About the National Democratic Institute for International Affairs (NDI)

The National Democratic Institute for International Affairs (NDI) is a nonprofit organization working to strengthen and expand democracy worldwide. Calling on a global network of volunteer experts, NDI provides practical assistance to civic and political leaders advancing democratic values, practices and institutions. NDI works with democrats in every region of the world to build political and civic organizations, safeguard elections, and to promote citizen participation, openness and accountability in government.

NDI has worked in Indonesia since 1996, when it supported domestic efforts to monitor the May 1997 parliamentary elections. Since then NDI programming has worked to strengthen civil society and political parties; to assist the legislature in undertaking democratic reforms; to provide assistance to regional governing bodies as they implement decentralization policies; to enhance the ability of legislators and others to undertake constitutional and electoral reform; and to encourage civilian control over the military.

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Introduction

This manual is based on a Training of Trainers workshop “Preparing for Success: Tools, Methods and Strategies for Electoral Campaigns” delivered in Jakarta, Indonesia in September-October 2003. The workshop was conceived as part of NDI Indonesia Women’s Political Participation Program support for the Indonesian Women’s Political Caucus (KPPI: Kaukus Perempuan Politik Indonesia), a cross-party national organization that NDI has been working with since its inception. This training was the second in a series conducted with KPPI in 2003 to support women in political parties seeking nomination in the April 2004 elections.

The workshop trained 24 women, 12 from KPPI and 12 from the women’s wings of political parties, both nationally and regionally. As in the past, the workshop was designed to both share the practical tools needed for successful campaigning but also how to train others. Participants teamed up national and regionally by party to provide multi-party follow-up trainings in five provinces: Central Java, West Java, East Kalimantan, North Sulawesi and Papua. At writing, additional trainings had also been conducted and were planned in other provinces across Indonesia.

NDI Indonesia would specifically like to thank Lisanne Baumholz (Oleanna Facilitation, Training and Research, Canada) who produced the manual and conducted the Training of Trainers workshop in Jakarta and Shannon O’Connell (NDI Northern Ireland) who produced the core material on campaigning techniques. Thanks also go to Merita Gidarjati (NDI Indonesia Women’s Participation Program) who played a key role in the workshop’s development and implementation. We thank KPPI (board members, training unit and staff) for their help in the development of the training and, perhaps more importantly, for their on-going support and advocacy on behalf of women political activists in Indonesia. Most of all, NDI would like to thank the participants of the Training of Trainers, for the enthusiasm with which they absorbed the material and then delivered it to other women across the country.

Being in politics is tough. Being a woman can also be tough. Being a woman in politics is really tough. Women, in Indonesia and around the world, who embrace politics are doing some of the most important work imaginable. Women in politics are changing their neighborhoods, their communities and their countries to make the day-to-day lives of women and men better. Women in Indonesia, and around the world, are walking the tough road of politics, to make the way smoother for the hundreds and thousands and millions of women who will follow.

Politics will likely always be tough. Being a woman will also likely always be tough. But perhaps being a woman in politics will be a little less tough because of the work women – in Indonesia and around the world - are doing in politics today. And for that, political party women, we thank you.

Stephanie Lynn
Program Director
Political Party and Women’s Participation Programs
NDI Indonesia
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Who should use this manual?
This manual is intended for use by people who have some experience in participatory training. Read the session and training tips sections of the manual to assess your comfort level with the material and the mode of delivery. Since some sessions are quite technical, make sure you are sufficiently prepared to explain the material without referring to the manual before delivering a session.

Who should participate in the workshop?
The target groups for the workshop are party members, candidates or volunteers who will be active in a election campaign. It can be used for people who will be managing campaigns as well for people who are active at other levels. In all cases, the *Pre-Workshop Participant Assessment* (see next section) should be carried out prior to beginning the workshop.

Some of the material is specifically designed for women party members or candidates, specifically Session 15, the Pre-Workshop Participant Assessment and the Campaign Skills Quiz. However, all these materials can be easily adapted for use with other groups. Keeping the gender focus can help other people in political parties think more deeply about women's participation in their context.

All the material can be used in different countries or other local contexts.

Because of the participatory nature of the workshop, the ideal number of participants is 15-25 participants. Larger numbers will make it difficult to deliver the sessions in the time indicated, and will affect the dynamics of the group.

How long is the workshop?
The workshop is a three-day workshop with 7 hours of training each day. The workshop agenda included in Session 1 uses a schedule with a 1.5 hour lunch break and two 30 minute breaks. This can be modified to suit local circumstances and participant needs.

How is the Manual organized?
The manual is organized in the actual sequence of the workshop as follows:

Day (1,2,3)

Daily Theme

List of the sessions for that day

Session Title

Session Objective(s)

Time (duration of the session)

Materials (type of material indicated by symbols below and listed)

✍ Flipchart prepared in advance

⦿ Supplies needed for the session

🗋 Handout

📼 Audio-visual equipment

Process (step-by-step instructions and methodology for the session)

Trainer Tips (additional information that will help trainers implement the session)

Please Note:

- ***Basic materials*** such as flipcharts and flipchart paper, markers, whiteboard, etc. are not listed in the sessions as these should be available in good supply through the workshop.
- ***Prepared Flipcharts:*** Note that material that is presented on flipchart is listed here. In addition, often material that is listed under Handouts should also be presented on flipchart – when this is the case, these are indicated in the Process sections of the session. Print in clear and large letters on all flipcharts and use a variety of colors to highlight key points.
- ***Handouts*** should be distributed as indicated in the Process sections of each session. A binder can be provided to participants at the beginning of the workshop for easy filing as they are distributed.

How is evaluation carried out?

Formal evaluation is carried out on a daily basis by teams of participants (see Session 1) and through a final written evaluation (Session 16). The effectiveness of the transfer of skills and knowledge is also assessed through the Campaign Skills Quiz, used to compare with results of Pre-Workshop Participant Assessments.

How should the training room be set up?

Ideally, the room should be large enough to have participants sit in a circle with space around to break into small groups. There should be adequate wall space to post flipcharts as they are completed in the sessions as well as to keep a number of flipcharts from prior sessions posted (to remind participants of previously completed material). Whiteboards on wheels are very useful if available.

What is not in this Manual?

The manual focuses on the programming aspects of designing and delivering workshops. It does not deal with issues such as participant selection and logistics planning,

There are no energizers included but the assumption is that there will be energizers as needed when participants need to renew themselves. These can be done by the trainer or the participants themselves.

Pre-Workshop Participant Assessment

The following assessment questionnaire should be completed by participants before the workshop begins. It can be sent to participants ahead of time or given to them to complete when they first arrive for the workshop.

This information will help you assess participants' levels of skills and knowledge before the workshop and give you a tool to assess the effectiveness of skills/knowledge transfer during the workshop when you administer the Campaign Skills Quiz at the end. It also will help participants get mentally prepared for the training.

Participant Name: ____

1. Please list what kind of things are important to remember when developing a campaign plan.
   a) ____
   b) Don't know

2. What is a campaign message?
   a) ____
   b) Don't know

3. Please list important things to remember when preparing a speech to give to a group of voters.
   a) ____
   b) Don't know

4. What methods can you use to convince voters to vote for you during the campaign?
   a) ____
   b) Don't know

5. How do women get nominated in your political party?
   a) ____
   b) Don't know

6. If you were assisting a candidate running for office, what kind of advice you would give her as she developed her campaign?
   a) ____
   b) Don't know

7. What are the important community issues in your district?
   a) ____
   b) Don't know

8. What would you suggest that a woman candidate emphasize during a speech to convince voters to choose her as a candidate?
   a) ____
   b) Don't know

9. What suggestions would you give to a women candidate preparing to make a speech to a group of voters?
   a) ____
   b) Don't know

10. If you were giving information to a candidate about the election law, what would you would tell her to remember?
   a) ____
   b) Don't know

11. What methods should a woman candidate use to convince voters during the campaign?
   a) ____
   b) Don't know

DAY ONE

Theme:

Campaign Basics

Sessions:

Opening

Elements of Campaigning

First Steps in Preparation: Research

Electorate Profile

Targeting

Components of Survey Canvassing

Session 1
Opening

Objectives:
- Orientation to workshop objectives and process
- Participants and facilitator(s) learn more about each other's backgrounds and expectations for the workshop
- Clarifying ground rules for the workshop
- Explanation of the evaluation process

Time:
90 minutes

Materials:
- ✍ Overall workshop objectives
- ✍ Day One agenda
- ⦿ Paper hats (purchased party hats or 6" bands of sturdy paper glued to fit around head), colored markers or crayons
- 🗋 Workshop Agenda, Daily Evaluation Team Worksheet

Process:

Part 1 (15 minutes)
1. Review the flip chart with overall workshop objectives. Explain that:
   - The workshop aims to give participants knowledge and skills that will help them provide leadership in their parties in terms of developing effective campaigns as well as help them cope as women party members facing gender barriers within and outside their respective parties.
   - The approaches to campaigning that will be explored in this workshop are based on NDI's extensive and long-standing experience with electoral campaigns in many different countries, including developing countries. Acknowledge that every country has its own history and context in carrying out electoral campaigns. Consequently, workshop material will be presented in a way that will encourage adaptation to the local context.
   - The training methodology for the workshop is participatory, meaning participants have many opportunities to apply new knowledge and skills that they learn as well as to contribute their own knowledge, skills and experiences.
   - Distribute the Workshop Agenda, if it has not already been provided in the workshop kit.

Part 2 (45 minutes)

1. *"The Hats We Wear" icebreaker and introduction exercise*: Distribute paper hats and a marker/crayon to each participant.

2. Explain that we all perform many roles in our lives ("wear different hats") – these roles are both personal and professional. Women are often particularly conscious of (or are made conscious of!) their multiple roles with respect to their family and professional responsibilities. Ask participants to write on their "hats" all the roles they currently perform (e.g., work role, party role, nuclear family role, extended family role, etc.)

3. Structured round – have each participant:
   - say her name, party and where she lives (if relevant)
   - read out all the roles she has written on her hat
   - say one thing she most wants to learn by the end of this workshop – record these on flipchart

4. Debrief:
   - Reflect on the number of roles carried out by participants – we usually don't take the time to acknowledge how much we all do or how much experience we have from carrying out all these roles. Draw participants' attention to any roles they play that are directly or indirectly related to campaigning.
   - Explain that Session 15 will allow participants to explore some of the tensions that can be experienced as they try to fulfill all the expectations associated with their many roles. Acknowledge that everyone in the room has had to put aside some of their responsibilities in order to attend this workshop.
   - Related participants' expectations to the workshop objectives. If there are any expectations that emerged that clearly cannot be met through the workshop objectives, be clear that these fall outside of the parameters of this workshop.

Part 3 (15 minutes)

1. *Ground rules*: Discuss the ground rules for the workshop with participants. Minimally, these should include expectations about promptness, timing, what to do if someone comes late or misses sessions, not interrupting when someone else is speaking and the use of cellular telephones. (Alternatively, basic ground rules can be presented on a prepared flipchart and participants can be asked whether they agree or disagree with these.) Record agreed-upon ground rules on a flipchart and post it in a prominent place for the duration of the workshop.

Part 4 (10 minutes)

1. *Evaluation process*: Distribute the Daily Evaluation Team Worksheet and explain that the participants will be divided into 3 teams, each of which will be responsible for meeting at the end of their assigned day and reporting the results of their discussion to whole group on the following morning. The Worksheet should be completed by each team for their assigned day and submitted as documentation. Participants can be assigned to their Evaluation Teams ahead of time or at this point. (If you choose to pre-assign the Evaluation teams, post the groups on prepared flipchart paper.) Explain that there will also be final written evaluations during the last session of the workshop.

Part 5 (5 minutes)

1. Review posted Day One agenda and clarify if necessary.

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Trainer Tips

1. *Objectives review*
   - Make sure you understand how each session relates to one or more of the overall workshop objectives.

2. *Introductions and expectations*
   - Some participants may not find it easy to make their hats – as adults, they might not be used to opportunities to "play". Circulate among participants and brainstorm their roles individually to encourage them if necessary.
   - Getting participants to "play" helps build trust and level differences.
   - Participants will probably discover common roles they share with participants with participants who come from different backgrounds or who they don't know yet – this will help build cohesion for the group during the workshop.
   - Having something about themselves written in advance will help shy or quieter participants speak more easily.
   - Be clear from the beginning with participants if their stated expectations are not going to be met through the objectives of the workshop – ask them if they have any other expectations that might be met through the workshop objectives.
   - Review participants' expectations during a break and make sure you understand which session(s) will contribute to meeting their expectations. Think about how you can revise any session process to better meet participant expectations if possible.
   - Remember that the time taken to establish the atmosphere at the beginning of the workshop is very important – do not rush participants through their introductions and expectations.

3. *Ground rules*
   - It is the trainer's responsibility to ensure that the group respects the ground rules that have been agreed upon – post the ground rules in a prominent place and don't forget to remind participants about the rules when they "break" them. If a rule starts to be consistently broken by one or more participants, revisit the rules with the whole group to discuss the rule in question and why participants are finding it difficult to stick to it.
   - In a mixed party group, it is important to include confidentiality as a ground rule – information shared during the workshop should not be shared outside the group.

4. *Evaluation teams*
   - This is a good opportunity to group participants who don't know each other well or who come from different parties or parts of the country so they have an opportunity to work together.

5. *Agenda review*
   - For following days, always have the day's agenda prepared on a flip chart and review with participants following the Daily Evaluation Team report.

✍

Overall Workshop Objectives

1. To increase the number of women candidates elected by developing their capacity to implement effective electoral campaigns.

2. To increase the capacity (skills and knowledge) of women members of political parties to participate in or carry out campaigns as candidates or party members.

3. To provide tools that increase women's participation in political parties.

Workshop Agenda

PREPARING FOR SUCCESS: TOOLS, METHODS AND STRATEGIES FOR ELECTORAL CAMPAIGNS				
Day	***Daily Theme***	***Time***		***Session Topic***
1	Campaigning basics	8:30 - 10:00	1	Opening: • Overall objectives • Participant introductions and expectations (activity) • Workshop process
		10:00 - 10:30		BREAK
		10:30 - 11:30	2	Elements of Campaigning
		11:30 - 12:00	3	First Steps in Preparation: Research
		12:00 - 12:30	4	Electorate Profile
		12:30 - 14:00		LUNCH
		14:00 - 15:00	4	Electorate Profile
		15:00 - 15:30	5	Targeting
		15:30 - 16:00		BREAK
		16:00 - 16:30	5	Targeting
		16:30 - 18:00	6	Components of Survey Canvassing
2	Campaign context and how to use it	8:30 - 9:00		Report from Day 1 Evaluation Team
		9:00 - 10:00	7	Survey Canvassing Skills
		10:00 - 10:30		BREAK
		10:30 - 11:00	8	Next Steps in Preparation: Analysis and Message Development
		12:30 - 14:00		LUNCH
		14:00 - 15:30	9	Vote Count
		15:30 - 16:00		BREAK
		16:00 - 18:00	10	Message Development
3	Going public with the campaign	8:30 - 9:00		Report from Day 2 Evaluation Team
		9:00 - 10:00	11	Strategies for Working with Media
		10:00 - 10:30		BREAK
		10:30 - 11:30	11	Strategies for Working with Media
		11:30 - 12:30	12	Planning and Implementing Outreach Activities
		12:30 - 14:00		LUNCH
		14:00 - 15:00	13	Elements of a Campaign Plan
		15:00 - 15:30	14	Building a Campaign Team
		15:30 - 16:00		BREAK
		16:00 - 17:30	15	Personal Coping Skills
		17:30 - 18:00	16	Final Evaluation and Closing

Daily Evaluation Team Worksheet

1. According to your team, what was learned today?

2. What did you think about the process that was used?

3. What did you think was the most useful from today's sessions?

4. What was the least useful?

5. Other comments

Session 2
Elements of Campaigning

Objectives:

- Introducing the basic elements and concepts (main resources, phases of campaigns, audience and types of voters) involved in electoral campaigns
- Assessing participants' knowledge and experience of campaigns

Time:
60 minutes

Materials:

✍ Flow of Campaign Training Material
🗋 Four Phases of Campaigns (2-1), Three Kinds of Voters (2-2)

Process:

Part 1: Three Key Resources (25 minutes)

1. Ask participants: "What kinds of campaigns, in general, can you think of?" Write responses on a flipchart. Group the responses into these categories (which might have already come out in responses):
   - Marketing campaigns
   - Advocacy campaigns
   - Educational campaigns
   - Fundraising campaigns
   - Electoral campaigns
2. Ask participants: "What is the ultimate objective for each of these categories of campaigns?" Give them any responses they do not come up with:
   - Marketing → individual/organizational profit (in the form of money)
   - Advocacy → policy change (governmental/organizational)
   - Educational → increased knowledge/consciousness
   - Fundraising → financial and other resources to support organizational missions
   - Electoral → votes
3. Explain to participants that although each of these categories of campaigns have different objectives, they share many characteristics. Ask participants if they have ever actively participated in any of these kinds of campaigns, and if so, what kind of things they did. Write the responses on a flipchart and note the range of experience that already exists in the group.
4. Tell participants that all campaigns, no matter what their ultimate objective or where they are carried out, require three key resources. Ask participants what they think these are and write their responses on a flipchart. If they haven't already included these, tell them the three key resources are: **people, money and time**.
5. Explain that whether a large or small party/a popular or less popular candidate, all parties/candidates operate with constraints of:
   - the number of people (paid and/or unpaid) they are able to mobilize for their campaign activities
   - the amount of money they have available for use in campaign activities and within election law guidelines
   - the time limits that exist and are the same for all parties/candidates – all electoral campaign activities have the same deadline: election day!

