

# Campaign Skills Trainer's Guide

## Module 9

### Campaign Planning *Setting Goals, Outlining Strategies and Defining Tasks*





# CAMPAIGN SKILLS TRAINER'S GUIDE

## MODULE 9: CAMPAIGN PLANNING

### *Setting Goals, Outlining Strategies and Defining Tasks*

#### **SESSION OVERVIEW:**

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

#### **SECTIONS:**

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

#### **LEARNING OBJECTIVES:**

- Skills and tools for campaign planning and managing resources

**TIME:** 160 minutes

#### **MATERIALS:**

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

#### **HANDOUTS:**

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

#### **PREPARATION:**

Write on the flipchart in advance:

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

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

KEY FOR THE TYPE OF ACTIVITIES INCLUDED IN THIS WORKSHOP:

TP – Trainer’s Presentation

PEE – Participants’ Experiences or Exercises

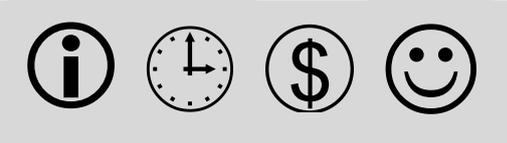
DBR – Facilitated Discussions, Brainstorming and Reflection

CLL – Conclusions and Lessons Learned

ANK – Application of New Knowledge

## TRAINING ACTIVITIES

### SECTION 1 – Campaign Planning: Introduction – 10’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Introduce the session and review learning objectives.</p>	TP	3	<p>A number of the elements of a campaign planning are fully developed and explained in other modules from NDI’s MENA Campaign School Curriculum including: message, fundraising, media and communication and voter contact. This session will focus on the remaining elements of a campaign plan (goal, timeline and action plan, budget, and campaign team) and two other topics relevant for managing resources: Data and List Management and Volunteer Recruitment and Management.</p>
2	<p>Introduction to Campaign Planning:</p> <p>Remember, every campaign has four main resources:</p> <ul style="list-style-type: none"> <li>- People</li> <li>- Money</li> <li>- Time</li> <li>- Information</li> </ul> <div style="text-align: center; margin: 10px 0;">  </div> <p><i>Campaign planning is about managing all of these effectively so that no matter how resource-rich or resource-poor your campaign is, you can maximize your impact and potential to win.</i></p> <p><i>A campaign plan is a written document that charts what you are going to achieve in your electoral campaign and how you are going to achieve it. It is a roadmap that will guide you and your team through the busy and challenging days of the campaign and election, help make sure you have all the resources you need and ensure you are conducting the types of activities that will get you to your goal.</i></p>	TP	7	<div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p><u>CAMPAIGN RESOURCES:</u></p> <p><b>PEOPLE    MONEY    TIME    INFORMATION</b></p> </div> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p><u>CAMPAIGN PLAN IS A WRITTEN DOCUMENT THAT DEFINES</u></p> <ul style="list-style-type: none"> <li>- WHAT you are going to achieve</li> <li>- HOW you are going to achieve it</li> </ul> </div> <div style="border: 1px solid black; padding: 10px;"> <p><u>ELEMENTS OF A CAMPAIGN PLAN:</u></p> <ul style="list-style-type: none"> <li>- GOAL</li> <li>- TIMELINE AND ACTION PLAN</li> <li>- BUDGET AND FUNDRAISING</li> <li>- MESSAGE</li> <li>- MEDIA AND COMMUNICATION</li> <li>- CAMPAIGN TEAM</li> <li>- VOTER CONTACT</li> </ul> </div>

