staff and volunteers to ask people if they would like to help the campaign by volunteering.</i></p> <p><i>Use the voter contact efforts and events that the campaign is organizing as opportunities to recruit volunteers as well.</i></p>			

Steps	Description	Type	Min	Note to the Trainer
	<p>Develop a small card where you can collect people's contact information, and bring those wherever you go. When you encounter someone who wants to get involved, use these to get their contact information and follow-up quickly.</p> <p>You can also use your campaign's website or Facebook page to recruit potential volunteers.</p> <p>If it is appropriate, consider developing partnerships with local academic, civic or religious institutions. They may have members who are interested in politics and may be willing to commit to a fixed-term placement in exchange for learning a specific skill or having a certain professional experience.</p> <p>Even if the campaign has one person dedicated to coordinating volunteers, every member of the campaign should use opportunities to recruit volunteers, and pass information about potential volunteers to the coordinator.</p>			
	Share with the participants the guidelines on how to manage volunteers:	TP	5	
2	<ol style="list-style-type: none"> 1. Establish standards for volunteering. Ask for a minimum commitment in terms of number of hours or days of the week a volunteer will work for the organization. Establish a work agreement based on mutual needs and expect both parties to stick to this agreement. 2. Create structures within the party or campaign to support volunteers. Ensure volunteers know to whom they are reporting and to whom they are responsible, who to go to get their next assignment and who to speak with if there is a problem. This can be done either by assigning a Volunteer Coordinator within the organization or assigning each volunteer to a specific manager. 3. Monitor progress and reassign if necessary. If a volunteer is enthusiastic but not thriving at the tasks she or he has been assigned, consider moving them to another project where they may have more interests or a better skills match. 4. Keep standards high. Don't accept subpar work simply because it came from a volunteer. Let them know your professional standards for the entire team and expect them to meet those as well. They'll benefit from learning new skills and the organization will get more from their participation. 5. Provide training and support. Ensure that you are not asking a volunteer to do something for which they have no background or training. Provide opportunities to learn new skills and to help them achieve the qualifications and experience they are seeking. 6. Show appreciation. In addition to thanking volunteers on a regular basis, there should be specific opportunities to show gratitude and publicly recognize their contribution. Take the time to get to know volunteers and find out why they have gotten involved. 7. Know what they can do. 			

Steps	Description	Type	Min	Note to the Trainer
3	<p>Ask the participants to go back to their groups and assign the following tasks:</p> <ol style="list-style-type: none"> 1. Review the campaign timeline you constructed in the previous section and calculate how many volunteers you will need to recruit for the campaign. 2. Come up with specific ideas of where your campaign might find volunteers and how you would recruit them. Think about why they should make a commitment to your campaign? <p>Give 12-13 minutes for work and the rest for debrief.</p>	ANK	19	

CONCLUSION – 1'

Once you set a goal you want to achieve with your campaign, you have to ensure you develop a plan and manage the resources you have.

Your campaign plan should include a budget that reflects the needs of your campaign, and a timeline that reflects all the activities of your campaign.

Additional resources like information and volunteers require additional efforts to be collected and recruited, but the benefits to your campaign are huge.

Campaign Budget Template

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6 (Election Day)
EXPENSES – INCOME OUT						
Office						
Phones						
Phone cards						
Supplies (paper, pens, etc.)						
Computers						
Printers						
Toner						
Internet Access						
Coffee/Tea						
Printing/Photocopying						
Flyers/Leaflets						
Paraphernalia (buttons, stickers, signs, etc.)						
Invitations						
Photocopies						
Fundraising						
Events						
Meetings						
Voter Contact						
Voter List						
Canvassing						
Community Meetings						
GOTV						
Media & Communication						
Radio Ads						
Billboards						
Website						
Press Events						

REVENUE – INCOME IN						
Contributions						
Candidates						
Political Party						
High Donors						
Medium Donors						
Low Donors						
Total Expenses						
Total Income						
Cash Flow						
Cash On-Hand						

Campaign Timeline Template

Date	Activity	Who's Responsible?	Volunteers Needed? How Many?	Other Resources? Money, Leaflets, Banners, Food, etc.
Election Day				
Official Campaign Day 15				
Official Campaign Day 14				
Official Campaign Day 13				
Official Campaign Day 12				
Official Campaign Day 11				
Official Campaign Day 10				
Official Campaign Day 9				
Official Campaign Day 8				
Official Campaign Day 7				

Official Campaign Day 6				
Official Campaign Day 5				
Official Campaign Day 4				
Official Campaign Day 3				
Official Campaign Day 2				
Official Campaign Day 1				
One Week Before Campaign				
Two Weeks Before Campaign				
Three Weeks Before Campaign				
Four Weeks Before Campaign				
Five Weeks Before Campaign				
Six Weeks Before Campaign				

Seven Weeks Before Campaign				
Eight Weeks Before Campaign				
Nine Weeks Before Campaign				
Ten Weeks Before Campaign				

Campaign Team Job Descriptions

Campaign Manager – the Campaign Manager oversees the implementation of the campaign plan, ensures that all activities run smoothly on a daily basis, and that the campaign is achieving its goals; the Campaign Manager also makes sure the candidate or candidates are holding up under the strain and demands of the campaign

Field Organizer – the Field Organizer plans, organizes and implements the party's voter outreach activities, including everything from rallies to canvassing

Communications Officer – the Communications Officer oversees all external communications and may also be responsible for media relations and the media strategy if there is not a Press Officer

Volunteer Coordinator – the Volunteer Coordinator recruits and manages all volunteers, as well as makes sure they have all the information they need to do a good job and feel like they are part of the team

Fundraiser – the Fundraiser raises financial and other material resources for the campaign (such as donated office supplies, food, computer equipment, office space, etc.) within the limits of campaign and political finance and spending regulations

Press Officer – the Press Officer writes the media strategy for the campaign (often in collaboration with the Campaign Manager and the party's central press office), handles all media relations, organizes press events and builds relationships with journalists to help boost the party's local press coverage

Researcher – Researchers help collect information that the party will use in its campaign materials and strategies, such as information on policy issues or data on priorities among the voters

Technology Officer – the Technology Officers ensures that the campaign has access to whatever forms of technology is needed to implement the campaign plan, including mobile phones, computers, internet access, database software, etc.

New Media Officer – the New Media Officer handles outreach to newer forms of media, such as Twitter, Facebook, internet video messages, etc., as well as managing various forms of electronic communication, such as SMS, emails, designated websites, etc.

Office Manager – the Office Manager runs the campaign office, including answering phones, setting up meetings, ensuring there are adequate supplies, updating calendars, etc.

Database Manager – the Database Manager sets up and maintains the campaign's voter list, including regularly inputting the results of voter contact activities, working with the field organizer to target likely supporters, and pulling lists of targeted voters for campaign volunteers to contact.

Campaign Skills Trainer's Guide

Module 10

Mobilizing Resources

Support, Donations, Volunteers



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 10: MOBILIZING RESOURCES

Support, Donations, Volunteers

SESSION OVERVIEW:

All campaigns need resources, and successful candidates are able to mobilize many types of assistance, including donations, in-kind contributions, volunteers, and supporters. This module explores the skills and techniques involved in resource recruitment and management.

In this module, participants identify the types of resources needed to run a campaign--money, in-kind contributions, supporters and volunteers--and learn techniques for identifying and assessing potential sources of support. Special focus will be put on identifying potential supporters and fundraising techniques, and practicing how to directly ask for financial and other forms of support.

NB: *In advance of the training, inform participants that they should bring along their personal contact or address books and any contact lists they have access to from their parties or campaigns. They will use these to build a list of potential donors.*

SECTIONS:

1. Rules for Political Fundraising
2. The Spectrum of Support
3. Identifying Potential Donors
4. Fundraising Tools and Techniques
5. Resources vs. Return
6. The Art of the Ask

LEARNING OBJECTIVES:

- Identifying the types of resources needed
- Identifying and assessing potential sources of support
- Identifying different fundraising techniques
- Practicing how to ask for things in person

TIME: 110 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Paper and pens or pencils for participants (or advise them in advance to bring their own)
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- None

PREPARATION:

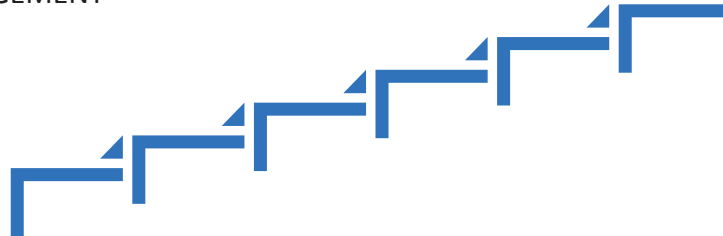
Write on the flipchart in advance:

1. Agenda (optional – if it is not copied)
2. Learning Objectives

3. MYTHS OF POLITICAL FUNDRAISING:

- Only people with a lot of money donate to political parties.
- If I ask someone for money, I will make them angry.
- Fundraising is only about money.
- It doesn't matter what the law says; no one will ever find out.
- Fundraising is begging or shameful.
- We don't need to go out and find donors; they will find us!