6. More money may mean a party/candidate can do more (have more paid campaign staff, buy advertising or other promotional materials) but more people may mean a party/candidate can reach more potential voters directly and do more with less time. But the key to a successful campaign is how efficiently a party/candidate can use limited human resources, money and time. The focus of this workshop is to help participants develop skills and learn methods to utilize these limited resources efficiently and with maximum effectiveness in order to get votes on election day.

   Women candidates should not feel discouraged if they have fewer financial resources available compared to male candidates, as is commonly the case. Rather, they should pay attention to how effectively they can build and mobilize a base of support (human resources) to compensate for this.

Part 2: Four Phases of Effective Campaigns (15 minutes)

1. Review the Four Phases of Effective Campaigns (H/O 2-1): Preparation, Planning, Organizing and Implementing. Each of these phases has a number of activities that should be carried out in order to make the overall campaign effective. The sequence of these activities is important, as activities carried in one phase support the effectiveness of activities in a subsequent phase. Many of the activities in the Preparation Phase in particular are carried out by parties/candidates long before an election is called, especially in long-standing democracies. Although some of these activities may seem time-consuming, they have been proven effective not only in the short-term for an upcoming election but also in the long-term as a party/candidate builds voter support over time.

2. Ask participants what kinds of activities they have previously carried out for each phase and record on flipchart. Post for reference during subsequent sessions.

3. Review the Flow of Campaign Training Material. Explain that this workshop focuses on the Preparation and Planning Phases only, and that sessions are organized so that participants will become increasingly focused on specific strategies to help them be effective in getting voters to choose them on election day.

Part 3: Who is Your Audience? and Types of Voters (20 minutes)

1. Review Three Kinds of Voters (2-2). There are three categories of people who form the audience for an electoral campaign: Your Base Voters, Persuadable Voters and your Opponent's Base Voters. Before we start to prepare our campaign, it is essential that we understand who falls into each of these categories.

2. Review the definitions of the Three Kinds of Voters (2-2):
   - Your base voters are those who are already planning to support your party/candidate and will not change their minds before the election.
   - Persuadable voters are those who have not decided who they will vote for yet and may decide to vote for your party/candidate based on how successfully your campaign message is communicated to them.
   - Your opponent's base voters are those who are already planning to support your opponent and will not change their minds before the election.

3. Good preparation and research will help us learn exactly which voters fall into which category, and help us to develop strategies that effectively reach the voters we need to reach: our base voters and persuadable voters.

☑

Trainer Tips

1. *Three Main Resources*
   - This is an opportunity to find out what level of understanding and experience participants have in terms of campaigning. Acknowledge that experience from other kinds of campaigns can be applied to electoral campaigning.
   - The key point to emphasize is that being aware of our constraints will help us plan effectively and realistically. Not being aware of our constraints will mean wasting precious people's efforts, money and time.

2. *Four Phases of Effective Campaigns*
   - Emphasize the importance of the sequence of activities during a campaign and the sequence of the sessions in the workshop. Remind participants during subsequent sessions of how the method they are learning builds on information they learned through earlier sessions – the reason the methods being conveyed have proven effective is based on the whole set of activities, not just one.

3. *Who is Your Audience and Types of Voters*
   - This is an introduction to the concept of targeting specific voters based on information gathered through a number of research activities.
   - It is often difficult for participants to accept eliminating a group of voters (Opponent's Base Voters) before they start their campaign. Remind participants that the training focuses on being effective with limited numbers of people, money and time – and they probably don't have enough of any of these to waste. The campaign period is not the time to try and change an opponent's base voters' minds. Tell participants that this kind of activity is best done (if at all) between elections and over the long-term.

Flow of Campaign Materials

PREPARATION PHASE

Elements of Campaigning

↓

Electorate Profile

↓

Targeting

↓

Survey Canvassing

↓

Vote Count

↓

Message Development

↓

PLANNING PHASE

Strategies for Working with Media

↓

Planning and Implementing Outreach Activities

↓

Elements of a Campaign Plan

↓

Building a Campaign Team

Four Phases of Effective Campaigns

1. ***Preparation:*** Conduct **research** to define campaign goals.

2. ***Planning:*** Design a **strategy** of activities and tactics to reach goals.

3. ***Organizing:*** Build a **team** and the **resources** to implement the strategy.

4. ***Executing:*** Put that strategy into **action**!

2-2

Three Kinds of Voters

YOUR BASE	**PERSUADABLE VOTERS**	**OPPONENT'S BASE**

Types of Voters

Your Base Voters – planning to vote for your party/candidate and will not change their minds before the election

Persuadable Voters – currently undecided, and will make up their minds based on successful communication of your campaign message

Opponent Base Voters – planning to vote for the opponent and will not change their minds before the election

Session 3
First Steps in Preparation: Research

Objectives:
1. Clarifying the goals of research as part of preparing an election campaign.
2. Introducing core information needs for the campaign (identifying specific information about the electorate, types of voters in the electorate, issues important to targeted voters) and activities to meet those needs.

Time:
30 minutes

Materials:
- ✍ Flip chart divided into 2 columns, titled “Types of Research” and “Types of Information”
- 🗋 Goals of Research in the Preparation Phase (3-1)

Process:
1. Ask participants what kind of research their parties currently do or have done as part of preparing for a campaign and what kind of information they get through the research they do. Record their responses in the appropriate column on the flip chart.

2. Distribute the handout and review. Understanding demographic, social and economic trends in the electorate and what issues voters consider important helps parties/candidates develop campaign messages and strategies that can influence voting decisions among base and persuadable voters. Do the research methods currently used help them get this kind of information? Is it accurate? How do they know?

3. Explain that the next three sessions will focus on methods to identify specific information about the electorate, the types of voters in the electorate and the issues important to targeted voters. Used together, the methods provide a consistent approach to collecting information and verifying its accuracy. The results of this kind of research help parties/candidates make decisions about where to concentrate their limited human and financial resources and their time.

☑

Trainer Tips

- This session presents a short overview of the upcoming three sessions on Electorate Profile, Targeting and Survey Canvassing, all of which help parties/candidates gather specific verifiable information that they can use to focus their campaign activities on those voters who are most likely to vote for them or who might be persuaded to vote for them.

- It is important to emphasize that in this part of the preparation phase, the focus is on gathering information rather than promoting the party/candidate in order to have accurate information on which to base pragmatic decisions about campaign strategy. This information will be used to (a) help develop a campaign message that will appeal to base and persuadable voters (b) carry out campaign activities in specific geographic locations which are targeted based on the information collected.

- The three methods are complementary rather than interchangeable. Each helps the party collect different kinds of information, which taken together will give the party/candidate a more complete and accurate understanding of their electorate.

✍ 3-1

Goals of Research in the Preparation Phase

Identify **Base** and **Persuadable Voters**, and:

- Make sure they're registered to vote.
- Begin a dialogue with them on issues that identify as important.
- Look at trends in geography and demography for purposes of message and Election Day efforts.

Session 4
Electorate Profile

Objectives:
1. Participants prepare a detailed profile of their selected electorate.
2. Participants learn to think in more detail about their selected electorate.
3. Information gaps are identified and potential sources of information to fill those gaps are identified.

Note: *Participants will use information (number of registered voters voter turnout from previous election data as well as other demographic information) they have brought from a selected electorate in their region to do this exercise. See the "Participant Preparation" section in How to Use This Manual for more details.*

Time:
2 hours

Materials:
- ⦿ Flipchart paper, markers
- 🗋 Sources of Statistical Information (4-1)

Process:
1. One of the first steps in research is learning more about voters, especially base and persuadable voters: who are they and where are they? This mapping exercise will help participants develop a profile of a specific electorate.

2. Divide into groups by party and region. (If there is not more than one participant from a region, they can be divided by party only.) Each group should choose one clearly defined geographic area from at least one group member's working region. The selected area should be fairly small both geographically and demographically (e.g., poll, neighborhood). If participants have not brought specific information with them, have them contact their party office during the break to get the information. Groups should not be larger than 5 people and can be as small as 2 people.

3. Each group should record the following information for their selected electorate on a flipchart: (This list should be prepared in advance as a flipchart.)
   - Total population (number)
   - Number of voters registered in previous election
   - Number of voters who voted in previous election
   - Number of votes for party in previous election
   - Gender (M/F)
   - Age groups (17-24, 25-34, 35-44, 45-54, 55+)
   - Family status (single, married w/o kids, married w/kids, widow/widower)
   - Average education levels (elementary, high school, college/university, none)
   - Employment (type)
   - Income (monthly)
   - Ownership (land, business)
   - Special concerns of voters
   - Important issues in region (of which the electorate is part)
   - Major economic activities in region
   - Level of security* (low, medium, high)

   **This category should be included if there is a history or likelihood of violence.*

4. If the group does not have information for a category, they should write potential sources for the information they lack.

5. Have groups present their results. Ask:
   - Which categories of information were easy to know? Which were difficult?
   - Where did they get the information? How do they know it is accurate? How could they check the veracity of the information?
   - Where they did not have the information, have they identified potential sources of information? How would they access these? Have participants suggest other sources for information gaps.

6. Distribute the handout Sources of Statistical Information (4-1). Do participants think they could access information through the sources suggested? Are there any other sources of information they would add?

7. We now have general profiles of the selected electorates that tell us something about different characteristics of the electorate (mostly poor, mostly young, mostly industrial, etc). For women candidates, some of the information in profile may provide important information about whether the location may be a source of a consituency that may have a particular interest in supporting women candidates or those promoting issues of concern to women. We also will learn what kinds of information we do not have or that we have to check for accuracy.

8. If we collect this kind of information, we can use our findings to tailor our election campaign message and strategies in a way that will be accepted by the electorate. It also shows them that we are knowledgeable and responsive to their interests. Specifically, collecting information for an electorate profile will give us important information on voter issues and interests that will help in the planning of campaign activities that will appeal to those voters.

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Trainer Tips

- There is a common tendency for participants to assume that they know a lot about their electorates. By asking participants to focus on specific detailed information about a real geographic location, this exercise forces participants to think about what they actually do know and what they do not know about the electorate.

- It is not important if participants do not know information for all the categories. What is important is that they are able to identify where they can get the information and how they can access it.

- The key pieces of information participants will need to carry out a number of subsequent activities are: Number of voters registered in previous election (or for an upcoming election if the information is available), the number of voters who voted in the previous election and the number of votes their party got in the previous election.

- This exercise helps participants start focusing on issues that are real and important to the electorate. Be sure to challenge participants on the accuracy of the information they are presenting. Remind them that this is just one part of the research they must do – activities such as survey canvassing will help them verify the accuracy of their information.

- The results of this exercise will be used in a number of subsequent sessions by the same groups of participants. Keep results posted where they can be easily seen and accessed.

Sources of Statistical Information

- Census Figures
- Election Oversight and Management Bodies
- Birth, Death, Marriage and Motor Vehicle Registries
- Regional and Local Administrators
- Universities and Think Tanks
- Marketing Firms
- Internet Resources
- Local and International NGOs

Session 5
Targeting

Objective:
1. Introduce and explain the concept and method of targeting by analyzing past voting patterns to determine the types of voters in a specific geographic location.

Time:
60 minutes

Materials:
- ⦿ Flipchart paper, markers, calculators, Electorate Profiles (Session 4)
- 🗋 Targeting (5-1)

Process:
1. Explain that targeting is a method to help us tailor our limited human, financial and time resources so that we reach the maximum number of our current (base) and potential supporters with our campaign activities. Learning more about our electorate in general as we did in the last session is one part of this process. In this session, we will learn a specific way to target voters who already support us to ensure they will vote for us again, and those who we might be able to persuade to vote for us this time around.

2. We are going to use the information from previous elections that are in each group's Electorate Profiles to analyze how people voted in a specific district. We want to analyze this information to find out which category of poll our selected electorate falls into. The categories of polls are: (This list should be prepared in advance as a flipchart.)

   A Poll = core supporters
   B Poll = highly persuadable
   C Poll = somewhat persuadable
   D Poll = almost no chance we can persuade them

3. Distribute the handout Targeting (5-1). We categorize our selected electorate by calculating the ratio of votes a party or candidate gets (out of every 10 votes) in that location. There are two sets of ratios; one set that is used for larger party and one for medium or small parties. A large party is one, which usually gets a large percentage of the total votes in elections. Parties that do not get a large percentage of votes in elections are considered medium or small parties. The two sets of ratios are:

   Ratios for Large Parties
   A Poll = 6+ out of every 10 votes
   B Poll = 4-5 out of every 10 votes
   C Poll = 2-3 out of every 10 votes
   D Poll = 0-1 out of every 10 votes

   Ratios for Medium and Small Parties
   A Poll = 4+ out of every 10 votes
   B Poll = 2-3 out of every 10 votes
   C Poll = 1-2 out of every 10 votes
   D Poll = 0-1 out of every 10 votes

To analyze the poll, we carry out the follow calculation: Divide the number of votes received by the total number of votes in the selected electorate and multiply the result by 10.

Example: Party X receives 253 votes out of a total of 1,103 votes.

$$\frac{253}{1{,}103} \times 10 = \frac{2{,}530}{1{,}103} = 2.29 \text{ out of every 10 votes} = \text{C Poll}$$

It may be easier for participants to understand if the formula is presented in terms of percentages. However, remind participants to convert the percentage ratio to the number of votes out of 10, so they can complete their poll analysis.

$$\frac{253}{1{,}103} \times 100\% = \frac{25{,}300}{1{,}103} =$$ 22.9% or 22.9 out of every 100 votes. In other words, 2.29 out of every 10 votes

Knowing what category of poll a specific location falls into helps us plan our campaign activities more effectively. If we learn through our analysis that the location is a D Poll, this tells us that the voters are mostly from our opponent's base – and therefore, we will not focus our campaign in that location at all. If we learn that the location is an A poll, we carry out campaign activities that focus on ensuring our core supporters are registered to vote and indeed come out to vote on election day. If we learn a location is a B or C poll, our campaign activities will focus on communicating a campaign message that will appeal to those voters and hopefully influence their voting decision.

4. Have participants return to their groups from the previous session. Using the information from their Electorate Profile (total number of votes received at that location and total number of votes their party/candidate received during the previous election), each group should calculate how many votes out of every 10 votes their party/candidate received. The result will tell them which category of poll their selected electorate falls into.

5. Review the groups' results and make sure they have carried out the calculation correctly.

6. Ask participants if the results are consistent with assumptions they had about their selected electorate. Have participants suggest ways they can use the results in their campaign.

7. Summarize by saying that the method is a tool to:
   - Help parties/candidates decide what kinds of campaign activities they should carry out in a specific location.
   - Eliminate any D Polls as locations for campaign activities.
   - Identify where B and C Polls are located so parties/candidates know where to look for information of importance to those voters that can be used to develop campaign messages that will influence those voters' voting decisions.

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Trainer Tips

- This session helps participants focus on real information rather than assumptions about levels of support for their party/candidate.

- It is important that participants understand this method is decision-making tool that increases a campaign's effectiveness by eliminating specific geographic locations from campaign activities so they do not waste valuable human and financial resources and time.

