



*Tapping into*  
**The Volunteer  
Resource**

# **Volunteers & Activists**

**DRAFT**

**DEMOCRATIC**  
**GAIN**  
**Training Manual**

[www.DemocraticGAIN.org](http://www.DemocraticGAIN.org)





**DEMOCRATIC**  
**GAIN**

**Volunteers & Activists 2004**

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## **About this manual:**

This manual has been updated, compiled and rewritten from earlier training manuals published in 1995 and 1996 by the Democratic National Committee and EMILY's List. As part of a seven-book series, it aims to give Democratic campaign workers the tools they need for victory.

### **Democratic GAIN manual series:**

- Administrative & Legal
- Campaign Strategy
- Communications
- Fundraising
- Technology
- Volunteers & Activists
- Voter Contact

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# Facts About Democratic GAIN

## What is Democratic GAIN?

The Democratic Grassroots Action Institute & Network (GAIN), is a new professional organization dedicated to promoting campaign work as a profession and to improving the conditions for Democratic and progressive campaign workers, by developing, benefits, recruiting, training, and providing career advancement and network opportunities. GAIN seeks to enhance the quality of campaign workers' job satisfaction by establishing professional standards, and career advancement trainings and certifications designed to develop political intuition and campaign skills to their fullest.

## Why was Democratic GAIN created?

For years, dedicated campaign workers and grassroots organizers have devoted long hours and hard work to candidates and causes they believe in. These workers have strived to make careers out of an occupation that offers minimal job security and virtually no tangible benefits. As a result, the field of skilled campaign workers and grassroots organizers loses experienced, talented, and qualified professionals each campaign season. Until recently, no group existed to help coordinate the interests of individual campaigns, political committees, issue advocacy campaigns, and the professionals they employ.

## What can Democratic GAIN do for me?

In order to improve and maintain the quality of skilled professionals working in the field of campaign and grassroots organizing, an association of leading political organizers has established the Democratic Grassroots Action Institute & Network (GAIN) to offer training, education and career services to campaign workers and grassroots organizers.

## Democratic GAIN's objectives include the following:

- Create a voluntary membership network of organizers who work on progressive political or issue campaigns and promote their shared professional interests;
- Initiate programs and events aimed at promoting professional progressive campaign organizers;
- Become a communication vehicle for campaign workers in different states;
- Promote events that both educate and create opportunities to gather socially;
- Establish educational and training programs;
- Provide support to campaign workers in finding employment, not only during the campaign cycle, but also more permanent positions once cycles end;
- Provide support to progressive campaigns, organizations, and individuals in recruiting professional campaign workers;
- Recruit and train new progressive organizers to build the profession;
- Establish mentor programs to link senior experienced campaign professionals with those interested in entering the campaign profession;
- Provide a set of tangible benefits to members of the association.

## What is the legal status of Democratic GAIN?

GAIN is a professional organization exempt from taxation as a business league under section 501(c)(6) of the Internal Revenue Code. GAIN is a membership organization that also receives support from non-member sponsors. GAIN does not itself engage in any voter contact or partisan political activity or communications of any kind and does not engage in lobbying activity of any kind.

Dues paid to and contributions to GAIN are not tax-deductible as charitable contributions for federal income tax purposes. Companies belonging to GAIN should consult their tax advisors to determine the extent to which dues may be deductible as a business expense.



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# Introduction

What are the three most limited and valuable resources in campaigns?  
PEOPLE, TIME and MONEY.

Too often in modern campaigns the role of volunteers is under-valued and therefore volunteers are under-utilized. In fact, a campaign cannot pay enough people to get done all that needs to be done.

We hope this manual will set realistic expectations of the campaign's use of volunteers and give volunteers and activists an idea of the roles they might fill in a campaign. It will talk about how to recruit the volunteers you need, the importance of matching volunteers' interests and skills to the jobs that need to be done and how to schedule volunteers so that their time is put to maximum use.

Remember, volunteers come to the campaign for many reasons. They may support the candidate because he or she is the nominee, they may support the candidate because of his or her position on specific issues, and they may belong to a group that has endorsed the candidate. No matter what the reason they came to volunteer, their goal is to win. Respect that and give them meaningful jobs and detailed instructions and they will keep coming back to help.



## CHAPTER ONE

# Why Your Campaign Needs Volunteers

Volunteers are one of the most important and least appreciated resources of a campaign. Whether your campaign is for school board or for U.S. Senate, you need volunteers to get the job done.

During the course of your campaign you will need to:

- Distribute anywhere from one hundred to hundreds of thousands of pieces of literature;
- Make anywhere from one hundred to hundreds of thousands of voter identification phone calls;
- Fax anywhere from one hundred to thousands of press releases, and place thousands of radio actualities;
- Solicit funds from thousands of people to meet your campaign budget, and put on dozens of small- and large-dollar fundraising events;
- Research dozens to hundreds of publications and voting records to get background information on your candidate and your opponent, and,
- Knock on the doors of and call anywhere from hundreds to tens of thousands of voters.

In other words, there is no way to win without the competent, responsible assistance of volunteers.

Conventional wisdom holds that the main reason to have a volunteer operation is to implement the campaign field plan. No longer. Now, every facet of the campaign can use volunteer help.

Involving volunteers also reinforces the image of a campaign as having popular support (i.e., a “people-oriented” message). Democratic campaigns, in particular, need strong volunteer support to build a grassroots operation and encourage participation. This will help fight the notion that politics and politicians are aloof and irrelevant to real people.