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

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

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

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

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

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

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

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

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

Steps	Description	Type	Min	Note to the Trainer
1	Introduce the section:	TP	5	
	<p><i>As important as how you manage your time and material resources are the people you recruit to bring energy, ability and focus to your campaign. This is your campaign team, which can consist of both paid (staff) and unpaid (volunteers) members, depending on what you can afford and what you want to achieve.</i></p> <p><i>Every campaign team staffing starts with recruiting a campaign manager (because he or she oversees the implementation of the campaign plan, ensures that all activities run smoothly on a daily basis, and that the campaign is achieving its goals; the Campaign Manager also makes sure the candidate or candidates are holding up under the strain and demands of the campaign) and from there works out other roles depending on the party’s electoral ambitions and the local political landscape.</i></p> <p><i>Rural districts, for example, often require a talented Field Organizer, dedicated Volunteer Coordinator, and numerous volunteers to reach voters in a large geographical area. Campaigns in more urban areas are more likely to use electronic and print communications to contact voters and may therefore bring in a Communications Officer first.</i></p> <p><i>Whatever your campaign team looks like, it is important that all key roles are filled, that they are filled by individuals who will take responsibility for their work, and that everyone has a clear job description and knows what his or her responsibilities are.</i></p>			
	<p>Organizing a campaign team can be done in 5 steps:</p> <ol style="list-style-type: none"> <li><b>1. Identify activities</b> – Review your communication plan, voter contact plan and timeline to identify all the activities you need to accomplish.</li> <li><b>2. Identify Functions and Skills</b> – Identify the skills required to achieve what you have set out in your planning.</li> <li><b>3. Write Job Descriptions</b> – Write job descriptions that tie skills and responsibilities to specific positions within the campaign.</li> <li><b>4. Recruit</b> – Recruit staff and volunteers, based on the skills you need and the job descriptions you have written.</li> <li><b>5. Assign Roles</b> – Assign specific roles to team members and volunteers.</li> </ol>	TP	5	<div style="border: 1px solid black; padding: 10px;"> <p><b>5 STEPS FOR ORGANIZING A CAMPAIGN TEAM:</b></p> <ul style="list-style-type: none"> <li>- Identify activities</li> <li>- Identify Functions and Skills</li> <li>- Write Job Descriptions</li> <li>- Recruit</li> <li>- Assign Roles</li> </ul> </div>

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

## SECTION 2 – Data and List Management – 10’

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

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

## SECTION 3 – Volunteer Recruitment and Management – 34’

Steps	Description	Type	Min	Note to the Trainer
1	<p>Lead a quick brainstorm on the term “volunteerism.” Ask participants what it means to volunteer. Write some of their answers on the flipchart and guide the discussion towards the following answer:</p> <p>Volunteerism (or volunteering) is work done freely and without compensation to benefit one’s community</p> <p>Ask the participants why people volunteer and why they might volunteer for a political campaign. Elicit the following answers:</p> <ul style="list-style-type: none"> <li>• <i>They believe in or are somehow connected to the issues or ideas the party or candidate represents.</i></li> <li>• <i>They are motivated by a desire to learn new skills or get work experience.</i></li> <li>• <i>They hope they will get a paid job from volunteering.</i></li> <li>• <i>Social reasons – to meet new people, to feel more connected to the community or to do something meaningful and enjoyable.</i></li> <li>• <i>They are seeking recognition and acknowledgement for their abilities.</i></li> </ul> <p>Then ask where they can find volunteers, and elicit following:</p> <ol style="list-style-type: none"> <li>1. Family and friends</li> <li>2. Local schools and universities</li> <li>3. Local civic or religious organizations</li> <li>4. Supporters who can’t give money</li> </ol>	DBR + TP	10	<p>Prepare the following flipcharts in advance:</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Volunteer is work done freely and without compensation to benefit one’s community</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;"><u>Reasons to volunteer:</u></p> <p style="text-align: center;">Shared belief New knowledge Expectations Socializing Recognition</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"><u>Where are volunteers?</u></p> <p style="text-align: center;">Family and friends Local schools and universities Local civic or religious organizations Among supporters who can’t give money</p> </div> <p>Participants may resist the concept of volunteerism or express skepticism that this could work in their areas. If this happens, guide them back to the discussion on why people volunteer and ask whether any of these would be motivating reasons for members of their community, or what other ways they might encourage people to volunteer.</p>
	<p>The next question is: How? How can a campaign recruit as many volunteers as they need to execute a campaign? After a short brainstorming share any of the following points, if they have not already been made:</p> <p><i>Make it a regular practice for the candidate, campaign staff and volunteers to ask people if they would like to help the campaign by volunteering.</i></p> <p><i>Use the voter contact efforts and events that the campaign is organizing as opportunities to recruit volunteers as well.</i></p>			

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

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

## CONCLUSION – 1'

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

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

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

## Campaign Budget Template

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

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

## Campaign Timeline Template

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

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

<b>Seven Weeks Before Campaign</b>				
<b>Eight Weeks Before Campaign</b>				
<b>Nine Weeks Before Campaign</b>				
<b>Ten Weeks Before Campaign</b>				

## Campaign Team Job Descriptions

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

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

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

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

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

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

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

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

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

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

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