- By the end of the session, participants should be more conscious of the importance of thinking about their campaign in terms of specific geographic locations. The following session on Survey Canvassing builds on the targeting analysis – once a party/candidate knows where B and C Polls are located, they can plan their Survey Canvass activities to gather more specific information from the voters they may have a chance of influencing.

Targeting

Targeting begins to put the pieces of the puzzle in place. Through targeting, the party will:

- Have a clear picture of **who supporters and potential supporter are**, and where they live
- Have a better sense of the **issues that are important** to voters
- Begin to see **how many votes** it will need to reach its electoral goals
- **Manage scarce resources** more effectively

Categories of Polls

A Poll = core supporters
B Poll = highly persuadable
C Poll = somewhat persuadable
D Poll = almost no chance we can persuade them

Ratios for Poll Analysis

Ratios for Large Parties
A Poll = 6+ out of every 10 votes
B Poll = 4-5 out of every 10 votes
C Poll = 2-3 out of every 10 votes
D Poll = 0-1 out of every 10 votes

Ratios for Medium and Small Parties
A Poll = 4+ out of every 10 votes
B Poll = 2-3 out of every 10 votes
C Poll = 1-2 out of every 10 votes
D Poll = 0-1 out of every 10 votes

Session 6
Components of Survey Canvassing

Objectives:
1. Participants learn about the different components of survey canvassing in election campaigns and their functions.
2. Participants develop kit maps, canvass team structure and schedule and FAQs.

Time:
90 minutes

Materials:
- ⦿ Large envelopes or folders, index cards, fine markers, blank paper, highlighting markers, glue sticks, Electorate Profiles from Session 4, Sample Kit
- 🗋 Survey Canvassing (6-1), Canvassing (6-2), Sample Map (6-3), Sample FAQ (6-4)

Process:

Part 1 (30 minutes)
1. Survey canvassing is an activity where parties/candidates ask targeted voters (A,B,C) what's important to them. This campaign activity also benefits the party/candidate by:
   - Helping begin the process of recruiting volunteers
   - Testing field capabilities and level of organization (campaign readiness)
   - Giving volunteers, party activists and candidates an important and high-profile task
   - Increasing party/candidate visibility

   Ask participants how their party currently finds out what is important to voters. To what extent do the methods they use bring them into direct contact with the voters? Who carries out the activities?

3. Distribute handouts Survey Canvassing (6-1) and Canvassing (6-2) and review the types of canvassing:
   - Door-to-door
   - Telephone
   - Public gathering places

3. Explain that the different components of survey canvassing provide tools and a structure to meet the overall goals of canvassing, which are:
   - To identify issues that are important to voters.
   - To verify information on Base and Persuadable voters, where they live and what issues are important to them.
   - To demonstrate to voters that the party is active, engaged and concerned about the citizens.

   The emphasis of canvassing activities is finding out from individual A, B and C category voters what issues are important to them with a secondary function of letting potential supporters know about the party/candidate platform. We also want to link that voter with a specific address for follow-up if they are a base/persuadable voter or to avoid in future if they are our opponent's base voter.

4. In order to carry out a survey canvass, volunteers, party activists and candidates are used. For door-to-doors or to meet voters in public gathering places, they go to neighborhoods, usually in teams of two, at times of the day or evening when potential supporters are most likely to be available. For telephone canvassing, activities are carried out in a party office where multiple telephone lines are available.

5. The basic tools for the survey canvass are contained in a kit. The kit will include:
   - **Voter List** or last register
   - **Map** of area to be canvassed
   - **Survey and Script**
   - **FAQs (Frequently Asked Questions)** for canvassers
   - **Party or Candidate Literature** to leave behind (must include contact information)
   - **Follow-up forms** in case visit needs further attention.

6. Each team goes to the house of each person on their voters or residents list in their assigned area indicated on the map. Addresses of those houses they visit and the resident's name, if available, should be recorded. The outcome of the visit (home and interviewed, home but not willing to be interviewed, not home) should also be recorded. Using the script and survey questionnaire, teams interview any voter willing to be interviewed and record their responses. Following each visit, they should complete the follow-up form. Once the entire canvass is complete, kits are returned to the canvass coordinator so that results of the interviews can be tabulated, put in a database and follow-up activities planned.

7. Teams should be made up of two people who, where possible, reflect some characteristic of the prospective voter. For example, they should come from the same general age group or the same gender or ethnicity. This information should be available in the electorate profile already completed. The principle is, peers should canvass peers. Wherever possible, at least one member of the pair should be a woman; people are more likely to open their door to a woman than to a man.

8. Summarize: Survey canvassing is one of the least expensive ways of carrying out research. It provides multiple benefits through direct data collection and increasing contact between the party/candidate and potential supporters.

Part 2 (60 minutes)

1. *Kit Preparation Exercise:* Divide participants into the same group as in Session 4 (Electorate Profile). Give each group an envelope, a number of sheets of paper, fine markers, highlighting marker, index cards and a glue stick. Ask each group to:
   - *Create a kit map* by drawing a simple map of their selected electorate (usually about 200-500 households) on a small sheet of paper. On their maps, they should highlight boundaries around groups of 30-50 households – a small enough number of households for a canvass team to reach within a 4-6 hour period. Once they are finished, they should stick the map on their envelope.
   - *Decide on the canvassing team and schedule.* How many people will they need to canvass their selected electorate in a reasonable period of time? Do they know who is available to help with this kind of activity? If not, where would they find them? Each group should come up with the number of people required to survey canvass their selected electorate in a definite time period. Example: They would need 10 teams of 2 people each (20 people total) to canvass 300 households (30 households/team) in one 4-6 hour period. They could also use 5 teams of people each to canvass the same area but they would need 8-12 hours. They should write their schedules on the index card and put it in the envelope.

- *Develop a FAQ.* Brainstorm: What are the really hard or uncomfortable questions that your party gets asked (by media, by critics, by voters)? Once the group has a list of the questions, they should write their answers: What responses would satisfy the people who ask these hard questions. The group should write up their FAQ on a sheet of paper and put it in the envelope.

2. Have groups present their maps, canvass teams and schedules and FAQs. Discuss: Are the canvass teams and schedules realistic? Would they be able to replicate this kind of activity in numerous electorates, not just one? Would the answers provided in the FAQs satisfy a persuadable voter?

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Trainer Tips

- If possible, make up a sample kit using materials from the local context. Each kit should have a map, a sample or mock list of the voters in the area to be canvassed, party/candidate brochures, questionnaire, follow-up form. If local materials are not available, use material from the handouts for this session. Handout 6-1 (Canvassing) contains detailed information about how to put together a canvassing kit.

- Although this session focuses on door-to-door canvassing, the same tools can be used for telephone canvassing or canvassing in public gathering places. What is important is that information is collected systematically and directly from voters in specific locations.

- Remind participants that general information they may know from their Electorate Profiles can help plan a more effective canvass. It can help them decide which days and what time of day they would most likely be able to meet with voters. For example, if most people in the selected area are working, it is best to canvass in the evening or on weekends. It can also help them choose canvassers who are most likely to be able to reach voters in a given area. For example, if there are a lot retired voters in an area, it might be best to use older volunteers or workers as canvassers in that area.

- Providing canvassing teams with FAQs means that the party will be communicating its responses to hard questions consistently and volunteers will not have to improvise their answers. It also helps volunteers be more confident with the task.

Survey Canvassing

Survey canvassing takes place between and before elections.

Its objectives are to:
- Identify issues that are important to voters
- Verify information on Base and Persuadable voters, where they live and what issues are important to them
- Demonstrate to voters that the party is active, engaged and concerned about the citizens

Survey canvass kits should contain:
- **Voter List** or last register
- **Map** of area to be canvassed
- **Survey and Script**
- **FAQs** for canvassers
- **Party or Candidate Literature** to leave behind (must include contact information!)
- **Follow-up forms** in case visit needs further attention

Using Survey Canvasses
- Survey Canvassing provides affordable research!
- Survey Canvassing helps expand that base of support!
- Builds relationship with A & B voters
- Activates volunteers and supporters
- Is and excellent way to verify perceived support levels
- Builds the party's profile among voters

But. . . **You've got to bring that information home!**
Use simple technology to track issues, measure support, assess message effectiveness, monitor voter registration, etc.

Canvassing

In general, to get a vote, you must ask for a voter's vote anywhere from three to eight times. You can ask in ads in the newspaper, on TV, in direct mail, on lawn signs, or by canvassing. In small communities, canvassing is a great way to get a feel for your constituency and their concerns, and it can also be among the most elevating and gratifying experiences in a campaign.

However, canvassing is not about changing minds. It is about changing voter turnout. You can do that by going to the door of likely supporters, thereby reminding them that you need their votes to win. *Canvassing is about finding and activating supporters – that is, getting them to vote*.

Please, do not think you will go into a neighborhood, drop off a piece of campaign literature, and have someone read it, hit herself on the forehead and say, "My God, I have been a fool! This is the candidate for me." It doesn't work that way. Canvassing does not change minds. Nine out of ten people don't even read the material. Your hope is that they will place it somewhere in their houses and remember the name while voting. Don't get me wrong; there will be a few who thoughtfully read and digest the material and even change their minds, but they are the minority. When you canvass, you are simply activating people already sympathetic to your cause or candidate.

I have never worked in a campaign where I did not canvass. Canvassing is an effective and inexpensive way to get your message to voters. It can also be a great way to get a feel for your chances of winning. In my last mayor's race the lawn signs* for the opposition lined the main road through town making things look bleak. However, after I started canvassing, I realized how handily we would win, and I felt much more relaxed in all my campaign activities because of this. Canvassing will give you this information, and it will help you get additional lawn sign locations in key spots.

If done right, you will also get valuable feedback on what the voter concerns are so that you can shape and mold advertising and debate emphasis to meet those concerns.

Canvassing is a time-consuming, resource-intensive way to activate sympathetic voters and bring your message to the people. Nevertheless, there are few, if any, campaign activities that will give a bigger return on investment.

Map Packets

Before volunteers or the candidate can canvass the electorate, you must determine where to expend your efforts (through precinct or poll analysis) and you must prepare maps of those areas for your canvassers. After these tasks are completed, the canvassing activity itself begins. Although I always do the precinct analysis and map preparation myself, I like to break my city in half and have two canvass coordinators. If you are in a bigger city, you may want to break it down even further. If it is a county, keep breaking it down so that people can oversee manageable units of people and space.

**Lawn signs are signs made up in advance by the party with the candidate name, party name, the party logo and sometimes the party slogan. They are given to supporters who are willing to place them on their property in a prominent place during the campaign period. Banners are also sometimes similarly used.*

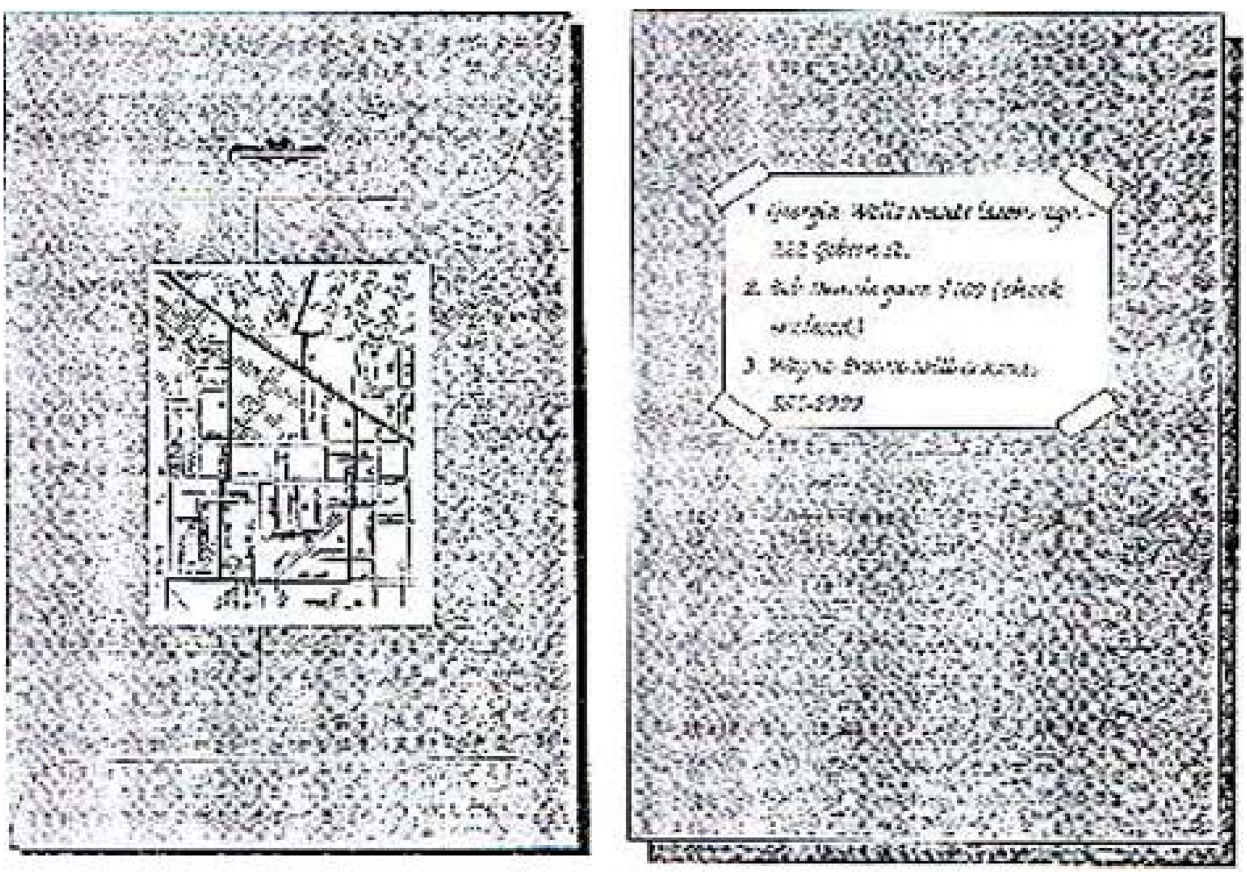
Setting up canvass map packets is a critical element to a successful canvass. Do not wait to do this with the canvassers when they arrive. Map packets should be organized and ready when volunteers walk in the door. Remember the rule about not overburdening your volunteers. Set up all activities so your volunteers can see that this is an efficient, well-organized effort.

Setting up map packets for canvassing begins by going to the county clerk or equivalent and getting a precinct map booklet for your county. This booklet consists of large photocopies of the county with precincts outlined in bold and precinct numbers written on the top of each of the voter precinct. If you are running a city election, you will not need the entire book of maps so make copies of what you need.

Typical voter precincts have 400-500 voters, and depending on how spread out or concentrated they are, they take six people working in pairs about 2 hours to complete. Larger or more difficult precincts I give to eight people for a 2 hour shift.

To accommodate a six-person team canvassing in pairs, you need to break precincts into thirds. If you are using eight canvassers, divide precincts into fourths. If precincts are separated from each other down the middle of a street, it may be more efficient to include parts of both precincts for a canvassing team.

On the canvass maps for the pairs, highlight in yellow the part of the precinct you want the canvassers to hit. Be sure to line up your team maps side-by-side to check that streets haven't been missed or double-colored on different packets. Canvassing houses twice is wasteful of volunteer time and annoying to both your volunteers and the voters.



Example of a Canvassing Map Packet

You will need two highlighted maps for each pair of canvassers. Everyone needs a map to work with. No exceptions. I don't care how well someone claims to know the area. Have canvassers mark off the blocks they complete on their map. This helps you keep track of the canvass and canvassers.

To get your canvassing teams ready to hit the streets, you will need many large manila envelopes, about six per precinct. You can re-use manila envelopes during a campaign. Once an area has been canvassed, pull the map from the envelope and tape another in its place.

Take each of your pairs of color-coded maps and attach one map to the outside of the manila envelope. Remember, you will have two packets that are identical because people work in pairs and they will need to stay together. Sometimes I will fold the duplicate manila envelope with the map on it and stuff it inside its partner, or I staple them together. If they get separated, you are bound to have two different teams pick up the same packet and canvass the same area two times. So pay attention to this detail.