Your volunteer network will also help fight the stereotype that campaigns are run and won by paid TV ads and consultants. If we do not involve people in elections, we undermine the very reason for campaigns—to build popular support for Democratic candidates.

## What Makes a Good Volunteer Coordinator?

The most important thing you can do to ensure a good volunteer effort is to find a good volunteer coordinator.

The volunteer coordinator is the most important person in any volunteer operation since he or she will be on the front lines of a campaign. Because of that, the position has often been described as one of the most difficult on a campaign.

If your campaign is a congressional race or larger, this position should be full-time and paid. If not, the candidate or campaign manager may also be the volunteer coordinator. Many campaigns make the mistake of combining the responsibilities of this position with those of the field director or office manager, or worse yet, have no one assigned to fill that role. This is a very big mistake. There is no volunteer-free period in your campaign. Volunteers are needed during the day, evening and weekends. As everyone who has worked on a campaign knows, there is more than enough to do without having people double up on responsibilities.

Your campaign must realize the value of this position. A good way to understand the importance of a full-time volunteer coordinator is to add up the value of a good volunteer operation. For example, if your campaign needs to contact 10,000 potential voters there is a vast difference between what it would cost to have a paid phone bank through a consulting firm, versus an in-house volunteer phone bank. The volunteer phone bank would obviously cost a lot less money (although it isn't free—see section on how to do a volunteer budget), and saving the campaign that kind of money will be important.

The traits discussed in the following pages are important for a good volunteer coordinator and would probably be useful in your other staff as well.

## Your Volunteer Coordinator Should Be Well-Organized

He or she will need to keep track of many ongoing projects and materials (mailings, phone-sheets, etc.) In addition, the coordinator also needs to have periodic projects available – ones that have no immediate deadline such as looking up precinct numbers for the volunteer files, data entry or stacking literature in bundles of 50 – so there is always a task for any volunteer who walks in the door. For example, on the same day as a mailing for the biggest fundraising event of the campaign, there may also be a few more crises for which you need people: someone to leaflet an opponent's press conference, a back-up person to answer the phone because the regular person had a family emergency, another person to go to all the radio stations in your district to pick up the new media buy information and still fill ten lines at the phone-bank that evening; in short, a typical day.

## Your Volunteer Coordinator Needs to Be Able to Get Along with Volunteers

The volunteer coordinator is the lifeline to the volunteer. He or she provides projects, advice, deadlines, food, coffee, recognition and other vital needs. He or she acts as the go-between with the campaign staff, some of whom may not be good at dealing with volunteers, may be too busy to do so, or may not be as appreciative of their help as they should be. For example, a finance director, who is responsible for raising \$100,000 at a big fundraising dinner, will probably not have time on the day of the dinner to deal with the volunteers who will check in the guests and collect their money. It is up to the volunteer coordinator to make sure that the volunteers are trained and that everyone is in their right place at the right time. It is also up to the volunteer coordinator to troubleshoot and ensure quality control throughout the project.

## Your Volunteer Coordinator Needs to Be Able to Deal with Other Campaign Staff Members

Your staff needs to feel comfortable handing over major projects to the volunteer coordinator, knowing that they will get done on time and correctly. In addition, the volunteer coordinator has to anticipate what type of volunteers and deadlines a project requires. For example, the campaign press secretary might not have mentioned that he or she will need volunteers for an upcoming press conference. But a good volunteer coordinator, upon hearing in a staff meeting that a press conference is coming up the next day, will realize that volunteers are needed, approach the press secretary and find out that they need people to fax out the press advisory, collate the packets, staff the table

at the conference and then come in the next morning at 5:00 a.m. to feed radio actualities from the event.

### **Your Volunteer Coordinator Needs to Be Flexible**

Campaign situations can never be fully anticipated or planned for. So when something happens to throw off plans, your volunteer coordinator needs to be flexible enough to roll with the punches. For example, your volunteer coordinator might have filled a 10-line phone bank that was supposed to do voter identification calls. But, if a nationally-prominent Democratic elected official suddenly decided to hold a rally in your area, now the callers need to use the lines for turn-out calls for the event. Additional volunteers may also be needed for leafleting.

### **Your Volunteer Coordinator Needs to Be Friendly, Outgoing, Even-Tempered and Optimistic**

Your volunteer coordinator is the face of the campaign for your volunteers (who should also be considered potential voters). Many of these people will take their views about the campaign and the candidate from the way your campaign treats them. For example, if the volunteer coordinator is in a screaming fight with the field director, and volunteers witness this, they could get discouraged and not want to volunteer anymore.



## CHAPTER TWO

# Why People Volunteer

Understanding why people volunteer will help you to push the right buttons to get them to volunteer. Here are some reasons people give their time to campaigns (or any volunteer work):

- They are related to the candidate;
- They are friends of the candidate;
- They get some personal benefit out of it;
- It is social, and gets them out of their houses;
- They are interested in policy;
- They want to meet like-minded people;
- They are looking for a job;
- They are party loyalists, and will work for the nominee;
- They are looking for recognition.

Unless you've actually been a volunteer (or a volunteer coordinator) it might be hard to understand why someone would put in long, hard hours of sometimes tedious work with their only reward being a thank you note and a slice of cold pizza—if they're lucky. Therefore, before your campaign can really begin to create a plan and recruit volunteers it's a good idea to examine the other reasons, besides free food, why people volunteer for a political campaign. Everyone you will recruit will probably fall into one or more of the categories listed.



