Campaign Skills Trainer's Guide

Module 4
Voter Contact
Communicating Directly with Voters

المدارس الإقليمية لتنظيم الحملات

CAMPAIGN SCHOOLS

NATIONAL DEMOCRATIC INSTITUTE

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:

<u>Universal Principles of Voter Contact</u>

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

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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

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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

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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

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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

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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: **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

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

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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	Explain that, in general, the electorate can be divided into 3 main groups: **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 Ask participants: Why do we need to recognize these three categories? Why is it important? 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. 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.	TP	3	You can help illustrate the how the electorate can be divided by drawing some simple smiley faces on the flipchart: ☺ Your core supporters 😐 Undecided or persuadable voters ☹ Your opponent's supporters 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: ☺ 😐 ⊗

Steps	Description	Type	Min	Note to the Trainer
3	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. 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. 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).	PEE	15	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: - 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 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.

Steps	Description	Type	Min	Note to the Trainer
4	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. 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. 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. 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.	PEE + DBR	15	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. 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. 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. - 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

Steps	Description	Type	Min	Note to the Trainer
1	Explain that each voter contact technique listed has different impact on a voter. - 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. 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. 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. 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.**	TP + DBR	30	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. Universal Principles of Voter Contact personal voter contact = persuasive voter contact targeted voter contact = bigger return and better results hot techniques = ess money but more people needed door-to-door canvassing = highest impact voter contact method every campaign = a combination of hot and cold techniques

Steps	Description	Type	Min	Note to the Trainer
	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: • **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.			

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Steps	Description	Type	Min	Note to the Trainer
	• **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? Ask the participants what factors they would need to consider when assessing the effectiveness of a voter contact method. Elicit (or list and explain) the following: • Financial cost in terms of money or other material resources • Volunteers or human resources needed • Time and planning needed • Impact (hot or cold) • Efficiency (how many voters can be reached at one time)	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 | Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency | |---|---|---|---|---|---| | | | | | | | 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
	Ask the participants to return (or stay in) their groups. Ensure each group has a fresh piece of flipchart paper and a marker.

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. | | | |

Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency
Canvassing					
Community Meetings					
SMS					
Banners					

Note to the Trainer table:

Method	Financial Cost	Volunteers	Time and Planning	Impact	Efficiency
Canvassing					
Community Meetings					
SMS					
Banners					

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.

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.

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.

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.

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 *strategically*, and not just doing something because that's the way they've always done it.

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Steps	Description	Type	Min	Note to the Trainer
	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. Ensure the participants understand the task and give them 15 minutes to complete it. 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. 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.			13

Steps	Description	Type	Min	Note to the Trainer
3	Ask participants to return to (or remain in) their groups. Provide each with flipchart paper and markers. Instruct the groups to draw 2 columns on a piece of flipchart paper. 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. 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). Let the groups present their conclusions and ask them to explain why they have made those choices. Give 15 minutes for the group work and 10 minutes for presentations, debrief and discussion.	PEE + ANK	25	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. 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.

SECTION 3 – Canvassing – 55'

Steps	Description	Type	Min	Note to the Trainer
1	Introduce canvassing: 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. 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: 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: ✓ 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 Explain that there are two types of canvassing: 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	This section focuses more on how to actually conduct canvassing, because it is such a high impact activity in terms of voter contact. 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: **Chart 1** 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

Steps	Description	Type	Min	Note to the Trainer
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. For the purposes of our discussion in this training, we will focus on Persuasion/Electoral Canvassing. 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). 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? 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: ● 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			As you are going through what campaign needs to conduct canvassing activities, you can have following notes written on the flipchart in advance: **Chart 2** FOR CANVASSING YOU WILL NEED: 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

Steps	Description	Type	Min	Note to the Trainer
	• 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) Make the following points as well: • 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	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? 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.	TP + DBR	10	Write short instructions for the characteristics of a good canvassing script on the flipchart: **Chart 1** CANVASSING SCRIPTS SHOULD: 5. Be short 6. Be clear 7. Allow for two-way communication 8. Begin and end with the name of the party or candidate

Steps	Description	Type	Min	Note to the Trainer
	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: • 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 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: • 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?			During the discussion on how to write a canvassing script, use the following structure to help guide participants: **Chart 2** 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** 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.

Steps	Description	Type	Min	Note to the Trainer
	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): 1. **Greeting** – be polite 2. **Statement of Identity** – who are we? 3. **Statement of Purpose** – why are we here? 4. **Question 1** – ask the voter a question about the election, their concerns or priorities to begin a conversation 5. **Message** – connect the party or candidate's message to the voter's concerns 6. **Question 2** – ask the voter another question about the election, whether or how they plan to vote, or what's important to them 7. **Message** – reinforce the party or candidate's message 8. **Anything Else?** – ask the voter whether there are any other points they would like to make Identity, Message and Contact 9. **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	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. 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.	ANK	40	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.

Steps	Description	Type	Min	Note to the Trainer
	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	Introduce the concept of recording voter contact results and explain its importance: 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. 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. 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. 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. Without spending too much time on each, walk through the information fields on the card and explain why these are included.	TP + DBR	20	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. Have the sample of the voter contact card prepared on the flipchart in advance: **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:** **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 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

Steps	Description	Type	Min	Note to the Trainer
	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. Ask them to explain their ideas. Modify the Sample Voter Contact Card to integrate their suggestions. 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.			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. 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. 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. 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.

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

Steps	Description	Type	Min	Note to the Trainer
1	Introduce Get Out the Vote and explain what the term means: 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. 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. 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. 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. 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: • Door-to-door canvass • Phone banks • SMS and mobile phone messaging • Persuasion literature drops	TP + DBR	15	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). 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. 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.

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	Ask participants to return to (or remain in) their groups. Provide each with a piece of flipchart paper and a marker. 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: • 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? Instruct the groups to write down their ideas on the flipchart paper. Give 10 minutes for this activity.	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.

Steps	Description	Type	Min	Note to the Trainer
	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. 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.		25	

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

Steps	Description	Type	Min	Note to the Trainer
1	Introduce Get Out the Vote and explain what the term means: 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. 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. 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. 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. 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: ● Door-to-door canvass ● Phone banks ● SMS and mobile phone messaging ● Persuasion literature drops	TP + DBR	15	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). 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. 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.

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. 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.			27

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	Introduce the concept of building a voter contact plan by explaining the following to participants: 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. 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.) 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): ● 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 The campaign is also targeting the ● 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	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. 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. 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.

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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	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. 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. 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. 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.	ANK + CLL	50	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. 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. 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. 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.

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

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the concept of building a voter contact plan by explaining the following to participants: 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. 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. Explain each of the columns: • **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. Ask participants if they fully understand the topics in each of the columns and the purpose of the table itself.	TP + DBR	15	Draw the following table on the flipchart in advance: | Method	Target Voters	How Many	When	Resources | |---|---|---|---|---| | | | | | | | | | | | |

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Steps	Description	Type	Min	Note to the Trainer
2	Ask participants to return to (or remain in) their groups. Provide each group with flipchart paper and markers. 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.) 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. Give the groups 10 minutes to complete their plans and provide allow 5 minutes for the groups to present them and to debrief them.	ANK + CLL	15	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.

CONCLUSION – 5'

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1	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. ● 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	

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

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Social Media Campaign	First time voters	40,000	1 (40,000 ÷ 120 = 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

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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

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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