Place the materials necessary for the type of canvass you are conducting into each envelope. If you are doing a get-out-the-vote (GOTV) or using walking lists to contact particular people, this is the packet in which you place these materials. Just put all the lists inside one envelope and the matching envelope inside with them. The canvassers can separate out the walking lists when they divide up how they want to work. You may either place a bunch of brochures into the packet or leave them loose by the door for the volunteers to pick up on their way out. Either way, volunteers should still take additional brochures so they do not run out before they have finished their areas. Having map packets keeps brochures looking pretty fresh by the time they reach the door step, and it will also protect them in bad weather.

I often tape a 3" X 5" card on the back of the envelope. That way, if someone canvasses the home of strong supporter, the canvasser can write it on the card and the information will get back to the campaign in a form that's easy to use. For example, supporters may tell the canvasser that they want a lawn sign or would like to be in an endorsement ad or to contribute money if the candidate calls. The canvasser will write this down on the card. When a canvasser returns, just pull off the card and process it. If you do not have time to tape a card to every canvasser's envelope, it works nearly as well to have the canvasser just write the information directly on the envelope. This method, however, requires that you make sure to get that information off before the envelope goes out again.

Make sure you have enough pens so each canvasser has one. I will remind people to bring pens when I call them about the canvass but there will be those who forget. It is a nice touch to have your canvasser write on the front of the brochure "Sorry we missed you" for people not at home.

Sometimes I will staple a personalized message from neighbors in a particular precinct to the brochure. If you do this, you must stuff these brochures inside the canvassing packet. Otherwise, canvassers will get confused and grab the wrong brochures. This is an inexpensive way to get a direct mail testimonial to the doors of potential supporters and well worth the effort to have it ready for the canvassers.

Consider posting a large map of your city or county on a wall where you can mark off areas as they get canvassed. Color code the wall map according to high, medium or low canvass priority. As volunteers complete streets, mark them off in different colored inks. In this way, volunteers get to see their collective work and feel part of a well-run campaign.

In summary:

1. Get precinct maps from the appropriate government agency and make plenty of photocopies of the areas you want to canvass.
2. Break each precinct into thirds.
3. Make duplicates of each portion of the precinct and keep them together for people canvassing in pairs.
4. Yellow highlight the portion of the precinct that each pair of volunteers is to canvass and attach precinct maps to the outside of a large manila envelope. Keep originals of these for future use.
5. Tape a 3" X 5" card to the manila envelope for volunteers to write notes from households offering lawn sign locations, volunteers or money.
6. If specialized notes are to go to specific precincts along with the brochures, place these stapled to brochures inside the manila envelope. Otherwise, have plenty of brochures available for volunteers to grab on their way out the door with their packets.
7. Provide pens or pencils inside each of the packets.
8. Have volunteers mark areas they have canvassed on the maps on their envelopes. Keep track of your progress on a large map on your wall by coloring in streets as they are completed.
9. Send out teams to finish up partially completed precincts as indicated on returned maps.
10. Once attached maps are completed, remove and re-use the manila envelopes.

Organizing the Volunteer Force

Have your volunteers arrive 15 minutes early if they have not canvassed for you before. The moment they walk in, ask them to read the brochures to familiarize themselves with the contents. Generally, I have out a plate of cookies or some little thing to eat plus juice and water. I have coffee on hand if someone asks for it but I do not set it out as people will have to go to the bathroom the minute they get out the door (and they may go back home to do that!). Coffee or not, urge people to use the bathroom *before* they head out to canvass.

In training canvassers, I tell them never to talk the issues. That is for the candidate or the campaign team. No canvasser, I don't care how closely related, can possibly know how a candidate stands on all the issues. So what do canvassers do when asked a question at the door? They can say, "That is a good question. Why don't you give Ellen a call and ask her." Never offer to have the candidate call to answer a question. He or she will get little else done, and a voter who truly wants to know will take a moment to pick up the phone.

The only thing canvassers can truthfully say is why *they* are out working for the candidate. It might be because of the candidate's stand on the environment, development, timber, air quality, transportation, children's issues, taxes, jobs or human resources. Every person who works for you will have a reason for volunteering. Urge your volunteers to think what that reason is before they head out to walk. This directive should be part of your pre-canvassing spiel. Be sure to include things like: "What would motivate you to get out and canvass on a beautiful Saturday when you would probably rather be home with your families?" This is also a nice way to let volunteers know you understand what they are giving up to work for you and that you appreciate it. I also include in my pep talks and training how difficult the odds are of winning the campaign and how important it is that we, not the opposition, win. This brings out the best in your workers.

Scheduling the Volunteers

More than anywhere else in the campaign, I try to accommodate volunteers' schedules for canvassing. Generally I set up four time slots for people on a given weekend. However, if none of those times works for individuals, I will send them out when they can go. Nine times out of ten there will be someone else who can or has to go at that time, so I can provide a partner. If I can't get a partner, I usually go along myself. I do this because it is safer and it is good for the candidate or campaign manager to canvass. In this way, you become more empathic to the efforts of your canvassers, get a better understanding of the voters and demonstrate your willingness to work as hard as the volunteers. Volunteers love to canvass with the candidate or campaign manager.

				Activity: Canvassing (City and Date)
Name	**Phone number**	**Call back?**	**9:30-12:00***	**2:30-5:30***

*Time periods should be for most appropriate times to canvass a selected neighborhood

Example of a Canvassing Activity Card

I think it also important to do special things for your canvassers. If someone tells me she does not like to do hills or that she wants to do her own neighborhood, I make sure to set aside that packet for her and tell her I will meet her request. This also helps eliminate no-shows.

A big part of a good canvassing effort is placing the right volunteer in the right precinct. For example, if you have an area with a senior population, place your older canvassers in that area. If you have canvassers whose dress is odd or in some way inappropriate, put them in a more progressive area or have them work on some other part of the campaign. Peers should canvass peers. Whomever you assign, remember that when they knock at the door, they represent the campaign. I generally let people know before they canvass that they must present themselves well to the public and look nice.

Sometimes you will have volunteers in areas of swing voters, and many times these swing voters are overwhelmingly registered with one party over another. (Remember swing voters are people who do not always vote along party lines but rather tend to vote based on issues.) I will try to place a canvasser who is the same party affiliation as the precinct. That way, when someone answers the door and says they vote party line, the canvasser can say, "I know, I usually do too but this election I'm voting this way because…"

Bad Weather
There are bound to be days of bad weather scheduled for canvassing. When I am working on a campaign, I pray for a rainy drizzle. And I tell my canvassers to pray for rain and dress accordingly. Why? Because, when it rains, more people are home and your campaign gets bonus points for getting out in bad weather. People open the door and feel sorry for you and admire your dedication. I have also noticed that volunteers don't mind canvassing in bad weather. Think about it. If it is a sunny glorious day, wouldn't you rather be out doing something other than canvassing? If the weather is lousy, canvassing is a good thing to do with your time.

One very effective way I have found for getting more people to canvass is ask every person who has agreed to canvass to bring a friend. This makes it more fun for that individual, increases your volunteer numbers, and helps to reduce possible no-shows. Since canvassing is conducted in pairs, it is an ideal activity for friends or couples. It is also safer in two's.

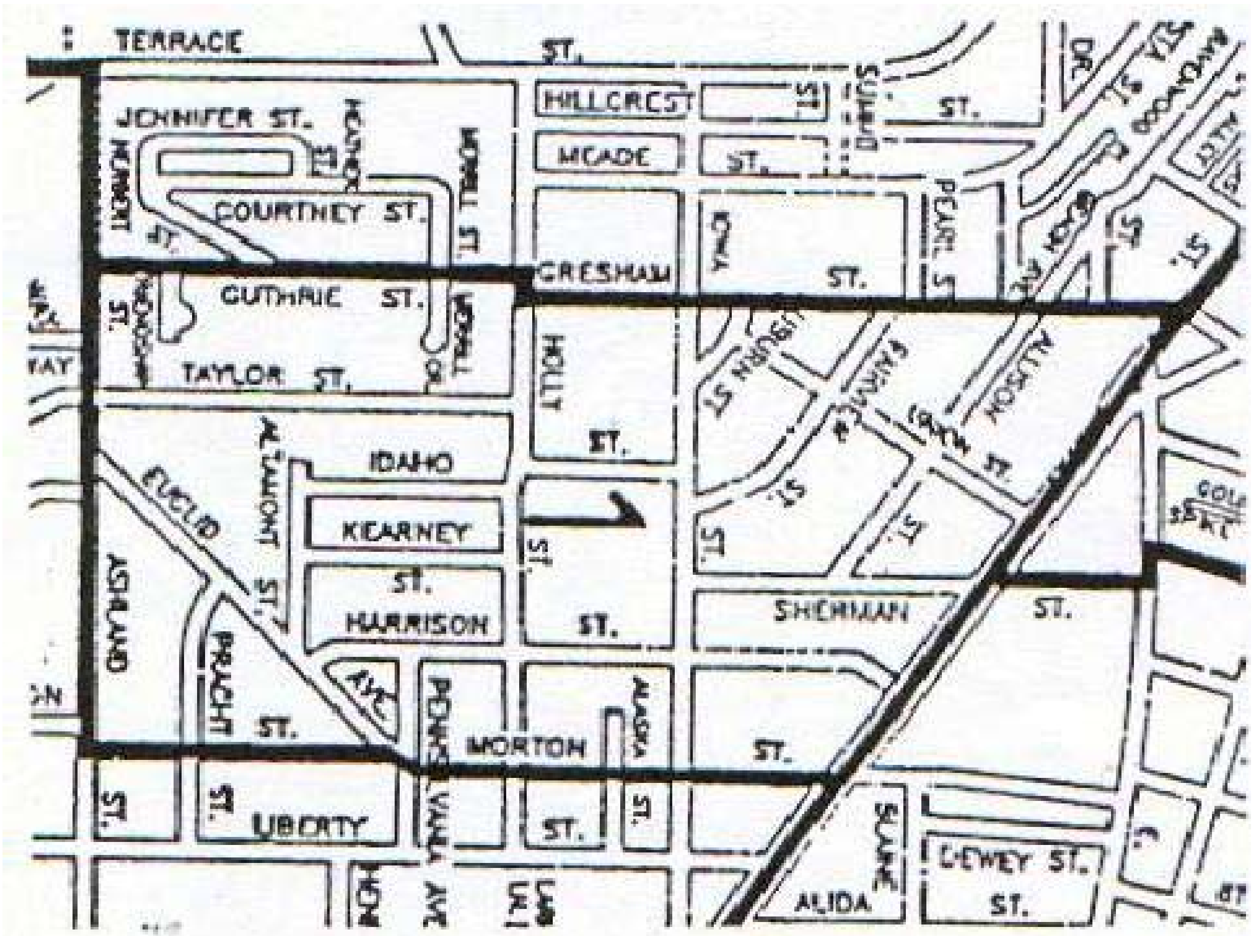
Remember, put no campaign literature in or on mailboxes and also make sure your campaign literature does not become litter. When residents are not home, instruct volunteers to wedge it into door jambs, screen doors and trim boards so it cannot escape into the wind.

If you are the candidate, it is fine to use volunteers to help with canvassing. However, because it is much more effective for the candidate to knock on the door, the candidate must cover as much ground as possible. Don't, however, overdo it. Pace yourself. Start early enough in the campaign so that you canvass as many homes as possible. The personal touch really works. The candidate should have someone to work with, if possible. It's also helpful to have someone else covering the area because the candidate is likely to spend too long talking to each voter.

In summary:
It bears repeating that it is critical to a successful campaign to have a large number of people turn out to volunteer. Canvassers feel good when they are clearly part of a larger effort. They are further reinforced in their commitment to the campaign when they show up and see friends and neighbors working there as well.

1. Carefully select your canvassing volunteers. Use people who are in relatively good shape and individuals who are able to walk for two hours at a time. Save apartments or areas of flat, heavy concentration for individuals who are out of shape.
2. Select the right volunteer for the right precinct. Peers should canvass peers. Have volunteers canvass their own neighborhoods.
3. Accommodate the schedule of the canvassers. If they cannot make a scheduled time, find a time when they can and find them a partner. This is a great way to finish up partially completed precincts.
4. Use the same 5" X 8" cards to sign up volunteers for the canvass.
5. Call back your volunteers to make sure they will still be coming. Remember, do not ask if they still intend to canvass. Instead, remind them to bring something or ask what time you asked them to come in case you made a mistake.
6. On the call back, reschedule volunteers who forgot about the canvass.
7. Ask volunteers to bring a friend.
8. First thing, have your canvassers read the literature they will dropping off at homes. They should be familiar with the material.
9. Set up a role-play door-knocking demonstration as part of the volunteer training before they head out the door.
10. Do not serve coffee or tea to canvassers before they head out, only juice or waters. Remind them to use the bathroom before they leave.
11. Remind volunteers to secure materials left at doorsteps to prevent litter.

Sample Map for Kit



Sample FAQ

From Howard Dean, US Presidential Candidate FAQ on Healthcare:

Q: Why is he running for President?
In a nutshell, Governor Dean feels that the current administration is short-sighted in both domestic and foreign policies and that "our nation desperately needs a long-term, visionary approach to our current challenges". He wants to bring honesty and fearless leadership back to the Democratic Party and he believes he has the experience, the resolve, and the guts to do the right thing for America.

Q: Does he have a chance of winning?
A: He was considered a long shot in the beginning of 2003, but his straight-forward style and appeal to common values has created the largest and most effective grass roots political organization this nation has ever seen. He raised more money than any other Democratic candidate in the second quarter of 2003 and continues to increase his support base on a daily basis. Recent polls show him tied for first or leading in New Hampshire and Iowa (two of the earliest primary states), as well as leading in California and jumping from last to 2nd place in nationwide polling. Finally, a recent Wall Street Journal article concluded that Governor Howard Dean appears to be the only candidate who has the capacity to beat Bush in the general election.

Q: What if I am not ready to commit time or money to any candidate right now?
A: At least make sure you know who Dr. Dean is – check out this healthcare specific website, as well as his general campaign web site and watch for him on the news more and more!

Q: Did he do something radical to improve healthcare coverage, and can the same process be used for the whole nation?
He realized that it would be very difficult to implement a radical change such as a single payor system. Instead, he used common sense to expand certain insurance programs for the young and the elderly, and to support the current infrastructure of private healthcare insurance to be more affordable for everyone else. The bottom line is that this same incremental approach could be used at a national level- expand our current programs now to ensure everyone can have access to affordable health insurance if they need it.

Q: Does Dr. Dean have any specific plans to help fulfill his principles?
Dr. Dean proposes five specific steps the Federal government can implement to improve care and contain costs. These five steps are: (1) Create a new Healthcare Institute within the NIH to come up with better solutions for both quality and cost issues; (2) Adopt state of the art information technology systems to improve care and decrease paperwork; (3) A multi-pronged approach to containing prescription drug costs; (4) Convene a White House Conference on Healthcare Effectiveness that brings together the best minds in the nation to help solve clinical, administrative and financial issues that affect both patients and physicians (e.g. Evidence-based medicine, Malpractice reform, Paperwork reductions); and (5) Value Based Purchasing that helps properly align reimbursement with the quality and efficiency of care delivered by healthcare providers.

DAY TWO

Theme:

Campaign Context and How To Use It

Sessions:

Survey Canvassing Skills

Next Steps in Preparation: Analysis and Message Development

Vote Count

Message Development

Session 7
Survey Canvassing Skills

Objectives:
1. Participants will learn and practice skills that will help them carry out survey canvassing.
2. Participants will create survey questionnaires and scripts to use in survey canvassing.

Time:
60 minutes

Materials:
- ⦿ Paper, pens, Role Cards
- 🗋 Sample Questionnaires and Follow-Up Forms (7-1)

Process:

Part 1 (30 minutes)
1. Review the Sample Questionnaires and Follow-Up Forms handout (7-1). Note that there are three parts to the survey canvass tool: the script (introductory words), the questions voters will be asked and things for the party/candidate to follow-up on after the survey canvass. Remind participants that the main objectives are to identify issues that are important to voters, verify information on base and persuadable voters and where they live.

2. Have participants return to the same groups from Session 4 (Electorate Profile). Each group should complete a script, questionnaire (5-8 questions) and follow-up form they could use to survey canvass their selected electorate.