*Find out why someone wants to volunteer—and then make sure he or she finds that in their work in your office.*

Understanding these reasons can help your campaign build and maintain a strong volunteer program by appealing to people based on their own internal motivations.

**Policy** – These are people who work for a candidate because they care about where he or she stands on an issue or they want to work against someone who opposes their position on their favorite issue.

The good thing about these types of volunteers is that they will, for the most part, be zealous in their work. For example, if you are pro-choice and your opponent is anti-choice, you can bet that the volunteers motivated by that issue will be some of your hardest workers.

A concern about these types of volunteers is that they may try to make their issue the cornerstone of your campaign (which may not fit into the overall campaign plan). For example, the strongly pro-choice volunteers might push to include that issue in all mailings, press releases, etc. Also, they may feel that you are not focusing enough on their issue.

**Social** – These are people who work for a candidate to extend their social network. Sometimes people who have just moved into town get involved in a campaign to meet their new neighbors or people with similar interests.

The good thing about these types of volunteers is that by making your campaign fun and volunteer-friendly you will be able to keep and attract a lot of them.

**Political** – These are people who work for a candidate because they are party loyalists. They always work on Democratic campaigns and always will.

The good thing about this type of volunteer is that as long as you're a Democrat, they will be there to help. Also, they are often the most experienced people with the widest networks of contacts in a given precinct.

A concern about these volunteers is that they may have become set in their ways and may be unwilling to entertain new ideas that change the way things have always been done. For example, your field plan might call for each targeted precinct to receive three literature drops in the final days of the campaign, but your political volunteer/precinct worker response might be that he or she has always done one drop, right before Election Day, and that's all he or she is willing to do.

**Opportunity** – These volunteers work for a candidate because they want something out of it—a job, money or perhaps a political appointment. Sometimes students volunteer to get a job or college reference or a summer internship. This type of volunteer has a motivation for working on your campaign and could be easy to recruit. For example, some high school government teachers are willing to give students credit for working on political campaigns.



One concern is that when these volunteers realize that there is no job or money available on your campaign they may take their free time elsewhere. For example, you may not be able to spend money to hire any more field coordinators, or the volunteer may not be qualified for the job he or she wants. Whatever the situation, volunteer work should always be valued.

*Never forget to thank your volunteers. For many, it's all they are looking for.*

**Recognition** – These are people who work for a candidate because they want something intangible out of the campaign—self-esteem, respect, a change from the routines of their lives.

By giving these volunteers the proper respect and support they deserve, you will be able to keep them happy and busy. For example, a volunteer who works a regular nine-to-five job in a large company will probably be very excited if the candidate speaks to him or her personally during a campaign volunteer party.

If your campaign is low on recognition for volunteers, you could lose them. For example, if your volunteers are segregated from the staff and candidate (like at a phone bank far away from the main campaign office), the campaign might not seem like much of a change from the volunteer's regular job.

### Volunteer Story:

*I was working in a Presidential primary campaign office in 1992 and the candidate was speaking to several hundred people in a public square across the street from the office. This woman walked in the door. She looked about 16 years old. She asked if there was anything she could do to help, and before even asking her name, I stuck a clipboard in her hand and sent her out to sign up volunteers. She came back in an hour with dozens of names. I pointed her at a mailing that needed to go out, and soon she was marshalling about a dozen people in a highly organized assembly line. I found out that her name was Beth, and among other things, she was 25 years old and a national chess champion. Everything I threw at Beth, she could do, and without needing detailed instructions. At the Election Night party, she said, "Where do we go next?" We couldn't afford to hire anyone, but she hitched a ride and came along to the next state, and the next, and so on. Our candidate eventually dropped out of the race and went home to start a new political organization. The one person kept on as the Executive Director? My dear, long-time friend, Beth. Never underestimate the potential of anyone who walks in your door. You never know what they can do until you let them try.*

*Antonia Scatton  
Oakland, California*



## CHAPTER THREE

# Volunteer Recruitment Plan

### How to Get Others to Do the Work for You

The best source of volunteers and activists for your campaign is people who have already invested in the candidate or issue with a donation, endorsement or personal relationship. Another great source is the ranks of those already active in politics or groups that have a history of political action. While your campaign should work to attract new recruits, people who already volunteer are the best initial group to go after. Also, be sure that volunteer sign-up cards are available at every event, and encourage staff to always have sign-up cards readily available. Another way to recruit volunteers is through the Internet and e-mail. Sending campaign updates through blast e-mails is a great way to keep people informed and make them feel like they are part of the campaign because they are.

One of the easiest ways to identify community activists and political volunteers is to make a list of people you know who belong to community organizations. This list should be as inclusive as possible. Some organizations that could be on the list include:

- Former campaign volunteers
- Neighborhood organizations
- Fundraising groups
- Religious organizations
- Women's organizations
- Minority or ethnic organizations
- Youth clubs
- Trade organizations
- Environmental organizations
- Volunteer fire companies
- Service organizations

- Veterans organizations
- Young/College Democrats
- Democratic party activists
- Labor unions
- Peace groups
- Senior citizen organizations
- Fraternities/sororities
- Alumni associations
- Sports organizations
- Tenant organizations
- Pro-choice groups
- Civic organizations
- Business and professional groups
- Student organizations
- Personal friends and family

In addition, all other endorsing organizations, from both the primary and general elections, which are not on the list above, should be asked to recruit volunteers.