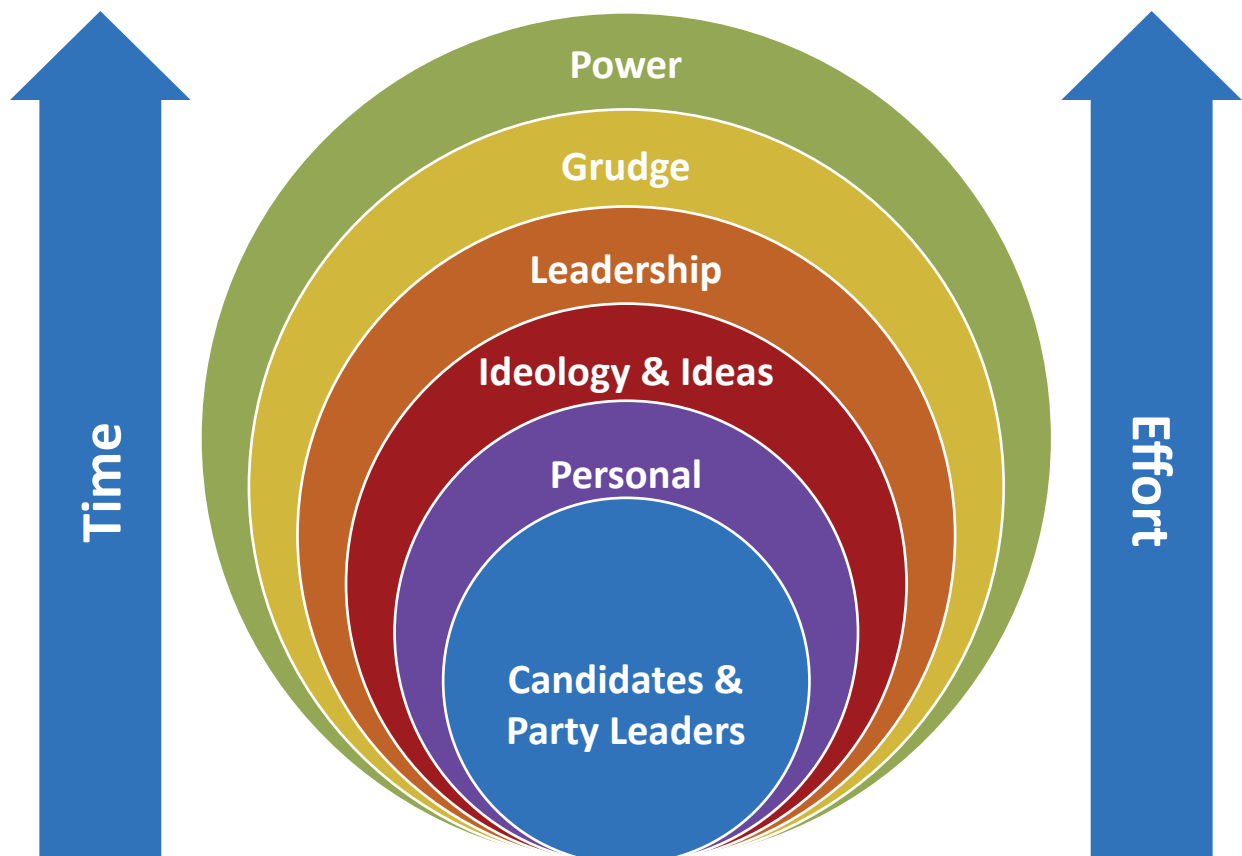
4. LADDER OF ENGAGEMENT



5. QUESTIONS FOR CANDIDATES AND PARTY OFFICIALS:

- Who knows you? Who likes you?
- What issues have you championed? Who else thinks these issues are important?
- What are your professional achievements that interest or impact others?
- What are your personal achievements that interest or impact others?
- Who are your political allies?
- What organizations do you belong to?
- What community leaders support your work?
- What family ties will help fundraising?

6. CIRCLES OF BENEFIT:



7. FUNDRAISING TECHNIQUES ASSESSEMENT:

High Resources / High Return	Low Resources / High Return
Low Resources / Low Return	High Resources / Low Return

8. THE ART OF THE ASK:

1. Prepare
2. Establish Rapport
3. Connect
4. Be Specific
5. Stop Talking
6. Listen and Respond

If the donor says:

Yes →

Maybe →

No →

Yes, but less →

7. Take Care of Details
8. Show Appreciation
9. Ask Again
10. Stay in touch

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

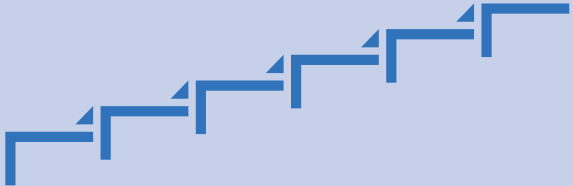
SECTION 1 – Rules for Political Fundraising – 10'


Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review the learning objectives.	TP	1	
2	<p>As a warm-up, begin the session by asking the participants if they have ever raised money or got any other resources donated for their party. Ask those who have to tell you what they have learned from that experience. (If no one has done this, ask participants what their impressions are of political fundraising.)</p> <p>Then say that there are several common misunderstandings about how political fundraising works and share with them the following list:</p> <ul style="list-style-type: none"> • Only people with a lot of money donate to political parties. • If I ask someone for money, I will make them angry. • Fundraising is only about money. • It doesn't matter what the law says; no one will ever find out. • Fundraising is begging or shameful. • We don't need to go out and find donors; they will find us! <p>Confront each of listed myths with truths, but before you reveal these, ask the participants if they can explain why each myth is not true. Try to elicit as much as possible from the following:</p> <p><u>Only people with a lot of money donate to political parties:</u></p> <ul style="list-style-type: none"> • It is not just the wealthy who are willing to be political donors. • In many countries, the people who earn the least amount of money give the largest percentage of their income away. • It is possible to raise large sums of money in small amounts. 	DBR	9	<p>This brainstorming serves as an assessment tool. It is highly that most participants will have done some form of resource raising – getting food donated, recruiting volunteers, finding someone to pay for mobile phone cards, and other similar things – but they may not realize that what they did was resource raising or fundraising.</p> <p>If participants seem particularly uncomfortable with the idea of fundraising or asking for money, feel free to take a minute before the “Myths” exercise to explore this and ask them to explain why they feel this way. A number of the issues addressed in the “Myths” exercise may come out, which will create a useful segue.</p> <p>Prepare the following on the flipchart in advance:</p> <div> <p><u>Myths of political fundraising:</u></p> <ul style="list-style-type: none"> • Only people with a lot of money donate to political parties. • If I ask someone for money, I will make them angry. • Fundraising is only about money. • It doesn't matter what the law says; no one will ever find out. • Fundraising is begging or shameful. • We don't need to go out and find donors; they will find us! </div>

Steps	Description	Type	Min	Note to the Trainer
	<p><u>If I ask someone for money, I will make them angry:</u></p> <p>Sometimes, we are concerned that we will insult someone if we ask them to contribute to our political party or campaign, or we think we will have to offer them something in return for their contribution. The truth is that when you are asking someone to contribute to your party, you are asking them to take leadership and to support your party's or campaign's vision for the country and the future. People are often honored to be asked to play such a role.</p> <p><u>Fundraising is only about money:</u></p> <ul style="list-style-type: none"> • Money is important, but it's not everything. <p>If a supporter is not able to give money, they might be able to provide office space, office supplies, computers, printing, air conditioning, internet access, transportation, bathroom supplies, food and refreshments, etc., or to host an event for the party or candidates.</p> <p><u>It doesn't matter what the law says; no one will ever find out:</u></p> <ul style="list-style-type: none"> • Voters are skeptical about the relationship between money and politics and, frankly, they should be. • Everything that you do as a political fundraiser must be legal, moral and ethical. • Know the law: who can give, how much, when and what has to be publicly declared. If the law does not exist or is unclear, set your own standards, make them honorable and stick by them. • Always ask yourself: how would I feel if this appeared in the newspaper (or if my mother found out)? 			

Steps	Description	Type	Min	Note to the Trainer
	<p><u>Fundraising is begging or shameful:</u></p> <ul style="list-style-type: none"> • Political fundraising is not begging and should not be considered shameful or embarrassing. • Political fundraising is a form of specialized marketing, connecting the vision of the party to individuals who want to see that vision become a reality. • Raising money for politics is about getting people involved in political events that affect all of society. Asking people to become more invested in their country's political future should be perceived as an honorable request rather than an embarrassing or awkward one. <p><u>We don't need to go out and find donors; they will find us!</u></p> <ul style="list-style-type: none"> • Money rarely finds its way to your campaign all by itself. • This type of specialized marketing requires research and outreach to identify and communicate directly with prospective donors. • The only way to raise money is to ask for it! 			

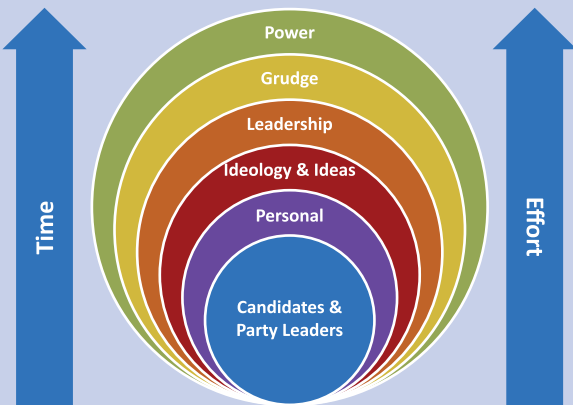
SECTION 2 – The Spectrum of Support – 7'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Revisit the point you have just made that fundraising (and resource raising) is not just about money. Reaching out to supporters and potential supporters is about getting people involved in the political process. There are many ways that people can support your campaign.</p> <p>Ask the participants to think of all the different ways that supporters can engage with or get involved with their political party or campaign. Some of these may involve contributing money, but others may involve giving time or helping the party expand its support.</p> <p>Write participants' ideas on the flipchart, trying to elicit at least 5 but no more than 8 suggestions. Some options to help with the brainstorm are listed below. Ensure that there is diversity among the suggestions in terms of the level of commitment to the campaign they require, and that "making a financial contribution" is one of the items.</p> <ul style="list-style-type: none"> - Attending an event - Talking to family and friends about the campaign - Helping at the campaign office - Canvassing - Hosting an event - Making a financial contribution <p>Once you have completed the list, ask the participants to put these activities in order from lowest to highest, in terms of the level of engagement with the campaign or party they require. In other words, the activities at the bottom rungs of the ladder require less time and commitment from the supporter. As you move up the ladder, the level of commitment from the supporter increases.</p>	DBR	5	<p>As the participants are organizing steps, you can draw a blank Ladder of Engagement (the number of steps should match the number of activities listed in the brainstorming) to which you will add their conclusions:</p> <p><u>LADDER OF ENGAGEMENT:</u></p>  <p>The final ladder of engagement, completed with the participants' suggestions, might look something like the one below. The activities moving from the lower rungs to the higher rungs of the ladder should become more progressively involved, committed and engaged with the party or campaign.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask a participant to come up and facilitate the discussion among the larger group while you prepare the ladder of engagement on another piece of flipchart paper. Once they have reached consensus, add their answers to the picture, ensuring that the highest one is “making a financial contribution”.</p> <p>Conclude with: <i>Building support can start with something that seems very small or simple – often it is simply attending an event for the party or the candidate – and then grows into something bigger. This is how many political party and campaign activists begin and expand their commitment to politics.</i></p>	TP	5	<p>If participants are unable to reach consensus during the discussion on the level of engagement and commitment among the activities, feel free to intervene to provide direction.</p> 
2	<p>Ask participants: <i>Why do people give support to political parties, campaigns and candidates? Why do people do things like the activities we have listed on the ladder of engagement?</i></p> <p>Accept all the reasons offered by the participants, and then explain that all of these can be summarized by the following two:</p> <ol style="list-style-type: none"> 1. People give support because they want to 2. People give support because someone asked them to <p>Make a strong point here that: <i>The job of the campaign team is to identify people who support, or will vote for, the candidate or party—and then to move those people up the ladder of engagement, increasing their level of support and commitment so that the campaign has the volunteer, material and financial resources it needs and the supports have the opportunity to engage more fully in political life.</i></p>	DBR	2	<p>It is unlikely that participants will give the answer, “because someone asked them to” during this brainstorm, but this is an important point to make. Tie this back to the points you made during the “Myths of Fundraising” discussion about fundraising as a way of asking people to take leadership, and about how money never walks in the door on its own; you have to go out and ask for it.</p>