Part 2 (30 minutes)
1. *Survey Canvass Role Play:* Explain that you are going to ask one member of each group to practice the script and questionnaire they developed. You are also going to ask member from another group to play the role of a voter being questioned. Give each volunteer one of the following role cards or ones made up based on information from Electorate Profiles before they start their role play:
   - 17 year-old urban boy,
   - 60 year-old widow in village
   - 45 year-old businessman
   - 31 year-old housewife with 2 kids
   - 24 year-old male factory worker
   - 50 year-old female government employees

2. Following each role-play, ask the participant who acted as the canvassers how it was using the script and questions developed by their group. Ask the participant who role-played how it felt to answer the questions. Solicit additional feedback from other participants. Are there any questions they would suggest changing?

3. Have participants make any changes based on suggestions or their role-play experience to their scripts or questionnaires. They can now include these in the survey canvass kit from Session 6.

☑

Trainer Tips

- Make sure participants understand that the script is an important and integral part of preparing the survey questionnaire. It gives survey canvassers a clear approach to communicating the purpose of the survey and helps warm up the person for the interview. It also helps survey canvassers present themselves consistently and professionally as representatives of the party.

- It is helpful to tell the person to be interviewed how long the interview will be – this can be included in the script.

- As with the script, thanking the person interviewed when closing the interview is important and acknowledges that their time is valued.

- The questionnaire is a tool that ensures that all canvassers will be collecting the same kind of information, which helps the process of data analysis and also supports the image of the party as consistent.

- The questions used in the questionnaire help canvassers (who are often volunteers) feel confident about how to ask for information, including how to ask voters about their voting habits and if they are prepared to support the party/candidate.

Sample Questionnaires and Follow-Up Forms

Northern Ireland Women's Coalition
Survey Canvassing Questionnaire

Name of Occupant: ________________________ Address: ___________________________

Good Morning/Afternoon/Evening. My name is ________ and this is my colleague, _________. We're in your area today on behalf of NAME OF CANDIDATE asking people about what's on their minds at the moment. Do you mind if we ask you a few brief questions?

1) What do you think the most important issue is for Northern Ireland? *SELECT ONE*
- ❑ Keeping 11+/Reforming 11+ *(circle one)*
- ❑ Reducing Hospital Waiting Lists
- ❑ Paramilitaries
- ❑ Road Safety
- ❑ Environmental Issues
- ❑ Decommissioning
- ❑ Drug Crime
- ❑ Policing
- ❑ Restoring the Assembly
- ❑ Other ________________________

2) On a scale of 1 to 10, with 1 being the least important and 10 being the most important, how would you rate the issue of NAME LEAD ISSUE FOR CANDIDATE IN THAT CONSTITUENCY?

3) In terms of the upcoming Assembly elections, are you aware that you will need an official photo ID to vote?
- ❑ Yes
- ❑ No

Valid ID for voting includes: a British or Irish Passport, NI driving license, Translink Smart Card or an electoral ID card obtained from the Electoral Office.

4) Do you need any assistance getting the proper identification for voting?
- ❑ Yes
- ❑ No

5) Thinking about the Assembly election in May, are you familiar with NAME OF CANDIDATE, the Women's Coalition candidate in this constituency?
- ❑ Very Familiar
- ❑ Somewhat Familiar
- ❑ Don't Know Her at All
- ❑ Don't Know/No Opinion

6) Do you think it's important that political parties dedicated to progress and inclusion, like the Women's Coalition, are present in the Assembly?
- ❑ Yes
- ❑ No
- ❑ Don't Know/No Opinion

7) Have you give the Women's Coalition a first or second preference vote in the past?
- ❑ Yes
- ❑ No
- ❑ Don't Know

8) Are you considering giving NAME OF CANDIDATE and the Women's Coalition a first preference in the upcoming elections?
- ❑ 1st Preference
- ❑ 2nd Preference
- ❑ Lower Preference
- ❑ Undecided/Don't Know
- ❑ Solid No

9) Is there anyone in the household who might need a lift to the polls?
- ❑ Yes
- ❑ No

10) Is there anything else you would like to add?

Close with Message/Call to Action:
Thank you very much for your time and input! Please remember to give the Women's Coalition your #1 and then vote all the way down the ballot paper.

<u>For Canvassers to fill out at end of visit.</u>

Canvassers: Is there any follow-up required for this visit?

- ❑ Yes
- ❑ No

If Yes, please state nature of follow-up required.

- ❑ Would like to volunteer
- ❑ Would like to be kept informed about the campaign
    - o Email address: ____
- ❑ Would like to join party
- ❑ Would like to donate to party / candidate
- ❑ Has a question that needs to be addressed
- ❑ Has a complaint that needs to be addressed
- ❑ Needs Voter ID for elections
- ❑ Needs a lift to the polls on Election Day

Please explain or add any additional comments if necessary:

____

____

____

____

Democratic National Committee Survey Canvassing Questionnaire

Name of Occupant: ________________________ Address: _____________________________

Good Morning/Afternoon/Evening. My name is ________ and this is my colleague, _________. We're in your neighborhood today on behalf of the Democratic Party, asking people about what's important to them. It's vital that we get your views about what the priorities should be for our communities. Do you mind if we ask you a few questions?

1) What do you think the most important issue is for this community?
- ❑ After-School Programs for Children
- ❑ Traffic Calming
- ❑ Creating More Affordable Housing
- ❑ Lowering Water Rates
- ❑ Other __________________________

2) On a scale of 1 to 10, with 1 being the least important and 10 being the most important, how would you rate the issue of Traffic Calming?

3) Are you familiar with your State Representative, Jill Smith?
- ❑ Very Familiar
- ❑ Somewhat Familiar
- ❑ Don't Know Her at All
- ❑ Don't Know/No Opinion

4) How do you feel about the job Representative Smith is doing?
- ❑ Very Good
- ❑ Good
- ❑ Fair
- ❑ Poor
- ❑ Don't Know/No Opinion

5) What do you think is the most important issue for the country?
- ❑ Fighting Terrorism in America and Abroad
- ❑ Increasing the Minimum Wage
- ❑ Helping the Working Poor
- ❑ Promoting Civil Rights for All Americans
- ❑ Keeping Taxes Down
- ❑ Creating Jobs and Improving the Economy
- ❑ Other __________________________

6) On a scale of 1 to 10, with 1 being poor and 10 being excellent, how would you rate the performance of the Democratic Party on the issue of increasing the minimum wage?

7) On a scale of 1 to 10, with 1 being poor and 10 being excellent, how would you rate the performance of the Democratic Party on the issue of fighting terrorism in American and abroad?

8) Have you voted for the Democratic Party in the past?
- ❑ Yes
- ❑ No
- ❑ Don't Know

9) Are you considering voting for the Democratic Party in the next election?
- ❑ Solid Yes
- ❑ Leaning Yes
- ❑ Leaning No
- ❑ Solid No
- ❑ Don't Know/Undecided

10) Is there anything else you would like to add?

11) Thank you very much for your time and input!

For Canvassers to fill out at end of visit.

Canvassers: Is there any follow-up required for this visit?

- ❑ Yes
- ❑ No

If Yes, please state nature of follow-up required.

- ❑ Would like to volunteer
- ❑ Would like to join party
- ❑ Would like to donate to party / candidate
- ❑ Has a question that needs to be addressed
- ❑ Has a complaint that needs to be addressed

Please explain:

Canvassing Follow-Up Form

Name of Voter:

____

Address:

____

Phone Number(s):

____

Name of Canvasser(s): ________________________ **Date of Contact:** _____________

What is the nature of the request/question?

- ❑ Would like to volunteer
- ❑ Would like to join party
- ❑ Would like to donate to party / candidate
- ❑ Has a question that needs to be addressed
- ❑ Has a complaint that needs to be addressed

Please explain:

____

____

____

____

For Office Use

Details of Follow-Up:

____

____

____

____

Party Member Responsible for Follow-Up:

____

Session 8
Next Steps in Preparation: Analysis and Message Development

Objective:
1. Summarize what has been covered and introduce participants to the final steps in the preparation phase.

Time:
30 minutes

Process:
1. Review the material covered so far and how they contribute to preparing the campaign:
   - By creating Electorate Profiles, participants have a sense of what kinds of information they have and what kinds of information they have to find about the electorate where they will be campaigning.
   - Through Targeting, participants have learned what kind of voters make up their electorate based on voting history. They can now eliminate any D Poll areas and focus on areas where their base supporters and potential supporters are located. They now know where to look for more detailed information on what those voters think is important.
   - Based on the locations identified through Targeting, participants know where they should carry out Survey Canvassing to gather the detailed information that will help them develop their campaign message and verify information they may have already gathered for their Electorate Profiles.
   - Through the three preparation activities above, participants know what locations their campaign activities should focus on and what voters in those locations think.

2. The next two steps in the preparation phase will help participants develop clear targets in terms of how many votes they will need to win in specific locations (Vote Count) and create messages that will help them get those votes.

3. Do a round with participants. Ask: “What do you know about how to use your human, financial and time resources now that you didn’t know when this workshop started?”

☑

Trainer Tips

- This session gives an opportunity for participants to think about all the material covered so the trainer can clarify any points that may still not be understood.

- It is also an opportunity for participants to think about what they have learned in terms of how they will manage their limited human, financial and time resources.

Session 9
Vote Count

Objective:
1. Participants learn the technique of carrying out a vote count so that they know how many voters they will need to target in their campaign activities.

Time:
90 minutes

Materials:
- ⦿ Paper, calculators, Electorate Profiles from Session 4
- 🗋 Vote Count (9-1)

Process:
1. Have participants sit with the same groups as for Electorate Profiles and where they can see the results of the Electorate Profiles. They should have calculators to do their calculations.

2. The reason we do a vote count at this stage is so we will know how many voters we have to reach to confirm (for base voters) or try to convince to vote for us (for persuadable voters). It gives us real targets to reach through our campaign activities.

3. There are four steps in the process. We will go over each step together but each group should use the numbers from their selected electorate to do their calculations. (The numbers in the example below should only be used if real numbers are not available.)

4. *Step One:* Determine your starting point.

   Using information from the previous election, subtract the number votes not used at the selected location from the total number of registered voters at that location. Divide the total by the number of parties who got the most votes at that location. This will give you your starting point. If in the previous election, your party got enough votes to win, you could use this number as your starting point, assuming there have been no major changes in that location (e.g., fluctuations in population, changes in electoral boundaries).

Total registered voters:	119,426	
Not used: (13%)	-15,862	
Total	103,564	
Divided by 2 + 1	/2	
	51, 783	***Starting point***

   This example uses a two-party scenario to make the explanation simpler. In reality, there will almost always be 3 or more major parties and the calculation should reflect this.

5. *Step Two:* Analyze the impact of the electoral environment.

   There can be many conditions that will vary by location for every party/candidate and these can have a positive or negative impact on voters. In the selected electorate, do conditions favor the status quo or political change? Will your party/candidate's track record have a positive or negative impact? Each group should consider these issues for their selected electorate and decide whether the electoral environment is generally positive or negative for their party.

   Once groups have decided whether the environment is generally positive or negative, groups must consider how positive or negative the environment is: Do voters really favor your party or is their attitude more neutral? Are attitudes towards the party/candidate negative or are voters just more oriented to supporting another party/candidate. Groups have to rank the level of positive impact or negative impact as follows:

   Positive impact → minus 2%-10% of the Starting Point
   Negative impact → plus 10%-30% of the Starting Point

   For positive impact, groups should subtract their chosen percentage from their Starting Point. For negative impact, groups should subtract their chosen percentage from their Starting Point. Note that positive impact means less difficulty getting votes, and negative impact means more difficulty getting votes.

	51, 783	***Starting point***
Electoral environment Positive -10%	-5180	
	=46,603	***Subtotal 2***
Electoral environment Negative + 10%	+5,180	
	=56,963	***Subtotal 2***

6. *Step Three*: Analyze the impact of other candidates in your electorate.

   Now we have to calculate the impact of other candidates or parties in the selected electorate. Is your party/candidate historically popular in the selected electorate? Is this where you have a large base of support? Or is another party/candidate more popular? Groups should consider these factors and decide whether the impact from other parties/candidates is generally positive or negative. Again, choose from a range of percentages to reflect just how positive or negative the impact is:
   Positive impact → minus 2%-5% from Subtotal 2
   Negative impact → plus 2%-10% from Subtotal 2

   Remind participants that one can have any combination of variables between Steps 2 & 3, including a positive electoral environment and negative other candidate impact, or a negative electoral environment and positive other candidate impact.

	46,603	***Subtotal 2***
Other Candidate Impact Positive –5%	**-2330**	
	=44,273	***Vote Goal***
	56,963	***Subtotal 2***
Other Candidate Impact Negative +10%	**+5696**	
	=62,659	***Vote Goal***

   Now we have a preliminary vote goal. This is the number of votes a party/candidate needs to win on Election Day.

7. *Step 4:* Calculating the unpredictable.

   Because we cannot predict all the factors that affect voter turnout on a particular Election Day in a specific location, we use the "Rice Box Rule" to factor this in so our estimate of how many votes we need is realistic. Since all parties/candidates can be affected by the same unpredictability, we add 30% to our Vote Goal to reach our realistic estimate:

	44,273	***Vote Goal***
Rice Box Rule Positive scenario +30%	**+13,281**	
	57,554	***Realistic estimate***
	62,659	***Vote Goal***
Rice Box Rule Negative scenario +30%	+**18,797**	
	81,456	***Realistic estimate***

8. Distribute the handout Vote Count (9-1) and summarize. Calculating our vote goals for specific locations (electorates) gives us concrete information that we use to plan campaign outreach activities with real targets in terms of the numbers of voters we must try to reach.

9. Compare final vote goals with the real number of votes parties received in the previous election – how far apart or how close are these numbers? What does this tell participants about how their campaign will have to be carried out? How many persuadable voters will they have to influence to reach their vote goal?

☑

Trainer Tips

- Although the Vote Count calculation can be done in small groups, it works well to walk all the groups through the steps together with each using their electorate-specific data so they don't get confused.

- Give participants enough time to discuss and analyze the impact of the electoral environment and other parties/candidates. Make sure they are being realistic in their analysis.

- Emphasize that there can different mixes of positive and negative scenarios for the steps. The example above only shows both scenarios for each step as an illustration – for a real vote count, one must choose either a positive OR negative scenario for each step.

- Tell participants not to get discouraged if it looks like they have to find large numbers of voters. Knowing this information early will help them design campaign activities with real numbers of voters to target and help them assess the effectiveness of those campaign activities throughout the campaign.

9-1

Vote Count

1. **Examine the Electoral District** in terms of:
   - voting population
   - turnout history
   - number of likely candidates

   → **How many votes** will be needed to get the candidate(s) elected?
   → **This is your Starting Point**

2. Consider the **Electoral Environment**
   1. Does it favor the status quo or change?
   2. Does it help or hurt your candidate(s)?
   3. If it hurts, add 10%-30% to your Starting Point. If it helps, deduct 2%-10% from your Starting Point.

3. Consider the **Other Candidates**
   - Will they take votes from your candidate(s) or assist your candidate(s) by bringing out sympathetic voters?
   - If they will take votes from your candidate, add 2 %-10% to your starting point. If they will bring voters out for your candidate(s), subtract 2%-5%.

Starting Point
+
Electoral Environment
+
The Other Candidates
Your Vote Goal

Your Vote Goal
is an estimate of
the number of votes you will need for victory on Election Day

4. Add the **Rice Box Rule!**
   - Add 30% to your **Vote Goal** to make up for all the voters who will not make it to the polls or will not get to vote on Election Day for various reasons.

5. Look at what your **Targeting** has shown you.
   - Do you have enough voters in your base to get you to this number?
   - How many persuadable voters will you have to bring into your base to get you to this goal?

Tallying your Vote Goal will give you a very good sense of how much time you need to spend with your Base and Persuadable Voters.

Session 10
Message Development

Objectives:
1. Participants will learn the key criteria they must meet to develop effective campaign messages.
2. Participants will identify common perceptions held about their parties that should be taken into account for message development.
3. Participants will develop campaign messages.