Supporters who are members of organizations may know people in chapters, clubs or locals of other organizations located in other parts of the state, county or district where your candidate is not well known. They can be turned into effective volunteer recruiters.

If your campaign has constituency group coordinators, they should work closely with the volunteer coordinator to get recruiters and volunteers from their specific organizations.

Once potential volunteers and organizations have been identified, it is the volunteer coordinator's responsibility to make sure the people are asked for help. Once a volunteer is recruited from each group, they can be "deputized" as the volunteer recruiter for that organization. This is especially important because groups are more receptive to a request from one of their own members than from an outsider.

In the last two weeks of the campaign, your best source of volunteers is going to be the group of people who have contributed \$25 or less to the campaign. These people are invested, but let them know that now what you need more than anything else is people to do the work. They'll turn out for you.

## Volunteer Story:

*In one of my first campaigns, I had a great volunteer who worked nearly full time, and although he was quiet, I was very impressed with his dedication. Literally in the last week, as pressure was mounting, I finally asked him if he knew anyone else that could help-- he said, "Sure, I didn't know we needed more help, I'll ask my friends." Sure enough, the next day, three of his friends came on for the whole last week... I realized that they probably could have been helping the entire time. While you may not always be blessed with extra last minute help, you should always communicate with your volunteers early in the process. Don't assume they have been asked to help in every way they can already. People can always do more if they are asked, and most volunteers know other people who can help!*

Neal Kemkar  
Tennessee



Everyone can bring at least one more person into your campaign office. But they won't come if they aren't asked.

## Recruiting on the Internet

Volunteering doesn't mean showing up at a campaign office anymore. Today you can invite thousands of people to an event just by clicking a key on a computer.

Internet organizing is cheaper than phone banks or direct mail, and faster. Usually, a small percentage of an online community will take an action like send an e-mail upon being asked online. A smaller percentage will turn up at an event. If you are crowd-building for a rally, e-mails are a good first step and will get you people, but you won't want to rely on that alone without any phone call hard counts. A campaign must study and learn from its list. How many people are opening their e-mails? Are they RSVPing online? Are they signing one petition and not another? These questions must be dealt with separately, taking into account how motivated your volunteers are and how big the campaign is (i.e., is it for President or for state legislature?).



E-mails are just a first step towards increasing your volunteer pool.

Internet organizing allows you to build communities online. Women for, Labor for, Sportsmen for, Latinos for, Students for, e-Precinct Leaders for your candidate can all have a specific place to go on your Web site, and they can receive messages specific to their constituencies from your campaign. You might encourage a group to have its own listserv, so they can talk to each other more directly to organize fundraisers, distribute talking points or recruit volunteers.

What campaign activities can activists and volunteers do over the Internet?

- Messaging and talking points can be distributed
- Encourage supporters to write in the campaign blog
- Event mobilization
- Voter contact mobilizations for phone banks and canvassing
- Send an e-mail in support of an issue to the local paper
- Alert supporters to call in to a talk radio show
- Contribute money
- Forward e-mails
- Find information on how to get involved
- “Tell a friend” incentives
- Flyers can be downloaded for easy distribution



## CHAPTER FOUR

# Volunteer Math

### How to Figure Out How Many Volunteers You Need For a Given Project

Although budgeting volunteers will be easy for some projects, other projects require a greater understanding of what it takes to get the job done. A good example is voter contact, a part of the campaign that will require lots of volunteers.

For example, if the campaign task is to identify the candidate preference of 5,000 registered voters, the number of volunteers and the amount of call time required needs to be budgeted.

To do that you need to know:

- How many phones are available for the task? This could be based on how many are in your office or how many can be donated by law firms, labor unions, etc.
- What times will you run the phones? Usually phone banks are run in the evenings and on weekends; it's best to know what is customary in your area. Some operations don't call Friday nights because of the low number of contacts. Others don't call Sunday afternoons because of local sporting events.
- How many contacts can be attempted in an hour? Not all phone contacts take the same amount of time. A persuasion call takes more time than an ID or candidate preference call, which takes more time than a GOTV call. A well-run phone bank with a good supervisor can increase your number of contacts, but you should use numbers from an average night of a phone bank in order to be conservative.

## How to Calculate Volunteer Numbers

For this exercise, assume that your campaign had 10 phones available for the project; the phones operate three hours a night (6:00 – 9:00 p.m.) and average 22 attempted contacts per hour. Your task is to identify the candidate preference of 5,000 registered voters.

**STEP 1** – Determine the number of phone calls you are trying to complete, and the number of volunteers and the amount of call time required.

**STEP 2** – Multiply the number of contacts per hour times the number of hours per shift your phone bank will be in operation.

22 attempted contacts per hour x 3 hours per night = 66 calls per night per caller.

**STEP 3** – Multiply the number of contacts per caller, per shift times the number of phones at your phone bank.

66 calls per night per caller x 10 phones = 660 contacts per night by the phonebank.

**STEP 4** – Divide your overall goal by the number of contacts per night. To reach and identify 5,000 voters, you will need to place approximately 10,000 calls. No matter how good your volunteers are, lists are not perfect. Count on wrong numbers, disconnects, people not being home and those who will refuse to answer your questions.