SECTION 3 – Identifying Potential Donors – 41’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce this section by saying:</p> <p><i>Now that we clarified what fundraising and resource-raising are all about, it is time to think about who the people might be who we can ask for these things.</i></p> <p><i>Finding potential donors starts with identifying individuals and organizations with whom the party or its candidates have shared values, ideals, visions or attitudes. It is surprisingly easy to do this, and it all starts with brainstorming – amassing information by thinking through some of the questions and clues as to who donors might be.</i></p> <p><i>The best place to start is by interviewing the party’s candidates and senior officials, as they are likely to have the highest profiles and the strongest personal and professional networks, by asking them some of the following questions:</i></p> <ul style="list-style-type: none"> • <i>Who knows you? Who likes you?</i> • <i>What issues have you championed?</i> • <i>Who else thinks these issues are important?</i> • <i>What are your professional achievements that interest or impact others?</i> • <i>What are your personal achievements that interest or impact others?</i> • <i>Who are your political allies?</i> • <i>What organizations do you belong to?</i> • <i>What community leaders support your work?</i> • <i>What family ties will help fundraising?</i> 	DBR	5	<p>Prepare the following flipcharts in advance:</p> <div> <p><u>QUESTIONS FOR CANDIDATES AND PARTY OFFICIALS:</u></p> <ul style="list-style-type: none"> • Who knows you? Who likes you? • What issues have you championed? • Who else thinks these issues are important? • What are your professional achievements that interest or impact others? • What are your personal achievements that interest or impact others? • Who are your political allies? • What organizations do you belong to? • What community leaders support your work? • What family ties will help fundraising? </div>

Steps	Description	Type	Min	Note to the Trainer
	<p>Another brainstorming tool is a diagram called the Circles of Benefit. This figure illustrates the six major categories of political donors. It can be used to help candidates, party officials and political fundraisers think about what types of people in their personal or professional network might be potential donors.</p> <p>Reveal the diagram you have written on the flipchart in advance and explain each category:</p> <p>Candidates and Party Leaders:</p> <ul style="list-style-type: none"> • Candidates and party leaders should make a personal financial contribution to their campaign or party, respectively. • It is difficult to make the case that other people should give if they are not doing so themselves. <p>Personal</p> <ul style="list-style-type: none"> • Candidates and party leaders should look at their personal connections, including family members, friends, and close professional colleagues, to identify potential donors. • Because of their personal relationship with the party leader or candidate, these people want to see the candidate succeed. • Fundraising Message: "This is important to me." <p>Ideology and Ideas</p> <ul style="list-style-type: none"> • Donors in this category are those who share the same causes or who advocate for the same ideas as your party or candidates. • People who share the same heritage, background or community group may also fall into this category. • Fundraising Message: "We share the same values and vision." 			 <p>The diagram consists of six concentric circles. From the outermost to the innermost, the circles are labeled: Power (green), Grudge (yellow-green), Leadership (yellow), Ideology & Ideas (orange), Personal (red), and Candidates & Party Leaders (blue). To the left of the circles is a vertical blue arrow pointing upwards, labeled 'Time'. To the right of the circles is a vertical blue arrow pointing upwards, labeled 'Effort'.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Leadership</p> <ul style="list-style-type: none"> Local community leaders, even those who are largely non-political, will often take a stand for you if they feel you will do a good job representing the needs of the community. Think about local leaders in the civic, academic, religious or business communities who may want to support good political leadership for the area as well. Fundraising Message: “We want the same things for this community.” <p>Grudge</p> <ul style="list-style-type: none"> Some donors may not like your party or your candidate very much. But, they dislike the party or the candidate that you are challenging even more and they want to ensure that you are in a position of strength to defeat your opponent. Fundraising Message: “We are strong; we can challenge them.” <p>Power</p> <ul style="list-style-type: none"> There are many donors who like to have a relationship with whoever is going to be in power, largely to protect their own interests. Connect their interests with the public commitments you are making as a campaign or party. People or organizations in this circle generally give late in an electoral campaign, because they want to see who is likely to win. Fundraising Message: “We are going to win and we understand your issues.” <p>As the arrows on the side of the diagram illustrate, as you move from the core to the outside of the circle it takes more time and more effort to cultivate a relationship with each type of donor.</p>			

Steps	Description	Type	Min	Note to the Trainer
2	<p>Ask participants if they have any questions about the diagram or any of the categories of potential donors. Clarify any questions or misunderstanding.</p> <p>Instruct participants to take out a piece of paper and something to write with. Ask participants to review the categories of potential donors from the diagram and, thinking about their party or candidates, name at least one new potential donor for each of the categories. Allow 5 minutes for this exercise.</p> <p>When participants are finished, ask if anyone would like to share their list of potential donors. (NB: This is not essential, especially in a multi-party environment. However, in a single-party environment it can be a helpful way for participants to start thinking about who potential donors are.)</p>	ANK	7	<p>Debriefing exercises during a fundraising training can sometimes be tricky if participants feel that information pertaining to donors is sensitive or confidential. This tends to be in a multi-party setting in particular.</p> <p>However, don't avoid asking participants if they want to share their ideas about potential donors. What you may find is that this can lead to a very good discussion about who could possibly contribute to the party or campaign and, in some cases, the participants may end up working together to build a finance plan jointly.</p>
3	<p>Tell the participants that we are going to build on their initial ideas for donors and start thinking about how to expand this list.</p> <p>Explain to participants that finding potential donors often starts with doing exactly what they have just done – building a list.</p> <p>Where do the names on these lists come from? In reality, they can come from any source – any individual or organization that might be sympathetic to the party or the candidate. Common sources include:</p> <ul style="list-style-type: none"> • <i>Current and past schedules, diaries or day planners</i> • <i>Mobile phone contact lists</i> • <i>Membership lists from professional organizations</i> • <i>Employee or staff lists from work</i> • <i>Rolodex or address books</i> • <i>Club memberships</i> • <i>Email lists</i> • <i>Names of family members</i> 	PEE + TP	7	<p>In advance of the training, inform participants that they should bring along their personal contact or address books and any contact lists they have access to from their parties or campaigns. These will be used in this segment of the training.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>These different types of lists can come from party candidates, senior officials, current party supporters, and other party activists. The purpose is to review these lists and identify anyone on them who might be a potential supporter.</p> <p>Ask participants if they can think of any other sources of contact information for potential donors.</p>			
4	<p>Ask the participants to take out the personal contact or address books and any contact lists they have brought with them. If they have not brought these things, ask them to open the contact lists on their mobile phones (or computers, if they brought one).</p> <p>Inform participants that their task is to identify 5-10 people on these lists who they think would consider making a contribution to their party or campaign, and add these to the list they have already come up with from the Circles of Benefit exercise.</p> <p>For each person they come up with, they should write down their:</p> <ul style="list-style-type: none"> - Name and contact information (What's the best way to reach them? Phone? SMS? Email? At home? At the office?) - Their relationship to the party or candidate <p>Allow 5 minutes for this activity. As with the previous exercise, feedback and debrief are optional depending on how sensitive this information is.</p> <p>When participants have completed this exercise, make the following point:</p> <p><i>Once you have a central list of potential donors, the next questions are:</i></p> <ul style="list-style-type: none"> - What (or how much) should you ask each person to contribute? - How is the best way to ask them? 	TP	3	

Steps	Description	Type	Min	Note to the Trainer
5	<p>Explain to participants that you will first look at how to figure out what or how much to ask potential donors to contribute.</p> <p><i>Donors typically fall into three general categories, based on the general amount you feel you can ask from them:</i></p> <p>Low donors <i>These are donors you can ask for a small amount of money or material resources.</i></p> <p>Medium donors <i>These are donors you can ask for a moderate amount of money or material resources.</i></p> <p>High donors <i>These are donors you can ask for a large amount of money or material resources.</i></p> <p><i>The amount of money you can ask for from each category of donors will depend on the local economic situation, what earnings are like and whether or not there is already a culture of political giving, which can take time to develop. Consider each of these factors and assign a specific figure to each category of donors, or a specific amount that you are going to ask each individual on your list to contribute.</i></p>	TP	4	
6	<p>Ask participants to go back to their list of potential donors and, by each one's name, indicate their likely level of giving. They can do this by either assigning a specific amount of money they think they are likely to give, or characterize each as low, medium or high.</p>	ANK	10	<p>If there is sufficient time, facilitate a discussion among participants of what range of money constitutes a low, medium and high donation. These may differ according to the perspective of the participants and their party, but it is helpful to define these.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Allow 7 minutes for this exercise and 3 minutes for the debrief. During the debrief, even if participants don't want to share names or the financial amounts they have assigned to each potential donor, ask them to report back how many low, medium and high donors appear on their list. It can also be helpful to ask them to specify a financial range for what constitutes a low, medium or high donation.</p> <p>After this exercise, advise participants that this is something they can do in their own political parties or campaigns: <i>To build a larger list or even a database of potential donors, organize a brainstorming meeting or planning session with party leaders, senior officials, candidates and even prominent party supporters. Ask them all to come to the meeting with their personal and professional contact lists and any other relevant data files, and walk them through the same brainstorming process as you have conducted in this workshop.</i></p> <p>Advise participants that when putting together a database of potential donors, it is important to compile all of this information as clearly and comprehensively as possible. Get the spelling of names correct; identify the right way to address people and the best way to contact each person on the list.</p>			

SECTION 4 – Fundraising Tools and Techniques – 15'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Explain that you will now look at how you actually go about asking donors to contribute. Define “Fundraising Tools and Techniques” by offering the following: <i>Fundraising tools and techniques are the activities, methods and means that political parties and candidates use to raise money or ask for other forms of support.</i></p> <p>Ask the participants to give you examples of fundraising techniques that they are aware of or which they may have used in the past. Write these on the flipchart.</p> <p>Add any from the list below which were not mentioned during the discussion, and briefly explain what they are:</p> <p><i>Common fundraising techniques include:</i></p> <p>Auctions – At auctions, organizers get a number of nice items donated, such as pieces of art, clothing, dinner at a nice restaurant, hotel stays, etc., and invite potential donors to bid on these items at a reception or dinner.</p> <p>Raffles or tombola – For a raffle or tombola, get items of any value donated to the party or campaign and sell tickets to as many people as possible. Draw tickets to determine who wins the prizes. This can be done as part of another event or as a stand-alone fundraiser.</p> <p>Membership dues and fees – Collect fees from party members at regular intervals (e.g., monthly, quarterly, annually). Offer different levels of membership depending on income and ability to pay. If your party is going to charge membership fees, it must collect these on a regular basis.</p>	DBR + TP	10	<p>Since the concept of fundraising for political parties is fairly new in many countries, participants may be skeptical that some of these methods could work in their local environments. If this is the case, encourage participants to think more broadly and creatively and advise them that all of these methods can be modified to suit local norms.</p> <p>Clearly fundraising techniques which go against legal or cultural standards should be avoided. For example, don't organize a lottery if gambling is unacceptable or illegal. But there are simple ways to adapt each of these techniques to accommodate what will be more acceptable and appealing locally.</p>