Time:
2 hours

Materials:
- ✍ 6 Message Criteria (from Handout 10-2), Message Box (Handout 10-3), Message Triangle
- ⦿ Flipchart paper, markers, sticky dots in 5 colors, Message Triangle cards
- 🗋 What is a Message? (10-1), Message Criteria (10-2), Message Box Exercise (10-3)

Process:

Part 1 (20 minutes)
1. Distribute handout What is a Message? (10-1). Explain that:
   - A message is a **limited** body of **truthful** information that is consistently conveyed by a candidate or party in order to provide the **persuasive** reason for voters to **choose**, and **act** on behalf of that choice.
   - Clarify that a campaign message is different than a slogan. A *slogan* is usually a few words or a sentence that communicates a party's character in a catchy way. A campaign message is also concise but communicates key information about what a party will do if they are elected.
   - The target audience of the campaign message is primarily Persuadable and Base voters.
   - A campaign message DOES NOT try to reach out to an opponent's base – such efforts are not a good use of resources and create candidates that try to be all things to all people, thus giving the appearance that they stand for nothing.

2. Distribute handout Message Criteria (10-2). Review the 6 criteria (posted on flipchart):
   - **Context:** all campaign messages should be able to be used for any kind of communication in the campaign.
   - **Clear and Concise:** the language used should be easily understood by the target audience and should not be too long.
   - Compelling: campaign messages should be expressed in a way that makes the message appealing to the target audience.
   - **Contrasting:** campaign messages should differentiate the party's proposed programs from those of other parties.
   - **Connected:** campaign messages should reflect the interests of base and persuadable voters.
   - **Consistent:** the same campaign message should be communicated in all campaign activities and materials.

3. Ask participants if their parties have already developed campaign messages. Write any examples on the flipchart. Do they follow the criteria explained above?

Part 2 (30 minutes)

1. *Message Box Exercise:* This exercise will help participants clarify perceptions from within and from outside of their parties that may have to be countered through the campaign message. It is a “reality check” before participants develop their messages. Distribute handout Message Box Exercise (10-3) – the box should also be displayed on a flipchart or whiteboard.

2. Divide participants into groups of 4-5 people each, by party if this is a multi-party group. Ask each group to complete a Message Box. They should choose one opposing party only for the opponent’s parts of the box. Explain the box as follows:

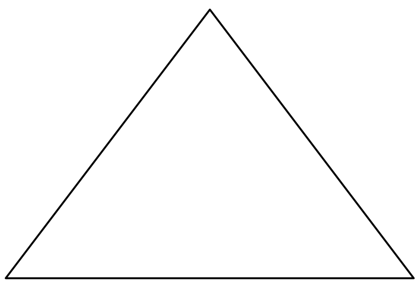
In this square, write words that *people in your party* (members, candidates, staff) usually use to describe **your own party**.	In this square, write words that *people in your party* (members, candidates, staff) usually use to describe **your opponent’s party**.
In this square, write words that *people in your opponent’s party* (members, candidates, staff) usually use to describe **their own party**.	In this square, write words that *people in your opponent’s party* (members, candidates, staff) usually use to describe **your party**.

3. Have groups present their results. What are the positive perceptions about their own party that they should try to emphasize through their campaign messages? What are the negative perceptions about their own party that they will have to counter through their campaign messages? What are the positive perceptions about their opponent’s party that they will have to counter through their campaign messages? What are the negative perceptions about their opponent’s party that they might try and take advantage of in their campaign messages?

Part 3 (30 minutes)

1. *Message Triangle Exercise:* This exercise will help participants deepen their understanding of how to develop a campaign message that meets the message criteria. Have the illustration below displayed on a flipchart and explain the 3 apexes of the message triangle:

The key point the message is trying to communicate



The way the message is expressed *The way the message is received*

2. Ask for 3 volunteers. Say that 2 volunteers will be shown a key point that a message might try to communicate and they will have a few minutes to write a message they think expresses the point on a card. These messages will then be shared with the other participants. The 3rd volunteer will be asked to say what they think the message is.

3. Give one message card to the first 2 volunteers and complete the exercise. Did the 3rd volunteer "get" the key point that was supposed to be communicated? How did other participants "get" the point? Continue with 2 more sets of volunteers.
   - Message Cards: (Message Cards can be adapted to the local context.)
     - The party will reduce corruption.
     - The party will increase employment.
     - The party will be fiscally responsible.

4. Debrief: Do participants understand that their campaign messages have to be specific about what the party will do about key issues? Were the messages expressed in a way that they were clearly understood? Did they meet the other message criteria?

Part 4 (40 minutes)

1. Have participants return to the same groups from Session 4 (Electorate Profile). Each group should develop one or two key messages they think should be communicated in their campaign. Remind them that they should be thinking about their target audience's interests in their selected electorates.

2. Have groups post their messages. Give each participant one set of 5 sticky dots (5 different colors). Each dot represents one of five Message Criteria (Context, Clear & Concise, Compelling, Connected, Contrasting → note that Consistent is not included because this is difficult to assess in a workshop context).

3. Each participant should stick their dots beside those messages they think best meet a criteria. For example, if a red dot is for "Compelling", they should stick their red dot beside the message they think is more compelling. If a green dot is "Contrasting", they should stick their green dot beside the message that most differentiates their party from other parties. In other words, they can stick their dots beside different messages.

4. Review how participants ranked the messages. Did some messages meet more criteria than others. Were there any that met all the criteria?

5. Remind participants of their vote goals. Would their messages attract a sufficient number of voters?

6. Think back to the different kinds of campaigns discussed in Session 2. Messages are important in all of these. What can we learn from the way messages are expressed in different kinds of campaigns, like advertising campaigns? Use the example of Features and Benefits from the handout Message Criteria (10-2). A feature is an element that an item for sale or political party has. The benefit is how that element is relevant to or affects the consumer/voter. Consumers and voters are not swayed by features but rather by the benefit of those features. For example, a salesperson for Volvo will be more successful selling a car by telling the consumer that it is "safe" than telling the consumer that it has "4 wheel assisted disc brakes with anti-lock braking system, an electronic brake distribution and drag coefficient of .28." Effective political messages refer to a party's policy or approach in terms of its benefits to voters, not its features.

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Trainer Tips

- Developing effective campaign messages is a key part of campaign preparation and usually a significant amount of party resources are devoted to message development.

- Keep the 6 Message Criteria prominently posted throughout the session.

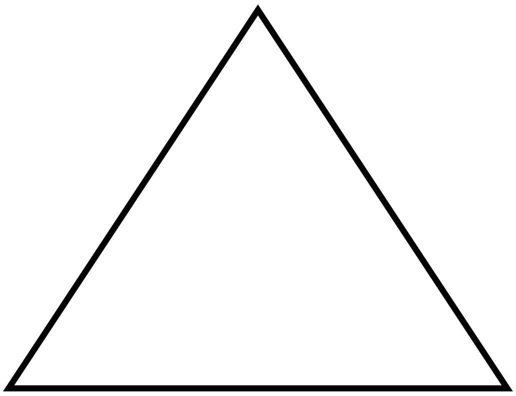
- Emphasize that the results of previous sessions provide important information about targeted voter characteristics and interests that should be used to develop campaign messages.

- It can be challenging to develop campaign messages that are both specific and appealing to diverse voters. Examine the messages developed and think about whether they could be used in different electorates.
- For women candidates, their message is an opportunity for them to take advantage of their difference from the majority of (male) candidates – in other words, differentiate themselves.

✍

Message Triangle

The key point the message is trying to communicate



The way the message is expressed ***The way the message is received***

10-1

What is a Message?

- A message is a **limited** body of **truthful** information that is consistently conveyed by a candidate or party in order to provide the **persuasive** reason for voters to **choose**, and **act** on behalf of that choice.

- The target audience of the campaign message is primarily Persuadable and Base voters.

- A campaign message DOES NOT try to reach out to an opponent's base – such efforts are not a good use of resources and create candidates that try to be all things to all people, thus giving the appearance that they stand for nothing.

Message Criteria

- **Context:** all campaign messages should be able to be used for any kind of communication in the campaign.

- **Clear and Concise:** the language used should be easily understood by the target audience and should not be too long.

- **Compelling:** campaign messages should be expressed in a way that makes the message appealing to the target audience.

- **Contrasting:** campaign messages should differentiate the party's proposed programs from those of other parties.

- **Connected:** campaign messages should reflect the interests of base and persuadable voters.

- **Consistent:** the same campaign message should be communicated in all campaign activities and materials.

Contrasting:
- Know your strengths and weaknesses
- Know the strengths and weaknesses of your strongest opponent(s)
- Determine your "mirror opposite" strengths
- Determine your "stand alone" strengths

Connected:
- Speak to the heart, the stomach or the wallet – focus on issues and language that have meaning in people's lives
- Keep it positive – people respond better to positive messages than to negative messages
- Limit points to 3 – your audience will forget EVERYTHING you've said after 3 points
- Keep language simple and targeted

Clear and Connected:

Look at your message from two perspectives:

FEATURE (PARTY PERSPECTIVE)	**BENEFIT** (TARGET AUDIENCE PERSPECTIVE)
Volvo: 4 Wheel Assisted Disc Brakes with Anti Lock Braking System, Electronic Brake Distribution & a Drag Coefficient of .28	Safe
Espresso Machine: Athena Coffee Maker	Makes delicious coffee
Macro-Economic Reform	More jobs

10-3

Message Box Exercise

How do you view your own party?	**How does your party view your opponent's party?**
How does your opponent's party view themselves?	**How does your opponent's party view your party?**

DAY THREE

Theme:

Going Public with the Campaign

Sessions:

Strategies for Working with Media
Planning and Implementing Outreach Activities
Developing a Campaign Plan
Building a Campaign Team
Personal Coping Skills
Final Evaluation and Closing

Session 11
Strategies for Working with Media

Objectives:
1. Participants will learn basic skills to work with media during the election campaign and improve their presentation.
2. Participants will practice being interviewed by media.

Time:
2 hours

Materials:
- ⦿ Paper, pens, highlighters
- Video camera and tripod, video monitor
- Preparing for Media Interviews (11-1), Interview Preparation Guide and Checklist (11-2), How to Give Great Media Interviews (11-3), Self-Evaluation Following Media Interviews (11-4), Image and Presentation Worksheet (11-5)

Process:

Part 1 (30 minutes)
1. Distribute handouts Preparing for Media Interviews (11-1), Interview Preparation Guide and Checklist (11-2) and How to Give Great Media Interviews (11-3). Explain that all participants will have the opportunity to be interviewed and to interview in a mock interview situation. Each interview will only be 2 minutes long. Review the key points in the handout Preparing for Media Interviews (11-1).

2. Each participant should complete the Interview Preparation Guide and Checklist. Ask them to think about the messages they have developed and to remember who their target audience is (base and persuadable voters). Remind them they will only have 2 minutes to get their points across.

3. Each participant should also prepare 3 or 4 questions to ask when they are playing the role of media interviewer. These should be written on a piece of paper.

Part 2 (60 minutes)
1. Have each participant in turn be interviewed by another participant for 2 minutes. Each participant should be given one opportunity to be interviewed and one opportunity to interview.

2. Participants not active in the interview should watch the monitor and take note of these points:
   - Did the interviewee get her point across?
   - Who was controlling the interview?
   - How was the interviewee's body language?

3. Once all the interviews have been done, discuss what those watching the interviews observed. How did participants feel when they were being interviewed – what was hard, what was easy? Remind them that the key to success is practice, practice, and practice. Our goal is to repeat our message regardless of the questions asked.

4. Distribute the handout Self-Evaluation Following Media Interviews (11-4) and have participants complete it. Ask them to think about what they need to improve to help them give more effective interviews.

Part 3 (30 minutes)

1. Distribute the handout Image and Presentation Worksheet (11-5). Divide participants into pairs. Have each pair complete the worksheet, listing each item in detail (color, other descriptive characteristics).

2. Post the worksheets and review results. Are there a lot of similarities? Differences? Do participants feel certain things are more important than others?

3. Summarize by emphasizing that personal presentation, particularly for women, can be judged very harshly during an election campaign and so adequate steps should be taken to avoid an image that could be judged negatively.

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Trainer Tips

- Set up the room so that the area where the interviews take place is not visible from where participants sit at the video monitor.
- Test the equipment before the session begins to work out any technical difficulties.
- When participants are preparing their interviews, circulate amongst them to make sure they keep focused on communicating their message and not just reacting to questions they are asked.
- Prompt participants to prepare really hard questions to ask when they are role-playing as interviewer – the kinds of questions they would worry about being asked!

11-1

Preparing for Media Interviews

General interview guidelines

The following recommendations are general hints that will give you the tools you need to succeed in most interviews. Going through these steps in a mock news interview setting will help you prepare for the "real thing." (A mock news interview is when someone acts as a reporter and asks you questions that a "real" reporter would ask. You may wish to videotape the mock interview so you can review and critique your performance.) The interview skills described in this section pertain to all forms of media unless otherwise noted at the end of the sentence.

Preparation

- Prepare two to three ideas you want to convey. These are your communication points, the three most important issues or points you hope to address and get across to the reporter during the interview.
- Note your key message. Plan to use it.
- Make a list of the questions you anticipate being asked. Anticipate issues and questions that may arise during the interview, and be prepared to use those issues to launch your communication points.
- Know your subject matter well.
- Have your best answers ready.

Simplicity

- Make short, simple, and specific statements.
- Explain your most important point first.
- Don't stray from the topic.
- Summarize and then elaborate. Example: "We have the best organization in the area because our volunteers really care. Let me explain what I mean…."

Answering questions

- Pause after complete statements. The interviewer will appreciate these breaks during the editing process. **(Radio and TV)**
- When you think you've answered a question adequately, don't feel compelled to keep talking simply because the interviewer has a microphone up to your mouth. If you're satisfied with your answer, sit in silence. Rambling leads you to say the wrong thing.
- Do not say the reporter's name in the middle of a sentence; do not use the phrase "as I explained earlier." Example: "We got all of our information in March 1999, *John,* and *as I explained earlier,* this will back up our first estimates." The reporter's name and the phrase *"as I mentioned earlier"* will be difficult to edit. Also, viewers may not know what you and the reporter have discussed previously, and may not understand what you are referring to. **(Radio and TV)**
- Think before you speak. Avoid fillers such as *uh, ah, well, yeah,* and *you know.* **(Radio and TV)**
- Respond to negative questions with positive responses.
- **Always** tell the truth. Your credibility is crucial.
- Avoid "**off the record**." If you say something to a reporter, expect that it will end up in print. If you don't want it printed, don't say it.
- Avoid "**no comment**" answers. It sounds as if you have something to hide.

2. The games interviewers play
Some interviewers can become hostile; others are just uninformed. Don't get caught in an emotional or intellectual game with the interviewer. Following are some "interviewer types" and question traps and some responses you may want to try.

Interviewer types

Machine Gunner. Asks so many questions that you don't know which one to answer first.
> Response: "Well, Bob, you've asked several interesting questions. First, I'd like to address..."

Interrupter. Jumps in before you've had a chance to complete your response.
> Response: Let him complete the interruption, then say: "Before I answer that, I'd like to complete my thought."

Paraphraser. Tries to put words in your mouth; e.g., "Do you mean to sit there and tell me there's no problem with..."
> Response: "No, Sarah, that isn't what I said. What I said was..." and repeat your point.

Unprepared Interviewer. May have vague questions or require you to provide a lot of background before you can get to your key message.
> Response: Take the opportunity to steer the interview in the direction you want to go. Rephrase the question to make it more specific. "By your question, I think you're referring to...let me put that in perspective."

Strategies for handling question traps
- **Either/Or**. When the answer is not "black or white," say so.
- **Absent Party**. Don't get trapped into being a spokesperson for another individual, business, or organization or into criticizing an absent person or organization.
- **False Statement.** Correct incorrect information immediately. Don't repeat the misinformation; this only reinforces it.
- **Hypothetical**. You do not have to answer a question that is hypothetical or conditional. It presents a scenario that never occurred.

3. Let's talk
For any recorded interview (radio or television), the impact of your **spoken message** depends on how you say it. The sound of your voice determines how well you hold the audience's attention.

The ability to speak well can be cultivated through practice. Common voice problems involve pitch, rate, and articulation. The habit of inflecting up at the ends of sentences and phrases is a pitch problem. Making everything you say sound like a question undermines your authority. You will sound more assertive if you lower your pitch and inflect downward.

Do you talk too fast or too slow? The speed that you talk is your speaking rate**.** While sprinting through your message may leave listeners behind, talking too slowly may bore them. To find out if you need to slow down or speed up, try this: Record yourself talking with someone, preferably in a "mock news interview" situation. Play it back and listen to how fast or slow you speak. Practice establishing a rate that is easy for people to understand. Once you've established a good pitch and rate, practice varying them, along with your volume, to add emphasis and expression to your message. Without variety, your voice becomes boring. You will make a better impression on your audience if you articulate, distinctly speak words.