10,000 calls divided by 660 contacts per night = 15.1 nights needed to make the calls.

**STEP 5** – Multiply the number of nights it will take to complete the project by the number of phones you have available.

15.1 nights x 10 phones = 151 phone shifts.

The .1 of a night could be “caught up” over the 15 nights of phoning or it may spill over into 16 nights of phoning if the phones aren’t fully occupied every night.

**STEP 6** – Recruit and schedule the volunteers based on the number of phone shifts listed above.



You may assume that the volunteer coordinator would need to recruit 151 volunteers to fill the 151 phone shifts. But you would be wrong. Just as it takes twice as many calls to get to the final number of completed calls made, you need to recruit twice as many volunteers to account for no shows.

*Always assume you can't count on everyone to show up.*

According to this formula, your volunteer coordinator would have to recruit 302 people for the phone shifts, but the actual number could be brought down by getting volunteers to sign up for more than one shift. However, the rule of thumb should be that if you have 10 phones available, recruit 20 callers.

Although this exercise uses phone-banking as an example, the same formula can be used for other volunteer projects such as canvassing, literature drops and mailings. The important thing to remember is that numbers do count and that this type of preparation ahead of time will always make the job easier.

## The 50 Percent Rule

Volunteers are not paid, so they are not as likely to follow through on their commitment because of other things in their life taking precedence (a kid's soccer game, a late night at the office, etc.) So, for planning purposes, expect to lose half of your volunteers per night. Therefore, twice as many volunteers should be recruited to perform a given task. This is the only way to ensure that an adequate number of volunteers will show up. Phoning them the night before helps the turnout, but you should still only expect half. Additional volunteer work should be prepared just in case everyone recruited shows up.

# Volunteer-Based Voter Contact Formulas

## PHONES

1. To calculate the number of households: Number of people on list x 0.6
2. To calculate the estimated number of phone matches: Number of households x 0.6
3. To determine how many contacts you will probably make: Number of phone matches x 0.07
4. Time your script and determine how many calls can be made in one hour (identify average rate of connection in one hour – normally one in every 10 calls).
5. Determine how many hours during the week you can make calls.
6. Multiply the number of contacts times the number of hours = one phone equivalent.
7. Divide the goal by the phone equivalent to determine the total number of phones needed.
8. Based on the number of phones, determine how many people you need to fill slots.
9. Recruit double the number of volunteers to fill slots.

### Example:

#### 2,500 Volunteer I.D. Calls

1.  $2,500 \times .6$  households = 1,500
2.  $1,500 \times .6$  phone match = 900
3.  $900 \times .70\%$  contact rate = 630 phone calls
4. ID Script with four questions (two candidates/two issues) = 12 per hour
5. Can call for 22 hours a week (Monday-Thursday/three hours, Saturday and Sunday five hours).
6. One phone can make 12 contacts every hour.
7. 22 hours to call x 12 contacts per hour = 264 contacts.
8. To complete the calls in 22 hours, you need to make 630 contacts.  
Divide  $630/264 = 2.38$  (3) phones going
9. For volunteers, you need three seats for 22 hours
10. You need to recruit at least six people for each seat for 22 hours (double the number of volunteers).

## **DOOR-TO-DOOR**

### **Example: 2,500 Doors to Knock**

2,500 x .6 households = 1500

Contact eight households per hour (will vary depending on neighborhood)

Canvass for 10 hours per week (Saturday six hours, Sunday four hours)

10 hours x eight contacts per hour = 80 contacts.

To complete the canvass in 10 hours, divide 1,500/80 = 18.75 (19)

You need 19 people-hours for all 10 hours.

You need to recruit at least 38 people.

## **VOTER CONTACT BUDGETING FORMULAS**

### **Vote-By-Mail**

Application call – eight per hour

Ballot collection – eight per hour

Reminder to send in ballot – 20 per hour

### **Early Vote**

Early vote reminder – 12 per hour

### **Door-to-Door**

Canvass – eight per hour

Knock-n-drop – 12 per hour

Lit drop – 30/50 hour depending on the geography

Petition collection – ten per hour/more during heavy traffic times

### **GOTV**

GOTV calls – 20 per hour

Rides-to-the-polls scheduling – eight to ten per hour

Giving rides to the polls – six per hour (variable)

Election Day fly squads – Depends on the terrain and time of day



## CHAPTER FIVE

# Training Your Volunteer Recruiters

Everyone involved in volunteer and activist recruiting should take a short training session on how to reach prospective volunteers. The training should include: a discussion of the volunteer recruitment plan, an explanation of volunteer needs, a discussion of the recruiting message for the campaign, and a recruitment role play.

When planning a volunteer recruiter training session, here is a sample agenda to follow:

- Thank volunteer recruiters.
- Give an overview of the campaign strategy. Recruiters should not be kept in the dark about what's going on in the campaign.
- Describe the campaign projects that will be undertaken.
- Role-play recruiting prospective volunteers.
- Distribute and review any materials or kits that have been developed for recruiters or volunteers.
- Give recruiters volunteer quotas.
- Have a question and answer period.

Before any project, training or recruiting session, it is important to make sure your volunteers have all of the relevant written materials they need. Even the most basic projects need some type of written instructions.

For example, a volunteer recruiter kit may include the following materials:

- Agenda for meeting.
- General campaign materials (brochure, button/sticker, issue papers).
- Campaign update materials (i.e., the weekly fax or a series of good press clips, a copy of a candidate speech to a particular group).