Steps	Description	Type	Min	Note to the Trainer
	<p>Grassroots fundraising – Grassroots fundraising is when you raise large to moderate sums of money in small amounts. This can include selling campaign or party merchandise such as shirts, bags, posters and buttons; selling food at a community event; or organizing a coffee or tea gathering. The internet is now being actively used in many countries (where the necessary infrastructure exists) as a highly successful medium for grassroots fundraising.</p> <p>Coffees or house parties – Coffees or house parties are informal events in which party members or supporters host small gatherings of their friends, family, neighbors and/or colleagues either at their home or another comfortable venue. The host uses the event to introduce a candidate or party to their guests.</p> <p>Potluck dinner or picnic – At a potluck event, the campaign or candidate sells tickets to raise money and everyone attending brings a dish or something to eat so that the costs of the food are covered.</p> <p>Awards event – Awards events are typically more expensive gatherings in which the party sells tickets or tables of tickets to high donors. The party uses the event to deliver an award or to acknowledge some member of the community whose work or values matches the party's vision.</p> <p>Concert or dance – Concerts, dances or any form of social event can be fun ways to raise moderate amounts of money and reach out to new or young donors.</p> <p>Community festival – Some political parties host community festivals to mark a special occasion or anniversary and make money by renting out booths or tables to businesses and organizations, selling food and merchandise, recruiting new members and perhaps including other forms of fundraising such as a raffle.</p>			

Steps	Description	Type	Min	Note to the Trainer
	<p>Personal solicitation – Personal solicitation is simply asking someone for money in a face-to-face meeting.</p> <p>Re-solicitation – Re-solicitation is asking someone who has given money to the party or to a candidate in the past to give again.</p> <p>Call time/Phones – Many candidates and party leaders set aside a specific amount of time every week to make phone calls to prospective donors to ask for contributions. This time can also be used to build relationships with individuals who may contribute over time, but not at the first point of contact.</p> <p>Letters – In countries with reliable postal and banking systems, candidates or parties can send out letters either requesting donations or inviting prospective donors to attend a fundraising event.</p> <p>Email and the Internet – Email and the internet are being used more and more as a successful form of grassroots fundraising in countries where the necessary infrastructure exists to support online donations.</p> <p>Finance Committee – Finance committees are made up of individuals who commit to both donating and raising a specific amount of money each year for the party or specific candidates. Committee members are typically well-connected or high-profile supporters who receive special recognition for their work.</p> <p>Conferences and Forums – Many parties organize conferences or forums of speakers in which prominent party officials and supporters speak on issues of public interest. There can be a ticket price or registration fee for these events, and parties can add additional fundraising events onto the conference, such as a networking coffee, higher-priced dinner or a raffle.</p>			

Steps	Description	Type	Min	Note to the Trainer
	Selling Advertisements - Some parties sell ads on promotional items such as an annual calendar. The calendar, for example, gives the party the opportunity to sell at least 12 advertisements. Selling ads is a way of offering donors something tangible in return for their support.			
2	Ask the participants to go back to their lists of potential donors again, and to select the fundraising technique which would be the most suitable for each individual on their list. Give 3 minutes for this activity.	ANK	5	As an alternative exercise, you can ask the participants to select 2 or 3 fundraising techniques which they think could be implemented in their communities and have a brief discussion on how they would implemented.

SECTION 5 – Resources vs. Return – 15'

Steps	Description	Type	Min	Note to the Trainer																						
1	<p>Remind participants that in a campaign or political environment, you will rarely have all the resources you need to do everything you want to do. <i>Even in fundraising, you have to think strategically about the amount of resources you will have to use to get the return (or the results) that you want and need.</i></p> <p>Instruct the participants to review the comprehensive list of fundraising techniques you made in the previous segment. Ask them, based on their own experience and opinions, which would require the most work (resources) and which would generate the most money (return). Lead a short discussion.</p>	DBR + TP	15	<p>Prepare the following on the flipchart in advance:</p> <table><tr><th>High Resources / High Return</th><th>Low Resources / High Return</th></tr><tr><td></td><td></td></tr><tr><th>Low Resources / Low Return</th><th>High Resources / Low Return</th></tr><tr><td></td><td></td></tr></table>	High Resources / High Return	Low Resources / High Return			Low Resources / Low Return	High Resources / Low Return																
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	<p>Introduce the Resources vs. Return chart and ask the participants to place all the listed techniques in one of the quadrants, based on the resources they will require to put together compared to what the party or campaign will gain in return. Facilitate this discussion using the completed Resources vs. Return chart in the Note to the Trainer column.</p> <p>Debrief the discussion by pointing out that: <i>Just because you can put on a massive concert with the greatest pop stars in the country and lots of flashy stage lights and a giant sound system does not mean you should.</i></p> <p><i>Fundraising is about exactly that – raising funds. If an event that you are planning is going to take a lot of work and probably not make a whole lot of money, should you actually do it?</i></p> <p><i>This is an important question. All good political fundraisers need to continually compare the resources that each fundraising effort requires (e.g., the time, people, money, etc.) to the return that it will generate (e.g., the actual money or net income coming to the party).</i></p>			<p>Completed Resources vs. Return chart</p> <table><tr><th>High Resources / High Return</th><th>Low Resources / High Return</th></tr><tr><td>Auction</td><td>Personal solicitation</td></tr><tr><td>Awards dinner</td><td>Re-solicitation</td></tr><tr><td>Membership: monthly direct fees or high dues</td><td>Hosted event (all costs covered by hosts)</td></tr><tr><td>Higher-priced events</td><td>Call time</td></tr><tr><td>Finance committee</td><td>Email and internet (situational)</td></tr><tr><th>Low Resources / Low Return</th><th>High Resources / Low Return</th></tr><tr><td>Coffees or House Parties</td><td>Potluck dinner</td></tr><tr><td>Letters</td><td>Concert or dance</td></tr><tr><td></td><td>Membership with small dues</td></tr><tr><td></td><td>Merchandise – shirts, bags, buttons, books, etc.</td></tr></table>	High Resources / High Return	Low Resources / High Return	Auction	Personal solicitation	Awards dinner	Re-solicitation	Membership: monthly direct fees or high dues	Hosted event (all costs covered by hosts)	Higher-priced events	Call time	Finance committee	Email and internet (situational)	Low Resources / Low Return	High Resources / Low Return	Coffees or House Parties	Potluck dinner	Letters	Concert or dance		Membership with small dues		Merchandise – shirts, bags, buttons, books, etc.
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SECTION 6 – The Art of The Ask – 20’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the section and explain the process:</p> <p><i>Being able to ask for things is a negotiation skill. In politics, asking for support – whether it is financial, material or political – is an important proficiency to develop. Remember that engaging supporters can start with something very small, and then grow into larger commitments. Being able to ask a supporter to take that slight step up from voter to volunteer is just as important as being able to ask a major donor for large amounts of money.</i></p> <p><i>When it comes to asking for things, your specific approach will depend on the nature of your relationship with the person you are asking and the types of language and communication styles with which you are comfortable. However, the process generally requires the following steps:</i></p> <p>1. Prepare. Know in advance how much you are going to ask and think through why this individual would be motivated to support the party or campaign. In order to explore where there might be personal connections with the candidate, gather as much information as possible on the person’s professional background and connections, family relationships, schooling, and interests. If you are asking for financial support, consider what ring of the fundraising diagram this person might be on.</p> <p>2. Establish Rapport. Use language, gestures and an appropriate setting to make a connection so that both you and the person with whom you are meeting feel at ease. Make it clear from your body language and approach that this is a two-way communication; you are not just going to blurt out the request for money or other forms of support.</p>	TP	10	<p><u>THE ART OF THE ASK:</u></p> <ol style="list-style-type: none"> 1. Prepare 2. Establish Rapport 3. Connect 4. Be Specific 5. Stop Talking 6. Listen and Respond <p><u>If the donor says:</u> Yes → Maybe → No → Yes, but less →</p> <ol style="list-style-type: none"> 7. Take Care of Details 8. Show Appreciation 9. Ask Again 10. Stay in touch

Steps	Description	Type	Min	Note to the Trainer										
	<p>3. Connect. Clearly connect what is important to the donor with what you are trying to achieve as a party or a candidate, and explain how you can make a difference. Keep your message compelling but concise; do not talk for too long.</p> <p>4. Be Specific. Ask for something specific. If you are asking for money, tell the potential donor exactly how much you would like them to contribute. It is not sufficient to ask for “something” or “anything.” This is a negotiation – you have to give them something to work with.</p> <p>5. Stop Talking. Once you’ve asked for something specific, stop talking and wait for the supporter or donor to consider the request and listen for the response. Do not worry if there is a moment or two of silence; that is perfectly normal. If you try to fill the silence with words, you may find you are talking yourself down from what you have just asked for and undermining your own ask. If it is difficult to be quiet, reach for your glass of water or tea and take a long sip!</p> <p>6. Listen and Respond. There are four potential answers from the donor or supporter and four potential replies from you.</p> <table><tr><td><u>If the donor says:</u></td><td><u>You say:</u></td></tr><tr><td>Yes →</td><td>Great! Thank you!</td></tr><tr><td>Maybe →</td><td>Do you need more information?</td></tr><tr><td>No →</td><td>Is there another amount you would be comfortable giving? Or, is there another way of supporting the party that you would feel more comfortable with?</td></tr><tr><td>Yes, but less →</td><td>Would a contribution of (slightly lower figure) be more appropriate?</td></tr></table>	<u>If the donor says:</u>	<u>You say:</u>	Yes →	Great! Thank you!	Maybe →	Do you need more information?	No →	Is there another amount you would be comfortable giving? Or, is there another way of supporting the party that you would feel more comfortable with?	Yes, but less →	Would a contribution of (slightly lower figure) be more appropriate?			
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Steps	Description	Type	Min	Note to the Trainer
	<p>7. Take Care of Details. If the person has made a financial commitment, make arrangements to collect it including where and when. If they need to consider the proposal further, determine how you will get them the information they need and make a date for a follow-up meeting. If the supporter has agreed to get more involved in the campaign, make arrangements for when and how this can happen.</p> <p>8. Show Appreciation. Regardless of the response, make sure you thank them for their time and consideration. Be sure to send a formal and appropriate thank you to all supporters, no matter what they have contributed.</p> <p>9. Ask Again. Once you have shown appreciation for your donors, do not be afraid to ask them for an additional contribution. Donors who have already invested are highly likely to contribute again. If a supporter has agreed to volunteer at campaign headquarters or to canvass, ask if they would be interested in getting more involved by hosting an event for the campaign for example.</p> <p>10. Stay in touch. Keep good relations with donors, potential donors and supporters who are making a real contribution to the campaign. Do not call only when you want to ask for something, but also during special occasions, holidays or to communicate about significant political events or happenings within the political party.</p>			

Steps	Description	Type	Min	Note to the Trainer
2	<p>Ask for two volunteers to come up to the front and give them the role of either a candidate (who is asking for a contribution) or a potential donor.</p> <p>The participant who is the potential donor takes on the character of one of the people he or she has listed in the exercise done in section 3 and tells the group a bit about this person, including their relationship with the candidate.</p> <p>The participant who is the candidate can take a minute or two to prepare, including thinking about what or how much to ask for, and can ask for details or any other information they need.</p> <p>Give them a 2 minute limit and a scenario (are they meeting in a café, an office, an event, for example). Then, they play out their roles with the candidate asking for a contribution.</p> <p>Offer feedback, both from the trainer and the group, and give the participants the opportunity to comment on how it felt to ask for money, and how it felt to be asked.</p> <p>Repeat the same role play with one or two more pairs, based on time available.</p>	ANK	10	

CONCLUSION – 2'

Fundraising is an important, long-term strategic function for all political parties and campaigns. It requires time, skills, planning, commitment and an understanding of the process.