4. Appearance is everything

Television viewers will judge your trustworthiness by your message’s substance and your style. However, your appearance also must match viewer expectations. Following are a few do’s and don’ts for dressing for success in a TV interview.

Clothing (in a studio setting)

- Stick to a conservative, "professional appearance" style.
- Wear a tailored sports coat. **(men)**
- Skirt length should be appropriate -- no mini-skirts. **(women)**
- Wear tan or black hose. **(women)**
- Avoid tight stripes or plaids. On camera, they sometimes produce a moving "zebra-stripe" effect.

Clothing (in an "on-location" setting)

- Dress in "natural" clothes. You are not expected to wear a suit if you’re being interviewed in a peanut field or a citrus grove.
- Avoid hats. If you <u>must</u> wear one, push back the brim so people can see your eyes.

Jewelry

- Wear only a few pieces.
- Avoid "clunky" or dangling jewelry. Big gold or high-gloss pieces can reflect studio lights.
- Short necklaces are best. Long necklaces rub against clip-on microphones.

Make-up

- Aim for the "natural" look. A woman’s "every day" make-up should be fine.
- Use a matte finish to reduce shine (this includes lipstick).
- Be sure your nails are manicured.
- **<u>Men</u>**: Most likely, you will not have to wear make-up, but be open to the suggestion. The lighting at some television stations may cause you to look washed out; therefore, you may need make-up to highlight your facial features.

Enthusiasm

- Be animated. Use gestures, facial expressions, and body language to add vitality to your words. However, be careful not to overdo it.
- Smile. A good first impression can help establish your credibility.
- Be conversational.
- Say it in 30 seconds or less.
- Deliver your message with confidence. After all, you know more about the story topic than the interviewer.

Body language

- Look at the <u>interviewer</u>, not the camera. Glances up or to the side make you appear shifty-eyed and untrustworthy.
- Sit still in your chair. Rocking or swiveling can take you out of a cameraperson's shot.
- Don't look at notes during an interview, although you can refer to them if you get "stuck."
- Stay seated when the interview is over. You might still be on camera and trip over a wire or do something else awkward.

Other warnings

- Don't chew gum or play with your pocket change or keys while on television.
- Never wear black or white for television interviews. Aim for midtone colors. Dark- or bright-colored clothes can make your face look extremely washed out or dark under television studio lighting.

- Your blouse/shirt should have a place to clip a microphone.
- Don't wear light-sensitive glasses. Studio lighting will make your glasses darker; viewers won't be able to see your eyes.

5. Nerves of steel

You are now ready for radio and television interviews. You are prepared, you look great, and you are ready to go. You arrive at the station on time, and then **"IT"** happens. You realize YOU will be the one in front of the microphone or camera. Your palms sweat. Your stomach churns. What are you going to do?

Stage fright is not a fatal disease. Just remember that we never look as nervous as we feel. With a few tips, you can overcome your fears and give a successful interview.

- **Be organized and concise.** Read over your material in advance to keep from sounding strained and awkward.
- **Concentrate on the question you're being asked**. Pause before answering a question just long enough to formulate an outline of the answer.
- **Before the interview starts, take a deep breath, get a drink of water, laugh or yawn**. Why yawn? Because you can't yawn and be tense at the same time. Even a nervous laugh to yourself will help relieve tension.
- **Remind yourself that you were asked to be interviewed because you're knowledgeable on that subject**; you're the *expert*.
- **Prior to the interview, review taped performances of yourself to identify presentation strengths and weaknesses**.
- **Be sure the TV station has your proper name and title**. Seeing either item appear incorrectly on the TV screen can throw you off guard.
- **Try to convince yourself you're having a normal everyday conversation with someone**.
- **Prepare your voice before the interview**. Many people are self-conscious about the way they sound. One way to lessen this fear is by relaxing your throat with a glass of lemon and hot water before leaving your house. Also, certain foods and beverages coat your throat, causing difficulty in swallowing and speaking. Before the interview, stay away from such things as cola drinks, chocolates and milk and milk products. It takes several hours to "uncoat" your throat from these products.

In addition to the suggestions above, you may wish to use this checklist to make sure you have everything covered before the interview:

- Are you familiar with the show or publication?
- How will this interview be used? Are you the only source, or one of many?
- Will this interview be live or taped? Will there be call-in questions?
- If this is a television interview, are you ready to make your appearance? What will you wear? What about use of makeup, visual aids?
- Have you developed a conversational style that will work under fire?
- Have you rehearsed all possible questions and answers with someone else?
- Can you explain your communication points in a concise manner?
- Have you prepared notes for your own reference?
- Do you have a few transitional statements?
- Are you prepared to answer questions **without** resorting to "no comment"?
- How many ways can you restate your key messages?
- Are you aware of your body language and facial expressions?
- Are you ready to present your message in an honest, effective way without industry jargon?

After you have been interviewed, you should evaluate how well you did before you do another interview. Here are some questions you may wish to ask yourself to evaluate your interview skills. **Did you:**

- Communicate your objective?
- Create soundbites (short quotations)?
- Keep control of the interview?
- Remain calm?
- Listen carefully to questions?
- Bridge from hostile or irrelevant questions?
- Use short, succinct sentences?
- Maintain credibility?
- Keep good eye contact with the interviewer?
- Control body gestures -- use hand motions appropriately, stop that shaking leg?
- Project a strong, positive image of a person people would trust?

Final helps
By following these final **"Be Attitudes,"** you should be successful in any interview setting:

- **Be prepared.** Prepare in advance two or three key ideas you wish to get across. Anticipate key issues that will come up during the interview and be prepared to use those issues to launch your objectives. Think of questions you would ask.
- **Be positive**. Turn negative questions or statements into positive responses. End every answer on a positive, upbeat note.
- **Be honest**. Always tell the truth. If you don't and try to bluff, it will show. Your credibility is crucial.
- **Be brief.** Crystallize your ideas into a few short phrases that summarize what you're trying to communicate.
- **Be yourself**. Keep your voice at an even pace. Act naturally.
- **Be energetic.** Be animated. Use gestures, facial expressions and body language to add vitality to your words. (Just don't overdo it.)
- **Be focused.** Direct your full attention on the interviewer. Look squarely at the person asking the questions. Don't be concerned with distractions.
- **Be comfortable, confident and take charge.** Relax. You know more about the story topic than the interviewer. If not, you wouldn't be interviewed.

From: *Media Interview Skills, Media Relations Training, University of Florida (http://mediarelations.ifas.ufl.edu)*

11-2

Interview Preparation Guide and Checklist

- **Write down the topic** that is to be covered on the top line of *the **Interview Preparation Guide***.
- Determine your **communication points**. What three ideas do you want to get across to the reporter? Write these on the **Interview Preparation Guide below.**
- List **three possible questions** a reporter might ask. Be sure to **prepare answers** to these questions. Write questions and answers on the ***Interview Preparation Guide***.

Topic:____

Your Communication Points

1 ____

2 ____

3 ____

Possible Question	Your Response (Soundbite)
1.	1.
2.	
3.	

Interview Checklist

______ Are you familiar with the show or publication?

______ How will this interview be used? Are you the only source, or one of many?

______ Will this interview be live or taped? Will there be call-in questions?

______ If this is for a television interview, are you ready to make your appearance? What will you wear? What about use of makeup, visual aids?

______ Have you developed a conversational style that will work under fire?

______ Have you rehearsed all possible questions and answers with someone else?

______ Can you explain your communication points in a concise manner?

______ Have you prepared notes for your own reference?

______ Do you have a few bridges or transitional statements?

______ Are you prepared to answer questions **without** resorting to "no comment"?

______ How many ways can you restate your key messages?

______ Are you aware of your body language and facial expressions?

______ Are you ready to present your message in an honest, effective way without industry jargon?

🗋 11-3

How to Give Great Media Interviews

How many times has a reporter interviewed you? And how many of those interviews did you live through? The good news: media interviews are rarely hazardous to your health. The bad news: simply living through a media interview does not make you an effective spokesperson. Fortunately, with some effort and practice, you can learn the skills you'll need to become a more confident, powerful media ambassador for your organization.

Effective spokespeople have learned several insider "tricks of the trade." These allow them to:

- Treat every media interview as an opportunity to communicate their messages to their target audiences;
- Further their agency's mission and educate reporters on their key issues;
- Think like a reporter and anticipate the questions a reporter will ask;
- Turn every interview into a mutual dialogue, not a one-sided interrogation; and
- Give quotable quotes-often!

Prepare

Before you ever conduct an interview, identify the three core "messages" about your organization or issue that you want to communicate. For example, "Our agency fights for access to affordable, quality health care for people with epilepsy. People with epilepsy are our friends and neighbors. They deserve and need better health care services." Write down these messages, distribute them to key spokespeople in your organization and review/update them often.

Effective spokespeople rarely conduct interviews "off the cuff." When a reporter calls, buy yourself some time by telling the reporter that you need to call him/her back. Find out the topic of the interview, when and where the story will appear (on an early morning radio program, in the morning newspaper or in an upscale monthly magazine), and his/her deadline. (While a reporter working on a breaking news story has an urgent deadline, most reporters have some flexibility.) Promise to call back within a short amount of time and keep your promise. But first, compose yourself, get a glass of water and prepare for the interview. Start by asking yourself these questions:

Why am I conducting this interview?

Be clear on what you want to accomplish by talking with this reporter. Do you want to increase awareness of your agency's efforts? Increase public support of issues your constituents care about? Influence pending or prospective health care legislation? Know your agenda. If you don't, only the reporter's goals will be met, and you'll likely be dissatisfied with the outcome.

Who is the audience?

Once you know in which news outlet the reporter's story will appear, make an assessment of its audience - what kind of people are likely to watch/listen to the program or read the newspaper/magazine - senior citizens? At-home mothers? Business executives? Then ask yourself, "What does this audience care about?" Be sure to refer to their core issues and values in your interview.

What do I want this audience to know/remember/do?

Repeat your key messages during the interview by weaving them into your answers. You probably will have a thousand things on your mind once you begin the interview, so stay focused by writing down your three key messages on an index card to keep with you during the interview.

What questions will this reporter ask?
What are your most effective answers to these questions? Identify and develop answers to the positive questions you'd like the reporter to ask AND to the negative, tough questions you hope are never asked. Also, identify the three top questions that you most want to answer because they give you an opportunity to articulate your key messages and success stories, e.g. "What is your mission?" "What obstacles to quality health care do your constituents face?" "Why is this legislation so important?"

Control the Interview
To level the playing field between you and the reporter, you must know your agenda and have the skills to meet your goals during the interview. The following techniques will help you maintain control and guide the reporter to the important information you want to communicate:

Bridging
This technique will allow you to maintain a dialogue with the reporter. There are two Bridging formulas: one for questions you like and another for questions you dislike:

Positive Questions: When the reporter asks you a positive, "friendly" question, *Bridging* helps you steer the conversation and pose a second, related question of your own.

Here's how it works:

A reporter asks you a positive question, such as "What is your mission?" You answer. Many spokespeople would stop here. But not you! You *"bridge"* to another question that you want to answer by saying, *"Another question your readers may be interested in is…"* Pose one of the questions you identified that allow you to state your message(s) and then enthusiastically answer your question.

Example:

Reporter asks: "What is your agency's role?"
You reply: "To improve our constituents' quality of life."
You Bridge: "Another question I'm often asked is 'What successes has your agency achieved?'"
You answer: "Our constituents now have access to…"

Negative Questions: All questions require an answer; however, difficult questions can be sufficiently answered with one word or a short phrase when you use the bridging technique. Here's how it works: The reporter asks you a negative question, such as, "Is your agency operating at a budget deficit again this year?" Rather than a full-blown answer, you may address the negative question with a succinct answer ("No," "Yes" or "I disagree" are favorites) and then bridge to a message that you want to communicate.

Example:

Reporter asks: "Aren't you just wasting time and money fighting for this funding?"
You reply: "No."
You Bridge: "The more important question is 'Why is this funding a sound investment in our children's future?'
You answer: "Let me explain…"

Hooking
This technique forces reporters or their listeners/viewers to listen to more information than they expected. When asked a question, you "hook" them by stating that you have two or three key points to share and then enumerate each point as you make it, such as "the first point is… the second is… etc."

Flagging
You "flag" a question by telling the reporter that the information you are about to share is important. Before you answer the reporter's question, you verbally "flag" it by saying, "That's the most important question you've asked me" or "That's the smartest question I've ever been asked." Always use this technique when your answer to the question includes one of your key messages.

Educate

Remember, few reporters will be experts on your issues. They won't know your group's many acronyms or understand your agency's "insider speak." And, if the reporter doesn't understand what you're saying, there is little hope that his/her audience will understand. Worse yet, the reporter may get it wrong. You later can claim that you were misquoted, but guess what? Too late! You are responsible for ensuring the reporter "gets it." How? Translate the jargon. Practice explaining key issues in language that your high school-aged neighbor would easily understand. Be sure to send the reporter relevant fact sheets, charts and graphs that reinforce your messages.

Most of all, reporters want a good story that they can "sell" to their bosses. It is your job to give them those good stories - give them your insights and opinions, but also your passion and real-life stories about your constituents, such as the man whose life was saved by the defibrillator your agency fought to have installed in the airport.

You know the daily ordeals your constituents face. Make them come alive for the reporter. And be sure to communicate your passion for the work you do. You don't have to be theatrical - just make it easy for the reporter to share your emotion and commitment with his/her audience.

From: *Mary Balice, MSI Strategic Communications (http://www.viewsmakingnews.com/resources/media_interviews.shtml)*

11-4

Self-Evaluation Following Media Interviews

Did you:

_____ Communicate your objective?

_____ Create soundbites?

_____ Keep control of the interview?

_____ Remain calm?

_____ Listen carefully to questions?

_____ Bridge from hostile or irrelevant questions?

_____ Use short, succinct sentences?

_____ Maintain credibility?

_____ Keep good eye contact with the interviewer?

_____ Control body gestures -- use hand motions appropriately, stop that shaking leg?

_____ Project a strong, positive image of a person people would trust?

11-5

Image and Presentation Worksheet

What is overall image you want to present to the public? List the characteristics of this image:

How will you convey that image physically? Fill in the chart.

ITEM	DESCRIPTION	COLOR
Clothing		
Accessories		
Make-up		
Other		

Session 12
Planning and Implementing Outreach Activities

Objectives:
1. Participants will identify different kinds of outreach activities that will help them get their messages out to their target audience.
2. Participants will develop a program of outreach activities.
3. Participants will identify sources of volunteers to carry out outreach activities.

Time:
60 minutes

Materials:
✍ Outreach Activity Matrix, Volunteer Identification Matrix
⦿ Flipchart paper, markers, blank index cards, glue stick
🗋 Outreach Activities (12-1), How to Get Out the Vote (12-2)

Process:

Part 1 (15 minutes)
1. Give a blank index card to each participant. Ask them to write one kind of outreach activity they have used to reach out to voters in the past on the card.

2. Post the cards. Explain what hot and cold outreach activities are:
   - Hot activities are those where there is the most immediate (direct) contact with targeted voters, therefore an opportunity to hear back from the voter.
   - Cold activities are those where there is no direct contact with targeted voters and where there is little or no opportunity to hear the voter’s response.

3. For each posted card, ask participants to call out whether they think the activity is “hot” or “cold”. Mark those that the group thinks are “hot” with a red marker and those they think are “cold” with a blue marker.

4. Explain that most campaigns use a mix of hot and cold outreach activities, but hot activities usually have the greatest impact in terms of influencing how people will vote. Some activities that are usually considered “cold” can sometimes be “hot” depending on the context. For example, while outreach via television is usually considered cold, a televised debate between key candidates can often be hot, especially if there is a studio audience or phone-in questions and comments from viewers.

Part 2 (25 minutes)

1. Have participants return the same groups as in Session 4 (Electorate Profiles). Distribute handouts Outreach activities (12-1) and How to Get Out the Vote (12-2) which they can refer to for ideas that may help their discussions.

2. Display the Outreach Activity Matrix and review. Groups should complete the matrix for as many activities that they can think of for their selected electorates, taking into account the local context and their targeted voters in that electorate. Groups should write up their matrix on flipchart paper.