- Written description of project and instructions for recruiters.
- Step by step outline of project.
- List of volunteers to recruit from.
- A sample script to use for recruiting.
- Likely questions that recruiters will get from potential volunteers and the answers.
- A list of volunteer activities with dates and times when people are needed. Make sure there is a separate sheet for each day of each activity so that the name and phone numbers can be filled in and then given back to the volunteer coordinator.
- Volunteer pledge cards.

The campaign may want to hold more than one volunteer recruiter training session, and possibly separate sessions, for different types of recruiters. The training session should be held at a convenient location and should be followed by a social occasion or refreshments. The volunteer coordinator should be sure to make reminder calls to all recruiters the day before the training session.



## CHAPTER SIX

# Managing Volunteers

On a campaign, there is a place for everyone—no one should ever walk into headquarters and be told to come back on Saturday. Put people to work right away. Volunteers can be used in field operations, finance, administration and press. In fact, if you ask any director on your campaign, he or she will find a place to use a volunteer. And because the best volunteers are the long-term helpers, it is in your best interest to retain the volunteers you have.

## Pointers in Volunteer Management

Once a volunteer has been recruited, your campaign should keep the following pointers in mind. Some may seem obvious, but in the midst of a busy campaign nothing can be taken for granted.

**Thank Them** — Thank and thank them over and over again. The simplest way to make volunteers feel appreciated is to thank them.

**Be Clear** — When first assigning a volunteer to a project, make sure there are clear instructions and goals. If training is needed, it should be done at the start of the project. All projects, even the most basic ones (e.g., mailings, switchboard operation) should have written instructions.

**Be Realistic** — Each project assigned to a volunteer should be appropriate and specific. If your campaign is like every other campaign in the country, there is more work than can be done by a thousand volunteers. However, nothing burns out a volunteer more than a job that can't possibly be done during the time they are giving to the campaign. Divide projects into realistic pieces.

**Arm Your Volunteers** — Make sure volunteers have all the tools they need to finish their projects. A little thought beforehand will save time later when either the project doesn't get completed due to lack of proper information, or the volunteer is constantly asking questions. For some projects (like phone banking or canvassing), it may be necessary to put together a volunteer kit of materials and have it available in bulk.

**Keep Them Interested** — When assigning tasks to volunteers, make sure their skills and interests match the assignment. This is why it's important to give volunteers achievable tasks. If a volunteer can't finish a project with the proper training and directions, it could be time to move them to a less taxing or critical assignment.

**Accountability** — Make your volunteer jobs accountable. Creating a reporting system will let you assess a volunteer's performance in concrete, instead of anecdotal, terms. You can achieve this by making sure any lists or instructions are returned to the volunteer coordinator at the end of the project. And this will also make it easier to recognize each volunteer for his or her work.

**Dress for Success** — Although no Democratic campaign has a dress or conduct code, if a volunteer is dealing with the public, encourage him or her to be neat and courteous. For many campaign projects, comfortable dress is more important, but for some projects more effort is needed.

**Don't Overestimate Capacity** — Not every job on a campaign can be filled by a volunteer, even by the most competent individual. At some point, for the critical campaign positions, you must have paid staff (that way there is the ultimate accountability needed on a campaign – a paycheck.) You can fire staffers, but it's harder to fire volunteers.

**Work it Out** — Sometimes volunteers don't work out. But since it's hard to fire a volunteer, reassignment is the next best way to deal with the problem. Unless the volunteer is preventing the campaign from doing the work that needs to be done, you should never, ever tell a volunteer that his or her help is not needed. Every volunteer is a potential voter and there is always something that needs to be done on a campaign. Volunteer projects should be ranked in order of importance and skill level to help assign projects to lessable volunteers.

- **Recognize Good Work** — Recognition is the key to keeping volunteers in your organization. Remember, volunteers work for free and need some other small, inexpensive way of knowing that the campaign values their work. Volunteers should be thanked as they sign up to work and after they have put in some time.
- **Keep Them Informed** — Although volunteers are not a part of the day-to-day decision-making on the campaign, they should be kept aware of what's going on and their advice should be solicited where they have expertise.

And finally, it's amazing how many campaign staffers either ignore volunteers when they are in the office (leaving the volunteer coordinator as the sole link to the campaign) or treat volunteers rudely. The campaign staff should always, always be friendly to volunteers.

### Volunteer Story:

*My precinct is never a targeted swing precinct, but every year I walk it. I never have any literature to hand out because it is for the "targeted precincts." But I do send a letter out to all of the Democrats in my precinct, reminding them about the upcoming election. I visit all of the Democratic households, and I call all of the Democrats in my area to tell them to vote. I live in a precinct that has been voting Democrat for the 35 years that I've lived here, and I've heard there's no chance of it changing in at least the next ten years. But working the precincts is the way we elected President Kennedy.*

*I did this for years. But finally, in 2000, a volunteer caught me as I was walking out of the campaign office. She asked me what I was doing that day, and I told her my plan to walk my neighborhood. Instead, she gave me a different assignment: to register ten new voters. I did that, and then came back for a new task. In the next few weeks, I found more volunteers, and I helped to train precinct leaders in targeted precincts. If that volunteer hadn't caught me, I would not have realized the potential I had to help the campaign.*

*Leiv Blad  
California*

## Volunteer Recognition

Here are a few inexpensive or free ways your volunteer coordinator and campaign can recognize your volunteers' efforts and make them feel more plugged in to your campaign.