What is most important to keep in mind is that fundraising is a way of asking supporter to take leadership; that it is not only about money but about finding ways for supporters to become more engaged in the political process; and, that at its core, fundraising is simply another means for parties to reach out to and connect with voters.

Campaign Skills Trainer's Guide

Module 11

Getting on a List

Setting Personal Political Goals



CAMPAIGN SKILLS TRAINER'S GUIDE

MODULE 11: GETTING ON THE LIST

Setting Personal Political Goals

SESSION OVERVIEW:

This module focuses on tools participants can use to improve their prospects for getting on a party list. After completing a self-assessment on their readiness to run for office, participants will identify the opportunities and barriers in their home countries to getting on a list. As a group, they will develop a pool of strategies for getting on an electoral list; then participants will develop specific action steps to position themselves to be selected.

SECTIONS:

1. Self-Assessment – Are You Ready to Run?
2. Situational Analysis – What Challenges Do You Face?
3. Power Mapping – Identifying Barriers and Opportunities
4. Personal Action Plans – Planning for Success

LEARNING OBJECTIVES:

- Evaluating own readiness to run for office
- Identifying the process for getting on a list and who, specifically, makes the decision
- Assessing the opportunities and challenges to getting on a list
- Identifying strategies for positioning, developing relationships, exercising leadership, and demonstrating value to party leaders
- Selecting the strategies that best fit circumstances and creating a specific action plan for developing a profile and influencing party leaders

TIME: 190 minutes

MATERIALS:

- Flipchart and paper, markers and tape
- Training agenda (optional – can be written on the flipchart)

HANDOUTS:

- Quantitative Assessment Worksheet
- Qualitative Assessment Worksheet
- Final Analysis Worksheet
- The Power Mapping Chart
- Planning Sheet

PREPARATION:

Writing on the flipchart in advance:

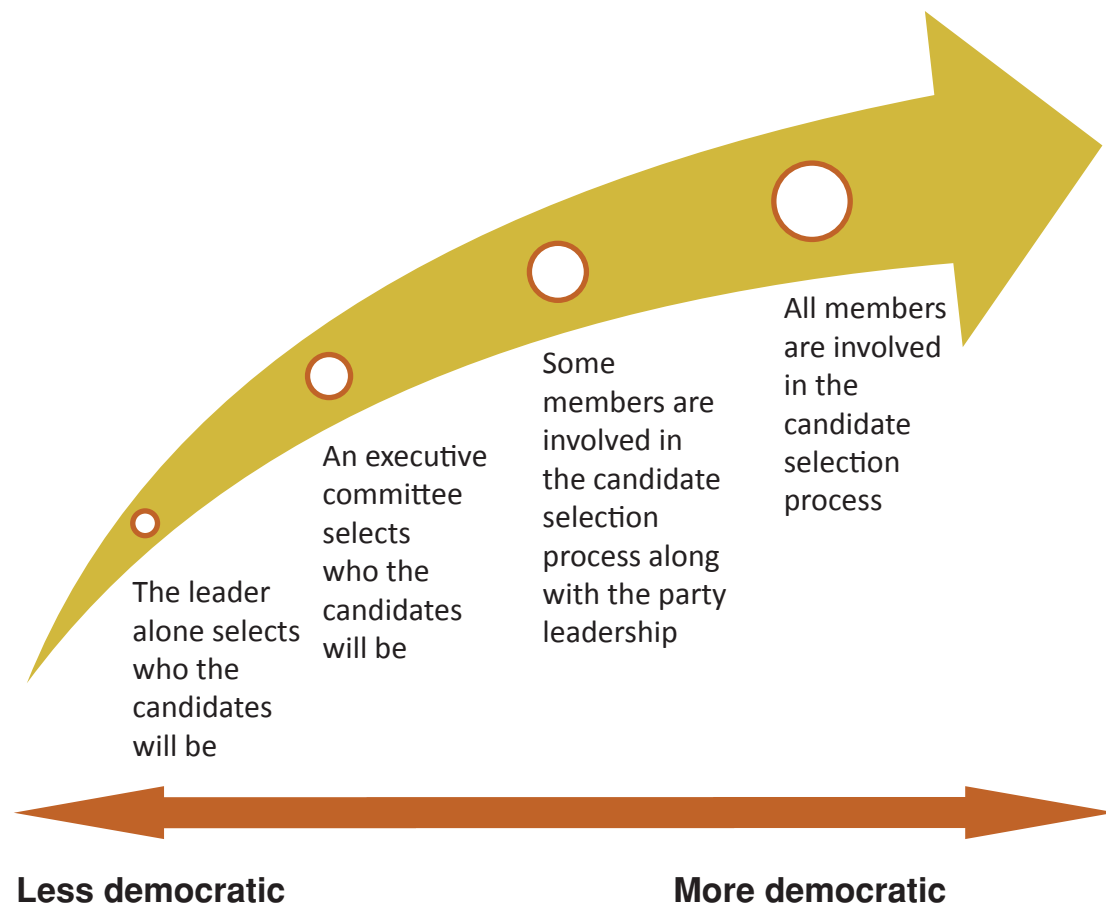
1. Agenda (optional – if it is not copied)
2. Learning Objectives
3. SITUATIONAL ANALYSIS:
 - THE LAW
 - THE POLITICAL PARTY

4. SITUATIONAL ANALYSIS: THE LAW REQUIREMENTS

- Age
- Citizenship
- Residency
- Income or financial status
- Education
- Criminal record
- Party membership
- Other?
 - Gathering signatures of support?
 - Financial records or file registration papers?
 - Filing fee to register as a candidate?

5. SITUATIONAL ANALYSIS: THE POLITICAL PARTY

HOW ARE DECISIONS MADE?



6. SITUATIONAL ANALYSIS: THE POLITICAL PARTY

WHO MAKES DECISIONS?

- PRIMARY DECISION-MAKERS
- SECONDARY DECISION-MAKERS

7. DECISION-MAKERS DIAGRAM: (note: leave outer circles blank)



8. POWER MAPPING CHART:

		Direction of Influence	
		Positive	Negative
Strength of Influence	Strong	<p>Keep involved and engaged in the effort</p> <p>Ask to state their support publicly</p> <p>Recruit to lobby undecided or Strong Negative decision-makers</p>	<p>Engage and actively seek to influence</p> <p>Use peers to attempt to influence</p>
	Weak	<p>Monitor and inform as necessary, with minimum effort</p> <p>Seek to move into Strong Positive quadrant if Power Map is heavily Negative</p>	<p>Keep informed so that they do not move into Strong Negative</p>

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

TRAINING ACTIVITIES

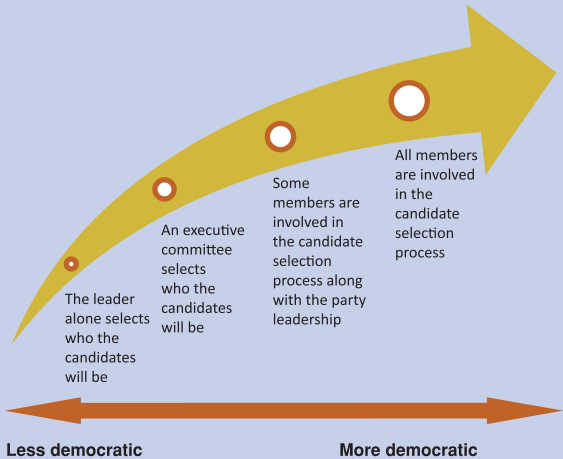
SECTION 1 – Self Assessment – 45'

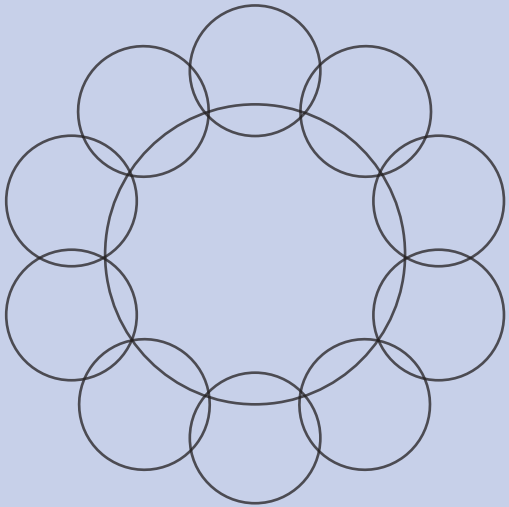

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the session and review the learning objectives.	TP	2	
2	<p>To get the participants to start focusing on the topic, begin with a few general questions such as:</p> <ul style="list-style-type: none"> - What do you think is important to consider once you make a decision to run for an office? - Is it enough to just decide yourself you would be a good representative, or does it take more than that? - Are there any aspects of your life that would require adjustments after you decide to run? - What preparations do you need to do? <p>Facilitate a short discussion.</p> <p>Summarize:</p> <p><i>Running for office is an important and demanding task. It requires deep conviction, motivation, and courage. Although campaigns can be exciting and energizing, they can also be confrontational and divisive.</i></p> <p><i>To be successful, it is vital that you fully prepare for the challenges ahead. Start by conducting the self-assessment to evaluate where you are now and to think through some of the work you will have to do to get the support you need to organize an electoral campaign.</i></p>	DBR + TP	3	

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
3	<p>Tell the participants they will be asked to fill out several questionnaires which will help them conduct the self-assessment. Ask them to be as honest and frank as possible in their answers; this is confidential information and will only be shared if they want to do this.</p> <p>Distribute the Quantitative Assessment Worksheet and Qualitative Assessment Worksheet ask the participants to rate their level of preparedness in a first one (for each task on a scale of 1 = have not yet started task to 5 = task is complete) and answer questions in the second one.</p>	PEE	40	<p>Some participants may feel this information is too personal to share, but others may want to discuss it if there are issues that have been on their minds. Prepare for both possibilities. Ask participants if they would like to share or talk through any of their answers and, if so, facilitate a discussion. If not, ask participants which of the issues on the worksheet concern them the most, in terms of being prepared to run for office.</p>