- Put regular volunteers on the campaign mailing and e-mail lists so they receive periodic updates on the progress of your campaign.
- Invite volunteers to non-fundraising events.
- Consider having a special button, hat or tee-shirt that identifies someone as a particularly active volunteer.
- Have periodic volunteer meetings at which new ads are shown to volunteers, or key staffers come and briefly update the group about campaign activities.
- Throw a recognition party or put together a volunteer night out at a local restaurant to thank volunteers. This is especially important before big projects like GOTV or after big projects like a day-long canvass.
- Some key volunteers should be invited to attend, not work, a fundraising event.
- Provide free refreshments at each volunteer project.
- Make sure your office is volunteer-friendly by having a volunteer sign-in area. Use calendars/charts to show progress and write down volunteer names on the calendar to show how many people have signed up and encourage new recruits to join them.
- Send your volunteers thank you notes after the election. This is something that few campaigns do well or at all. When a person has just worked weeks or months for free, the least the campaign can do is thank them. A short note soon after the race is over will make sure you can count on their support for the inevitable next campaign.

## How to Drive Away Free Help

Not only is it important to know why people volunteer for a campaign, it's also important to know why they leave. Your campaign's job isn't over once a volunteer has been recruited. The entire campaign needs to work to make sure volunteers stay productive, happy and interested in their work. Here are some reasons why people stop volunteering and ideas to help your campaign avoid the pitfalls.

- ***Burn out*** – Volunteers may be given too much responsibility too early, or you may be relying on the same volunteers for every project. Make sure that a volunteer has the appropriate training and skills to do the job right. It's tempting to give more work to your smartest, quickest volunteers — avoid that temptation.
- ***Exclusion*** – Often campaigns turn into an “us vs. them” situation – staff vs. volunteers, primary election volunteers vs. general election volunteers, volunteers who have been working together for years vs. new recruits. It's important to make sure campaign events include all staff and volunteers to help discourage cliques. Staff shouldn't congregate with each other and should make the effort to meet the new volunteers. Finally, your office should be set up to let volunteers have room to work without getting in the way.
- ***Can't win/can't lose*** – Volunteers don't want to waste their time if the campaign seems like a sure thing. Conversely, if it's a lost cause, why waste their time? The campaign should be presented to volunteers in a way to make them feel that they are making a difference. If you are ahead, great, but let them know how their work will assure victory, and that the campaign may not be successful without them. If you are behind, let them know that it's important to continue, that their help makes a difference. Goals reached and tasks completed can add up to a win. Use recent examples, and there are plenty of them, of races that have switched even 20 points in the final weeks.
- ***No growth*** – Volunteer work shouldn't always be tedious: there are enough interesting assignments to go around. Boring work should be spread around. No one person should spend the entire campaign stuffing envelopes or working the switchboard.
- ***No appreciation*** – Volunteers need to feel appreciated and recognized. Remember, a tired candidate who brushes aside a volunteer, or a staffer who never says thank you may lose a worker for the rest of the campaign.

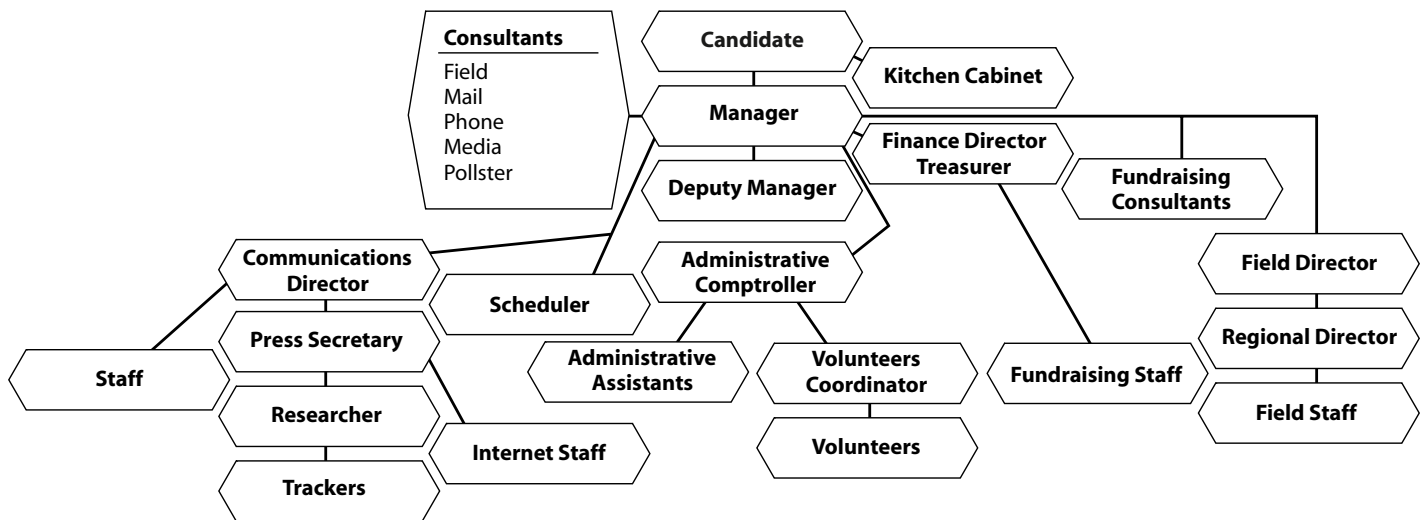
- **External opposition** – When a person volunteers, his or her entire family, in effect, is volunteering. Time spent on the campaign is taking time away from the family. If the family members do not want to work themselves, they should be at least made aware of what is going on in the campaign. Volunteers should be encouraged to bring their families to events/meetings and family members should be thanked at these events.
- **Internal conflict** – No one wants to work in a place that is full of tension. Although volunteers shouldn't be kept in the dark about important matters on a campaign, they don't need to be involved in every skirmish. Major internal conflicts should be waged in private.
- **Not Enough Fun** – One of the major reasons people want to keep volunteering for your campaign is because it is different from their day job (i.e., more fun). The campaign should be fun for the volunteers, staff and candidate. Otherwise, why bother volunteering?

### Volunteer Story:

*Just because volunteers are unpaid does not always mean that they are worth the trouble. Take the example of a young man who volunteered on a state legislative race with me. For four weeks, we all put up with his disruptive antics—his incessant chatter, his trash-talking the campaign strategy to other volunteers, and his constant clinging on the candidate. Despite our frustrations with him, we thought that free labor was too valuable to give up. We tried moving him around the campaign to different tasks, but finally it was too much to handle. The cost of having him around outweighed the benefits—he was an annoyance to everyone around him, and was distracting us from the task at hand. He had to be let go—but we did tell him that the help we would appreciate most was his vote.*

*Debbie Willhite  
Arkansas*

# Appendices



**Note:** This organizational chart should be used only as a guide. Larger campaigns will need to create additional staff positions, while smaller campaigns may be able to fill some of these positions with volunteers.

**Administrative Staff** — Responsible for ensuring that all aspects of the campaign are running smoothly.

**Communications Director** — Works with the Campaign Manager to devise an overall press plan, including long-range planning and event media, speechwriting and scheduling and advance.

**Comptroller** — Audits the campaign and regulates all finances.

**Field Organization** — Contacts, identifies and mobilizes voters for Election Day.

**Finance Director/Treasurer** — Writes and implements a finance plan that tracks money by method and date, and ensures that all legalities are met.

**Fundraising Consultant** — Supplements the on-staff fund-raising operation by organizing events with representatives of PACs or other interest groups with supportive constituencies.

**Fundraising Staff** — Sets fund-raising goals and figures out how to meet them, prepares materials to distribute to donors and plans fund-raising events.

**Kitchen Cabinet** — The candidate's team of personal advisors.

**Mail Consultant** — Produces persuasion mail to complement other paid media.

**Manager** — Makes all strategic and tactical decisions; oversees budget, cash flow and daily management of operations.

**Media Consultant** — Creates television and radio advertising based on information about persuadable voters, the candidate's record and that of his or her opponent.

**Pollster** — Conducts polls that will be used to target voters and develop efficient messages.

**Press Secretary** — In charge of day-to-day event planning and interaction with the media.

**Researcher** — Gathers information to be used in campaign materials, collects background on the candidate and their opponent and verifies accuracy of everything put out by the campaign.

**Scheduler** — Determines which invitations the candidate accepts by balancing the demands for the candidate's time.

**Trackers** — Staff dedicated to tracking press coverage of the candidate.

**Volunteer Coordinator** — Consults with all divisions of the campaign to best utilize volunteer resources.

**Volunteers** — Can be used in all aspects of the campaign.



# Glossary

**Blast e-mails** — E-mails sent to a campaign listserv, asking those who have expressed interest in the campaign or the campaign's ideals to volunteer time or money, or to update them on recent events.

**Campaign Math** — Formulas used to determine the number or amount of resources needed to run a specific campaign operation.

**Contact** — Each time a campaign worker actually gets in touch with a prospective voter.

**Crowd-Building** — Pre-arranging for volunteers to attend an event to ensure turnout.

**Endorsing Organizations** — An organization which has officially thrown its support to your candidate. These are good organizations to tap for volunteer resources because the membership typically has a high rate of support for your campaign, and members can bring friends and colleagues.

**Ride to the Polls Program** — The operation on Election Day in which a campaign ensures that everyone who wants to vote is able to. This entails taking senior citizens, the disabled and those who don't have other forms of transportation to polling places, usually via volunteers' vehicles.

**Volunteer Coordinator** — A campaign employee who oversees the volunteer operation, including recruitment, training and coordination with the paid aspects of the campaign.

**Volunteer Recruiter** — Ideally, anyone involved in the campaign. A volunteer recruiter finds volunteers for the campaign and matches their interests to tasks on the campaign staff.

**Volunteer Recruiter Kit** — A package of materials to help volunteer recruiters entice someone to volunteer for the campaign. It includes campaign information and materials, an outline of projects and a list of people to contact.

**Voter Identification Calls** — Phone calls made to voters inquiring about candidate preference, usually early in the campaign.

# Volunteers Coordination Checklist

- Find a great volunteer coordinator.
- Determine how many volunteers you need for each event or task.
- Assign each activity to twice as many volunteers as you need.
- Contact supportive organizations for lists of potential volunteers.
- Ask your volunteers to find more volunteers.
- Recruit over the Internet, using everyone's lists.
- Thank your volunteers and recognize them on a regular basis.