SECTION 2 – Situational Analysis – 40'

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduction:</p> <p><i>Now that you have conducted an assessment of your own readiness to stand for elected office, the next step is to analyze the environment in which you will be running.</i></p> <p><i>There are a number of key factors in conducting a situational analysis for an electoral campaign. These include what the law says about candidate eligibility and candidate selection, the candidate selection process exercised by political parties, and the realities of what actually happens in practice (as opposed to what the regulations say should happen).</i></p>	TP	2	<p><u>SITUATIONAL ANALYSIS:</u></p> <ul style="list-style-type: none"> - THE LAW - THE POLITICAL PARTY
2	<p>Lead the participants through following questions:</p> <p><i>What does the law say about who is eligible to stand for office? What are the requirements or disqualifications for candidacy?</i></p> <ul style="list-style-type: none"> - Age - Citizenship - Residency (e.g., do you have to prove you have lived in the country or the district for a certain amount of time?) - Income or financial status (e.g., free from bankruptcy or claims of financial wrongdoing) - Education - Criminal record (e.g., free from serious criminal convictions for a certain amount of time or indefinitely) - Party membership <p><i>Are there any other legal requirements for declaring yourself a candidate? For example, do you have to gather signatures of support? Or to produce financial records or file registration papers?</i></p> <p><i>What is the filing fee, or cost, to register as a candidate?</i></p>	DBR	5	<p><u>SITUATIONAL ANALYSIS: THE LAW REQUIREMENTS</u></p> <ul style="list-style-type: none"> • Age • Citizenship • Residency • Income or financial status • Education • Criminal record • Party membership • Other? - Gathering signatures of support? - Financial records or file registration papers? - Filing fee to register as a candidate?

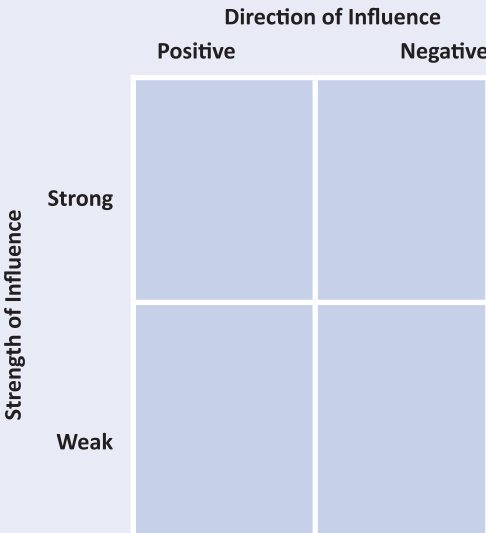
Steps	Description	Type	Min	Note to the Trainer
3	<p>Ask the participants if the law says anything about how political parties should choose their candidates.</p> <p>Introduce the situational analysis for the political party:</p> <p><i>Every political party selects candidates in its own way. A party's candidate selection process typically evolves over time, depending on the internal culture of the organization and the degree to which party officials and members expect and demand to be involved.</i></p> <p><i>Every system of candidate selection has its benefits and disadvantages, but it is important to understand what the system is if you aspire to be a candidate in a winnable seat. Candidate selection processes fall somewhere on the spectrum illustrated on the flipchart.</i></p>	TP	10	<p>In most of countries the law provides legal framework and regulates only registration of political parties, but does not have any provisions on how a party should be organized and what its bylaws have to include.</p> <p><u>SITUATIONAL ANALYSIS: THE POLITICAL PARTY</u></p> <p><u>HOW ARE CANDIDATES SELECTED?</u></p> 
	<p>Explain the spectrum.</p> <p><i>First thing to consider is HOW decisions are made within your political party about who gets to stand as a candidate. Is the process transparent and competitive, or are candidates selected in a restricted process (behind closed doors)?</i></p> <p>Take few minutes for discussing this matter with the participants, and then continue.</p> <p><i>The next matter to deal with is WHO actually makes the decisions about candidate selection. In most political parties, there are primary and secondary decision-makers.</i></p> <ul style="list-style-type: none"> • Primary decision-makers are those individuals with the official authority and position to determine what will happen within the political party. • Secondary decision-makers are those individuals who influence primary decision-makers and therefore can also have an impact on what choices are made. 			<p><u>SITUATIONAL ANALYSIS: THE POLITICAL PARTY</u></p> <p><u>WHO MAKES DECISIONS?</u></p> <ul style="list-style-type: none"> - PRIMARY DECISION-MAKERS - SECONDARY DECISION-MAKERS

Steps	Description	Type	Min	Note to the Trainer
	<p>Consider the diagram on the flipchart. At the center of the circle is the official decision-maker who has formal authority over the party's choices. These individuals are typically senior party leaders and elected officials.</p> <p>In the outer ring are the secondary decision-makers. These are individuals who make up the personal and professional networks of the primary decision-maker, and who have the ability to influence that primary decision-maker.</p> <p>Ask participants what kinds of people might be secondary decision-makers, and write their answers in the circles around the decision-maker circle. Be ready to suggest any categories from the original diagram that don't come up in the brainstorm.</p> <p>Women, young people and other demographic groups that are less represented in politics often find that they have fewer connections among the primary decision-makers, but they have much stronger networks among secondary decision-makers.</p> <p>Keep in mind the self-interest and future ambitions of these decision-makers as you decide how to approach them. For example, some of the secondary decision-makers may aspire to one day become a primary decision-maker, and be more inclined to endorse you if they believe that you will later support their own ascent in the party hierarchy.</p>			<p>Draw a blank ring of circles, with the Decision-Maker in the center, for the exercise on Secondary Decision-Makers</p>  <p>The completed diagram may look something like this:</p> <p><u>DECISION-MAKERS DIAGRAM</u></p> 

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
4	Ask all participants to individually identify and write down all the primary decision-makers from their party, and some of the key secondary decision-makers around those people. Give them 1-2 minutes.	ANK + DBR	10	As a home task, you could ask participants to complete the Decision-Makers Diagram for all the the primary decisions-makers on their lists.
5	Distribute the Final Analysis Worksheet and ask the participants to, based on their answers in this section, rate their likelihood to be selected as a candidate under current legal requirements in their country and political conditions in their political party. Invite participants to share their findings and facilitate a brief discussion on this.	PEE	13	

SECTION 3 – Power Mapping – 35’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the section:</p> <p><i>You have conducted an assessment of your own readiness to stand for office, as well as a review of the legal requirements you must meet and an analysis of the internal political challenges you face in your own political party.</i></p> <p><i>The next step is to figure out what your strategic response should be to this situation.</i></p> <p><i>This section will walk you through some options to inform your strategic response to this situation. Even if your final analysis suggests that there is a very good chance you will be selected as a candidate, there are likely to be a few obstacles that still stand in your way. It is important to think through how you will deal with these in order to build this goal into a reality.</i></p> <p><i>If your analysis indicates that it will be a real challenge for you to get into a winnable position as a candidate, then it is even more important that you construct a strategic response which has the potential to alter this situation and improve your electoral fortunes!</i></p>	TP	2	
2	<p>Have a Power Map drawn on the flipchart and introduce it:</p> <p><i>Power Mapping is a classic tool for charting the way forward in a challenging political environment. Power Mapping involves figuring out who has power and influence, and then sorting these decision-makers according to their likely response to, and effect on, a proposed action. In this case, the proposed action is your intention to become a viable candidate for elected office. Power Mapping allows us to identify the best response to a situation, including identifying ways to maximize the assistance of supporters and minimize the impact of opponents.</i></p>	TP + DBR	10	

Steps	Description	Type	Min	Note to the Trainer
	<p>Ask the participant how they should manage or interact with people in each of these groups. Have a short discussion and then explain by writing the following strategic responses in the appropriate box:</p> <p>Strong and Positive: <i>Keep involved and engaged in the effort</i> <i>Ask to state their support publicly</i> <i>Recruit to lobby undecided or Strong Negative decision-makers</i></p> <p>Strong and Negative: <i>Engage and actively seek to influence</i> <i>Use peers to attempt to influence</i></p> <p>Weak and Positive: <i>Monitor and inform as necessary, with minimum effort</i> <i>Seek to move into Strong Positive quadrant if Power Map is heavily Negative</i></p> <p>Weak and Negative: <i>Keep informed so that they do not move into Strong Negative</i></p>			<p>POWER MAPPING CHART:</p> 
3	<p>Ask the participants to review the lists of primary and secondary decision-makers they made earlier and ask them to think about how each individual would respond or react to their plans to become a candidate in a winning position. Are they likely to respond positively or negatively to the idea? How strong will their response be? Distribute the Power Mapping Chart to participants and ask them to chart the decision-makers on their list in the handout.</p> <p>Ask some of the participants to share their findings and thoughts with the group, and facilitate a brief discussion.</p>	ANK	8	<p>For the debrief you can use the following questions:</p> <ul style="list-style-type: none"> - What has your Power Map revealed? - Do you have more people potentially supporting you than you thought? - Is the opposition stronger than you had realized? - Who do you need to move into a different quadrant?

<i>Steps</i>	<i>Description</i>	<i>Type</i>	<i>Min</i>	<i>Note to the Trainer</i>
4	<p>Ask the participants to look at the Power Maps they have created and, keeping in mind the position of primary and secondary decision-makers on the power map and their main interests, to write down what they think their message should be for each of them.</p> <p>In other words, what should participants say to each of these individuals to get their support?</p> <p>Ask a few participants to share some of their examples.</p>	PEE	5	

SECTION 4 – Personal Action Plan – 68’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Now that the participants have an understanding of the challenges ahead, ask them if they can think of very specific ways that they can start to work towards achieving their goals, or ensuring their candidacy. Encourage participants to think of projects or actions they could take that would help get them there. Write their answers on the flipchart and encourage ideas such as the following:</p> <ul style="list-style-type: none"> - Organizing meetings with primary or secondary decision-makers to build relationships - Meeting with strong supporters and developing a plan - Taking on a project within the party to demonstrate ability and loyalty 	DBR	5	
2	<p>Summarizing previous brainstorming:</p> <p><i>One of the ways that you can invest in your personal political goals is to connect your success to the success of your party. This means tying the work that you are doing to build your own profile as a potential candidate to the essential work of building the party's profile and improving its chances of winning more seats.</i></p> <p><i>Ask yourself whether there is a specific project that you can implement within your political party which is likely to have multiple outcomes, namely:</i></p> <ol style="list-style-type: none"> 1. <i>Raising your profile and essential contribution to the party</i> 2. <i>Improving the party's operational or electoral performance</i> 3. <i>Improving your own leadership and communication skills</i> 	TP	3	<p><i>Examples might include:</i></p> <ul style="list-style-type: none"> • <i>Building the party's base of support in new areas through a grassroots voter contact effort</i> • <i>Organizing and implementing a formal training program for party campaign staff and volunteers</i> • <i>Creating models and options to improve internal communication</i> • <i>Developing a stronger external communication, press and media department</i> • <i>Expanding the party's outreach to new demographic groups, including women, young people and ethnic minorities</i> <p><i>Demonstrate high level of expertise in a specific field; appear often on media with interviews and participate in debates</i></p>

Steps	Description	Type	Min	Note to the Trainer
3	<p>Assign the final exercise: Using the Planning Sheet handout, create your personal plan for consolidating your support within the party.</p> <p>Debrief by asking participants to present their whole plans (if there is time), or ask them to name at least 3 things from their Planning Sheets that they will do to achieve their goals.</p>	ANK	60	

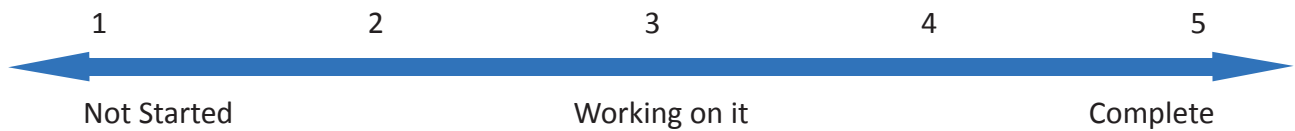
CONCLUSION – 2'

For many candidates, especially women and young people, securing a strong position on a party list is a tougher challenge than running for office. Preparing yourself is vital, both by understanding the rules governing eligibility and your party's selection process. Most important of all is putting in place a strategy for cultivating support among the party's key decision-makers.

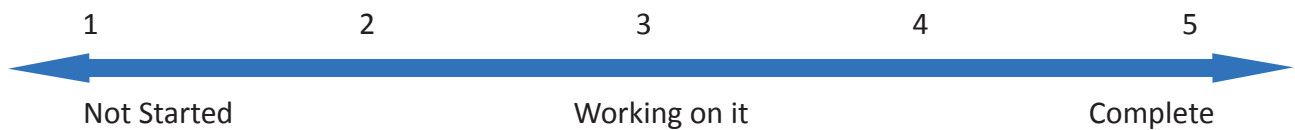
Quantitative Assessment Worksheet

Rate your level of preparedness for each task on a scale of 1 (have not yet started task) to 5 (task is complete).

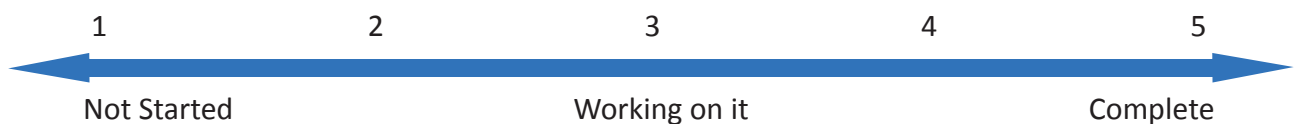
1. **I know why I want to run for office.**



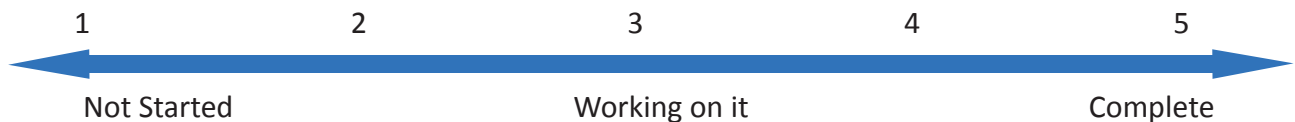
2. **I know what I want to accomplish while in elected office.**



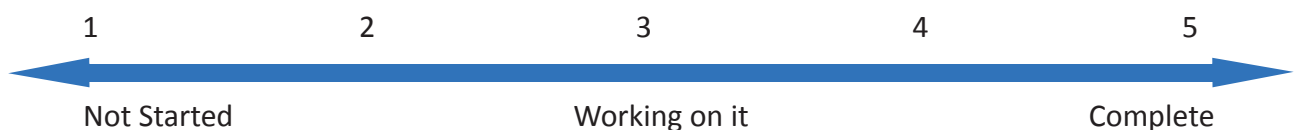
3. **I can accurately describe the social, economic and demographic breakdown of the area I hope to represent.**



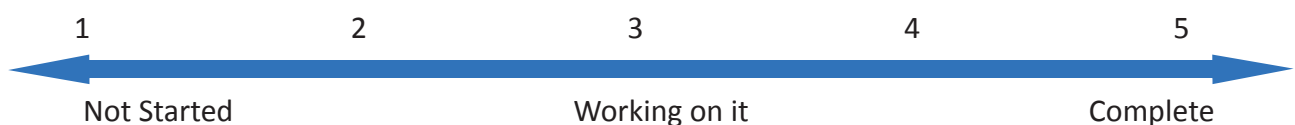
4. **Have a list of at least 10 people I can contact for financial support.**



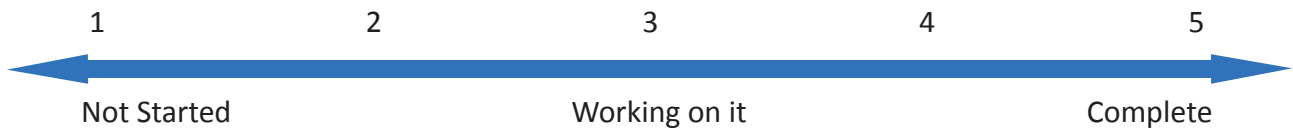
5. **I have estimated the costs of running for office in a draft budget.**



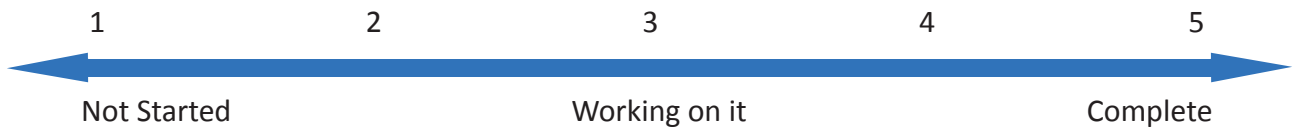
6. **I have developed contacts with the relevant print, broadcast and social media.**



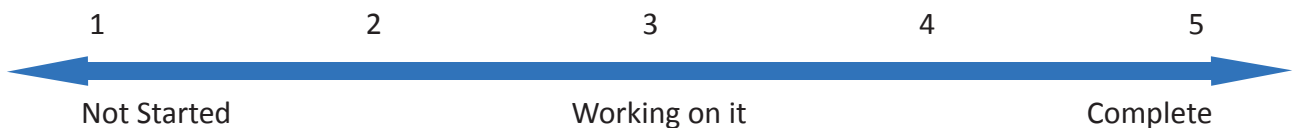
7. I have conducted an assessment of my likely opponent(s) in terms of how many votes they will get and their financial resources.



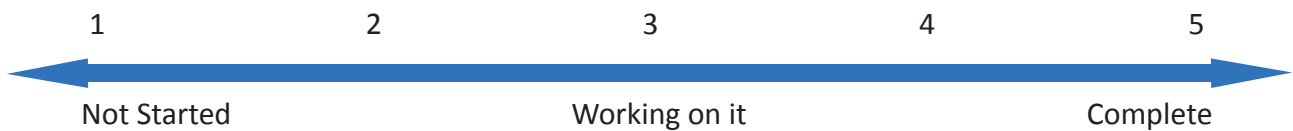
8. I have conducted a voter analysis of the area.



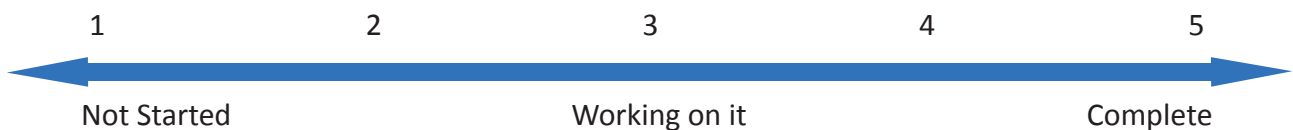
9. I have conducted a vote count for the area and determined that there will be sufficient votes for me to be elected.



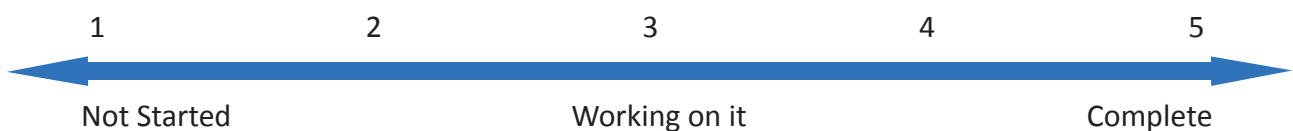
10. I have addressed all financial, personal or legal issues (problems) which would make it difficult for me to be a candidate.



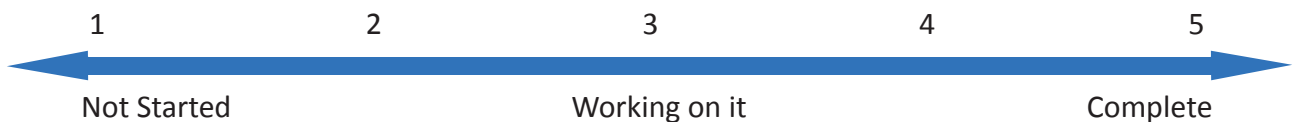
11. I have written down my biography (description of personal and professional experience, and qualifications) and it is accurate.



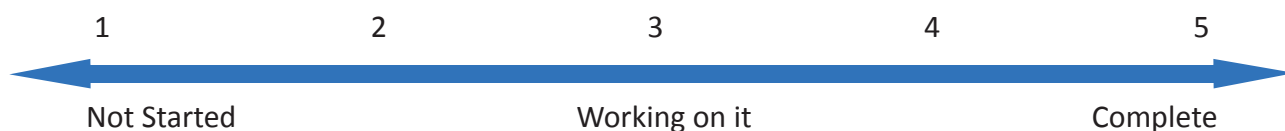
12. I have made the time to take on a demanding communication and voter contact schedule.



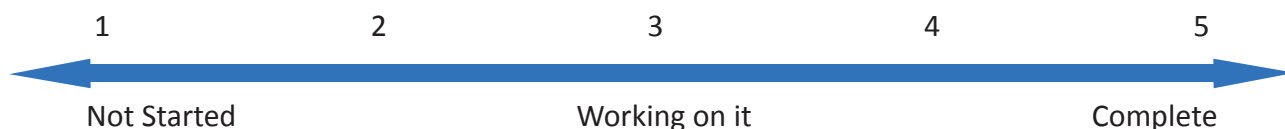
13. I know the rules and regulations affecting this election.



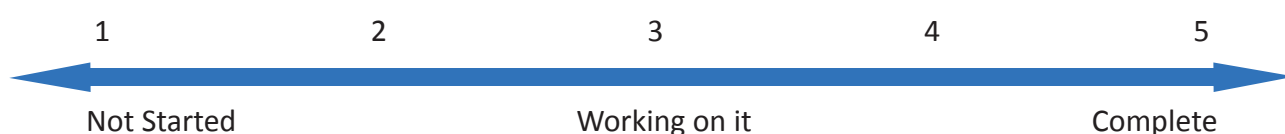
14. I have strong appeal in the area, and am well-known in and well-connected to the local community.



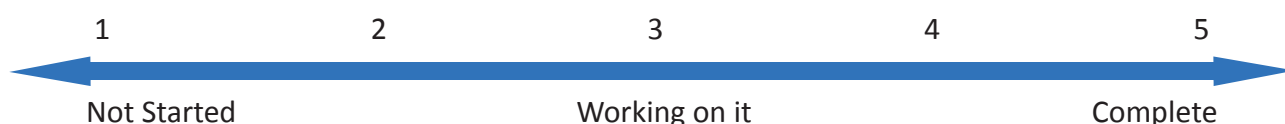
15. I have a message which is relevant and appealing to voters in the area.



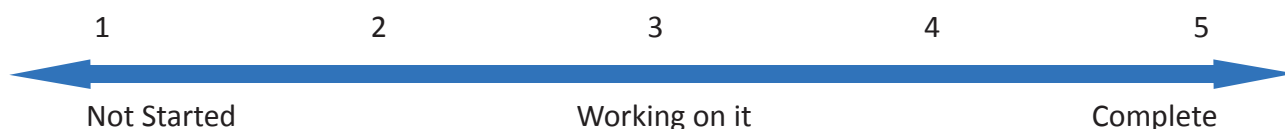
16. I have developed close working relationships with key decision-makers in my political party.



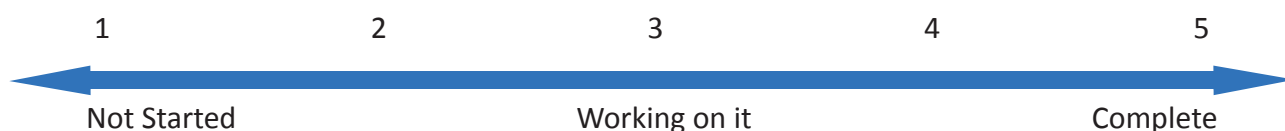
17. I have a constituency of grassroots party activists and well-known leaders in my party who support me.



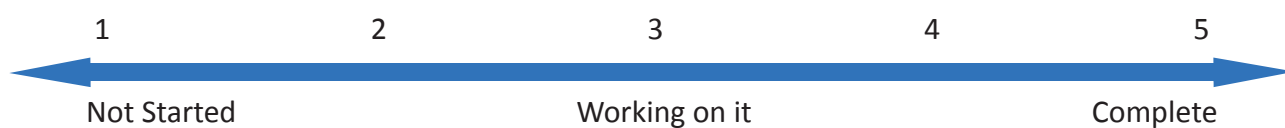
18. I have had discussions with my family so that they understand the time commitment and incursions on privacy and family life that my running for office will require, and they are supportive of my running.



19. I am adequately prepared and trained on public speaking and voter contact.



20. I have a group of trusted advisors.



Qualitative Assessment Worksheet

Answer the following questions, in your own words:

1. Why do you want to run for office?

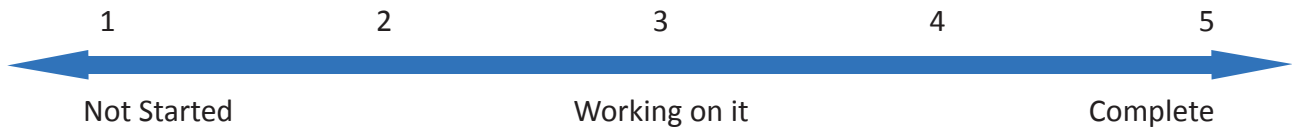
2. What ideas or experience would you bring to elected office that is new, different or better?

3. Can you name three things that you want to work on or accomplish while in elected office?

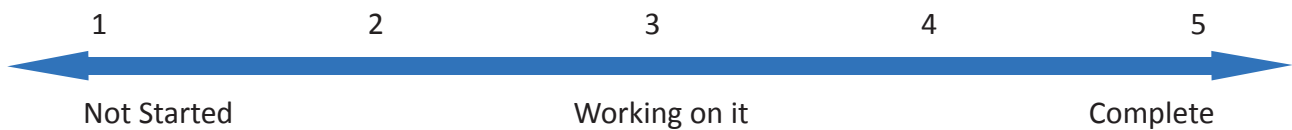
Final Analysis Worksheet

Rate the veracity of each statement below:

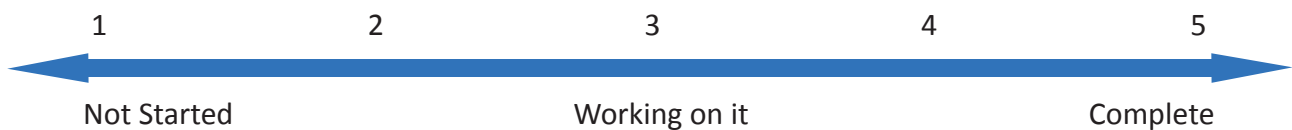
1. I currently meet all the legal requirements to be a candidate for elected office in my country.



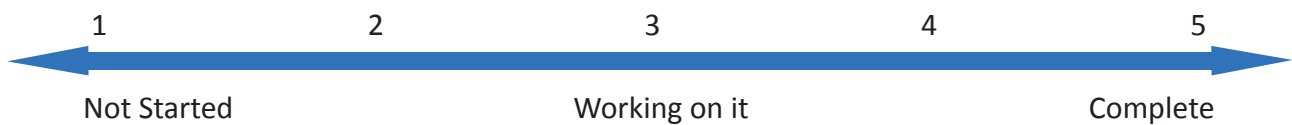
2. The candidate selection process in my party favors my selection as a candidate.



3. Primary decision-makers in my party favor my selection as a candidate.



4. Secondary decision-makers in my party favor my selection as a candidate.



Direction of Influence

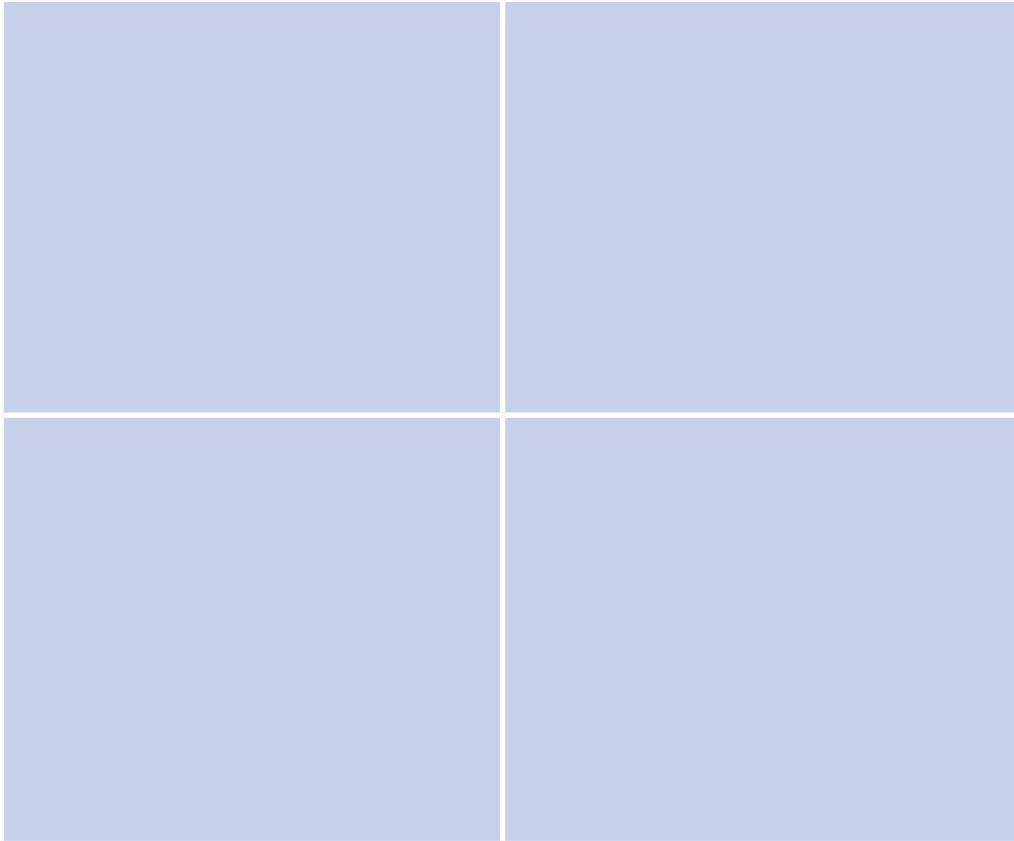
Positive

Negative

Strength of Influence

Strong

Weak



Practice to address	Improvement goal	Action items	Measures of success	Completion date	Support required
Party Development Project					
1.					
2.					
Personal Development Aspects					
1.					
2.					

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Since its founding in 1983, NDI and its local partners have worked to support and strengthen democratic institutions and practices by strengthening political parties, civic organizations and parliaments, safeguarding elections, and promoting citizen participation, openness and accountability in government.

With staff members and volunteer political practitioners from more than 100 nations, NDI brings together individuals and groups to share ideas, knowledge, experiences and expertise. Partners receive broad exposure to best practices in international democratic development that can be adapted to the needs of their own countries. NDI's multinational approach reinforces the message that while there is no single democratic model, certain core principles are shared by all democracies.

The Institute's work upholds the principles enshrined in the Universal Declaration of Human Rights. It also promotes the development of institutionalized channels of communications among citizens, political institutions and elected officials, and strengthens their ability to improve the quality of life for all citizens.

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This manual was funded by a grant from the United States Department of State. The opinions, findings and conclusions stated herein are those of the authors and do not necessarily reflect those of the United States Department of State.

This project is funded through the U.S. Department of State, Bureau of Near Eastern Affairs, Office of the Middle East Partnership Initiative (MEPI). MEPI is a unique program designed to engage directly with and invest in the peoples of the Middle East and North Africa (MENA). MEPI works to create vibrant partnerships with citizens to foster the development of pluralistic, participatory, and prosperous societies throughout the MENA region. To do this, MEPI partners with local, regional and international non-governmental organizations, the private sector, academic institutions, and governments. More information about MEPI can be found at: www.mepi.state.gov