Type of outreach activity	Type of voter (A, B, C) the activity targets	How many voters will be reached through the activity	Where the activity will take place	How many people will be required to implement the activity	Budget	When the activity will be implemented

Part 3 (20 minutes)

1. Have participants reconvene. Display the Volunteer Identification Matrix. Referring to the numbers of people required to implement each activity in their Outreach Activity Matrix, have groups complete a Volunteer Identification Matrix.

Outreach activity	Where potential volunteers can be found to help with activity	How potential volunteers wil be contacted in the identified location	How many potential volunteers will be contacted
Example: Survey Canvassing			
Example: Distributing Campaign Literature			
Example: Administrative Tasks			

2. Review group results briefly. Are the numbers of voters targeted similar to the numbers required as indicated by the groups' respective Vote Goals? Can they get enough volunteers to implement their planned activities?

☑

Trainer Tips

- The information in Outreach Activity Matrix will be integrated into the campaign plan.
- This session will remind participants that they have limited human, financial and time resources; they should be realistic in terms of how many and what kinds of activities they can implement.
- Remind participants that Survey Canvassing is the key form of outreach activity.
- Sometimes volunteers are not commonly used in the local context. However, it is important that parties take some steps to utilizing volunteers as this has many benefits in terms of maximizing limited time and engaging more supporters in campaign activities which helps build their base of support and increases credibility with the electorate.
- Women candidates may have access to special interest groups (women's centres and advocacy groups) that may be a potential source of volunteers willing to help with their campaigns.

✍

Outreach Activity Matrix

Type of outreach activity	Type of voter (A, B, C) the activity targets	How many voters will be reached through the activity	Where the activity will take place	How many people will be required to implement the activity	Budget	When the activity will be implemented

✍

Volunteer Identification Matrix

Outreach activity	Where potential volunteers can be found to help with activity	How potential volunteers wil be contacted in the identified location	How many potential volunteers will be contacted

Outreach Activities

“Hot” Activities

- Door to Door Canvassing with candidate or party official is the activity with the greatest impact
- Door to Door Canvassing with party members and supporters (volunteers)
- Small, personal events such as coffees
- Rallies and larger, energizing events but only when well-organized and unique

“Cold” Activities

- Literature Distribution with no Personal Contact
- Most Television and Radio Ads*
- Most Television Debates and Roundtables*
- Mail and Leaflets
- Visibility Events
- Posters and Billboards

**can be warm or hot in some political cultures*

Remember:

- The more personal the contact, the more high-impact it is.
- The activities with the highest impact also tend to be the most inexpensive, requiring more human than financial resources.
- Cold activities should not be avoided but their limited impact should be planned for.

Types of Canvassing

<u>SURVEY</u>

- Takes place between elections
- Objective is to:
  → Identify issues
  → Identify base and persuadables
  → Demonstrate activity and engagement

<u>ELECTION</u>

- Takes place during an official campaign, usually in “blitz” fashion
- Objective is:
  → Straight persuasion
  → Getting out the vote (GOTV)

12-2

How to Get Out the Vote

Objectives

Build an awareness of the power of voting

- Increase full participation in our democracy
- Promote specific issues, causes or candidates

If you are a grassroots activist, candidate, campaign manager, or a concerned citizen, one of the biggest hurdles is getting out the vote. In 1996, only 49.1 percent of registered voters actually went to the polls. In l998, that statistic dropped to 36 percent. Votes count. You need to build strategy to get out the vote.

Step 1: Register Voters

In order to get your votes, the first step is making sure you or your organization has registered voters. Thanks to the National Voter Registration Act of 1993, registering voters should be more convenient than in the past. Most states will allow citizens to register to vote by mail and will accept a universal voter-registration form. The form can be obtained from:

- **Selected Web sites**, including federal and states' sites
- Local town halls
- Local libraries

The federal law, sometimes called the "motor voter" law, also requires states to make registration forms available in public agencies such as departments of motor vehicles or social services.

Step 2: Narrow The Net

It would be great if all eligible citizens would vote. But a Get Out the Vote Strategy concentrates on people who will vote for you or your cause. All municipalities or county seats have lists of registered voters. You need to obtain these lists and begin making phone calls to determine:

- Who is a voter
- How each voter plans to vote (Ask politely, as many people consider this an inviolate area of their privacy!)
- If supporters can get to the polls, or need rides, and
- If supporters need to obtain absentee ballots

You should also call to remind your supporters where and when to vote.

Step 3: Get People To The Polls

On Election Day, getting your supporters to the polls can be accomplished by:

- Organizing rides for the disabled
- Contracting buses to take voters to and from the polls
- Creating neighborhood carpools
- Designating a telephone number on your campaign literature for voter transportation

If you are affiliated with a political party, the organization should assist you with these tasks.

Step 4: Make Voting Personal
Many people in today's frenetic world feel disconnected from the people and institutions that govern them. They often lack information about issues and candidates and therefore choose not to vote. Your job is to empower people with information.

According to a longtime politician, "The only way to get people out to vote is to give them solutions to problems that are right in their very own backyard." The idea is that if you can attract voters with local or personal issues, they will become interested in other levels of government; "bottom up" instead of "top down." A good resource on this subject is Back of the Yards: "The Making of a Local Democracy," by Robert A. Slayton.

Based on this theory, the most likely voters will have:

- Contact with candidates, political parties, family or peers who encourage participation
- An understanding of the impact that the election will have on their daily lives, and
- Available information about the candidates, issues and the nuts-and-bolts of the voting process.

Step 5: Keep Voters Hooked
Once you have your voters registered, information on getting to the polls and a clear, personal message, your GOTV strategy needs to include:

- Press releases to local and statewide newspapers
- An organized letter-writing campaign to local and state-wide newspapers
- E-mails to targeted audiences
- Reminder **telephone calls** from lists of registered voters
- Mailing of campaign literature
- Door-to-door delivery of your message
- Attendance at meetings of various groups in your community (i.e. Parent Teacher Association, or the Junior League)
- Placing of signs around town with date and locations for voting

Step 6: Go Door-To-Door
What gets people to vote? The single most powerful incentive is to be asked by someone they know. So a good plan for getting out the vote must include making friends. Lydia Carmarillo, executive director of the Southwest Voter Registration Education Project says, "The first time we visit a household, we see little to no change in voting behavior. The second time, we see a 20 percent increase. The third time, a 50 percent increase. And the fourth, an 80 percent increase."

Going door-to-to door is an excellent way to disseminate information, tell people where and when to vote, provide absentee ballots and to make yourself or your issues known throughout the community. Keep in mind that voting is a fun, social activity and should be encouraged.

Good luck!

From *Be Fearless, Fearless Act Kit (http://befearless.blackhammer.com/features/actkit_02.html)*

Session 13
Elements of a Campaign Plan

Objectives:
1. Participants understand the components, function and importance of a written campaign plan.
2. Participants develop campaign calendars.

Time:
60 minutes

Materials:
- ⦿ Flipchart paper, markers, Outreach Activity Matrix (results from Session 12)
- 🗋 The Campaign Plan (13-1), Campaign Calendar Template (13-2)

Process:

Part 1 (15 minutes)
1. Distribute handout The Campaign Plan (13-1). Explain that a campaign plan:
   - Is a management tool.
   - Provides quantifiable means of measuring progress (or lack of progress).
   - Keeps campaign teams focused on their goals.
   - Keeps a campaign pro-active instead of reactive, even in the face of disaster.

   A campaign plan is not a plan unless it is written down!

2. Review the components of a campaign plan. These are:
   - Research
   - Message
   - Budget
   - Timeline
   - Vote Goal (Election Day Goal)
   - Team Organization
   - Communications/Media Strategy
   - Calendar of Activities

   We have already covered research, message, vote goal and some aspects of communications/media strategy. This session will focus on making up a calendar of activities.

Part 2 (45 minutes)
1. Have participants return to the same groups as in Session 4 (Electorate Profile) – each group should have its Outreach Activity Matrix at hand.

2. Distribute the handout Campaign Calendar template (13-2). If available, post any pertinent dates related to local election laws (deadlines, blackout periods, etc.). Each group should complete their Campaign Calendar for 3 months leading up to Election Day.

   Instruct groups to work backwards from Election Day, marking in any pertinent deadlines by which certain activities must be completed. They should schedule in all their preparatory and research activities in a logical sequence as well as any planned outreach activities. Ideally, activities will be happening on a daily basis and the groups' calendars should reflect this.

Groups should keep these points in mind to keep their calendars realistic and focused on the ultimate goal of getting enough votes to win on Election Day:

- What methods will be used to communicate with voters?
- How many voters do you need to reach?
- How much time do you have? How early should you begin these activities?
- How many party supporters and volunteers will be needed?
- What are the challenges that will slow down your efforts: holidays, infrastructure, rural vs. urban areas, insufficient activists to do the work, major sports events, etc.

3. Review the results. Are the calendars realistic? Are all key dates and activities included? Do participants feel they can implement all the activities on their calendars?

☑

Trainer Tips

- Prepare a list of relevant dates related to election laws and any other dates that should be taken into account in calendars for posting or as a handout.

- Modify the handout Calendar Template (13-2) to reflect the real months/dates involved in the local context.

- This is an opportunity for participants to integrate much of what they have learned. Circulate among groups as they do their calendars to make sure they haven't forgotten to schedule in times to do their electorate profile, targeting, survey canvassing, vote goal and message development activities.

- During the review of group results, check for logical consistency – for example, they should be doing targeting before survey canvassing (in order to know where they should be focusing survey canvassing activities).

🗋 13-1

The Campaign Plan

A campaign plan:

- Is a management tool.
- Provides quantifiable means of measuring progress (or lack of progress).
- Keeps campaign teams focused on their goals.
- Keeps a campaign pro-active instead of reactive, even in the face of disaster.

Components of a Campaign Plan:

- Research
- Message
- Budget
- Timeline
- Vote Goal (Election Day Goal)
- Team Organization
- Communications/Media Strategy
- Calendar of Activities

A campaign plan is not a plan unless it is written down!

13-2

Campaign Calendar Template

Month 1:						
Monday	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*	*Sunday*
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Month 2:						
Monday	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*	*Sunday*
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Month 3:						
Monday	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*	*Sunday*
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24 /31	25	26	27	28	29	30

Session 14
Building a Campaign Team

Objectives:
1. Participants create job descriptions for a campaign team.

Time:
30 minutes

Materials:
- ⦿ Paper, pens
- 🗋 The Campaign Team (14-1), Job Description Worksheet (14-2)

Process:
1. Distribute handout The Campaign Team (14-1) and review the members who make the team:
   - Campaign Manager
   - Communications Director
   - Election/Legal Agent
   - Field Director
   - Scheduler
   - Volunteer Coordinator
   - Fundraiser
   - Ward Captains
   - Election Day Manager

2. Distribute the handout Job Description Worksheet (14-2). Divide participants into groups of 3-4 people. Assign to each group one of the above job titles – if there are not enough groups for all the job titles, assign these job titles only: Campaign Manager, Communications Director, Scheduler, Volunteer Coordinator, Fundraiser (5 groups).

3. Each group should complete a Job Description Worksheet for their assigned job title.

4. Have each group present their Job Description in turn. Ask for feedback from other participants and have groups modify their job descriptions if necessary.

The Campaign Team

Members of a Campaign Team

- Campaign Manager
- Communications Director
- Election/Legal Agent
- Field Director
- Scheduler
- Volunteer Coordinator
- Fundraiser
- Ward Captains
- Election Day Manager

14-2

Job Description Worksheet

Job Title:

Major Tasks and Responsibilities:

-
-
-
-
-
-

Qualities:

-
-
-

Supervises*

**Other members of campaign team, if appropriate.*

Reports to:

Session 15
Personal Coping Skills

Objectives:
1. Participants will identify key stresses they face in managing family and campaign responsibilities and gender barriers they face in their parties.
2. Participants will identify some strategies to cope with their identified stresses and gender barriers.

Time:
90 minutes

Materials:
- ⦿ Paper, pens, flipchart paper, markers, crayons
- 🗋 Prioritizing Tasks (15-1), The Delegating Process (15-2), Secrets to Time Management in the World of Politics (15-3)

Process:

If possible, set up the chairs for the Consult Circle in Part 1 (Steps 6-11) ahead of time. See Trainer Tips for the way to set up chairs.

Part 1 (45 minutes)
1. Divide participants into triads (if the total number of participants does not divide equally, put 4 participants in one group). The process here assumes there are 24 participants (8 triads).

2. Ask each triad to take a few minutes to identify the 2 most difficult issues they experience in trying to balance their family and campaign (party) responsibilities.

3. Combine triads so that there are now 4 groups of 6 participants each. Ask these groups to share their 2 issues. Each group should decide which 2 of the 4 issues they think are the most difficult/stressful.

4. Combine groups of 6 so that there are now 2 groups of 12 participants each. Ask these groups to share their 2 issues and then pick 2 out the 4 issues they think are the most difficult/stressful.

5. Write the identified 4 issues on a flipchart. If all 4 are different, ask participants to decide which 2 they would like to discuss.

7. Have participants take seats randomly in the Consult Circle chairs – they should all have paper and pens. Explain that those sitting in the inner circle will be acting as "consultants" and those sitting in the outer circle will be those seeking advice. Assign one of the 2 identified issues to each Consult Circle.

8. Start the Consult Circle: each participant in the outer circle should seek advice on their assigned issue from the "consultant" they are facing. They should write down the advice offered.

9. After 3 minutes, stop the Consult Circles and ask those in the outer circles to move one seat to their right. They should seek advice from their new "consultant" on the same issue.

10. Continue the process -- stopping the Consult Circles and having participants in outer circles rotate one seat to the right – until participants in the outer circle seats have sought advice from all the "consultants" in the inner circle seats.

11. Re-assign the issues to the other Consult Circle. Repeat the process from Steps 8-10.

12. Have participants return to one large circle. Ask participants to share what kinds of advice they received and write these on flipcharts (one for each issue). Do participants feel they can use the strategies suggested? Which are particularly useful?

13. Distribute handouts Prioritizing Tasks (15-1), The Delegating Process (15-2) and Secrets to Time Management in the World of Politics (15-3). Explain that many of the common tensions women experience are often related to time management and delegation issues. Review the handouts – would addressing some of the issues raised help participants manage their family and campaign (party) responsibilities more effectively?

Part 2 (45 minutes)

1. Divide participants into groups of 5-6 participants per group. Give each group flipchart paper and crayons/colored markers.

2. Ask each group to think about this question together and create a drawing (they can use words too) based on their responses: "When I see, hear, feel these things in my party, I know that gender discrimination is happening". Explain that gender discrimination can include things that are reflected both in structures and attitudes (like stereotyping).

3. Have participants share their drawings: What are the common elements? What are the differences?

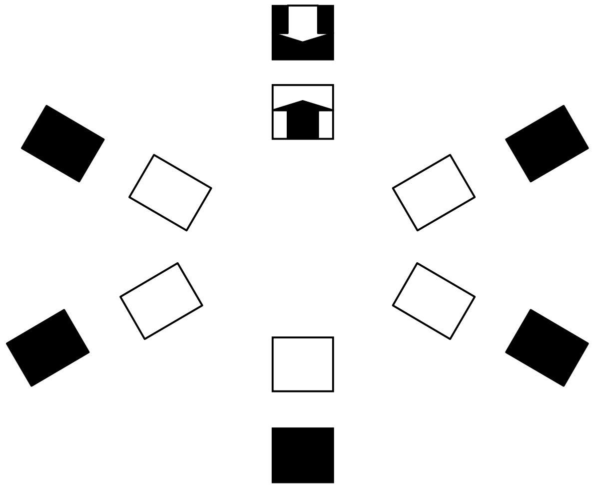
4. Ask participants to suggest strategies to deal with any of the issues that have been raised in the drawings. Write these on the drawing to which they relate.

5. Acknowledge that there are some gender discrimination issues that are not possible to resolve at an individual or organizational level. However, naming these issues and realizing they are experienced by others can help us cope with their effects.

☑

Trainer Tips

- Set up chairs for the Consult Circle as follows. The black squares represent chairs in the outer circle and are facing in (for those seeking advice). The white squares represent chairs in the inner circle and are facing out (for those acting as “consultants”). Make two circles.



- The Consult Circle is an exercise that most participants find energizing. However, do not let each round of consulting go longer than 5 minutes. Move people more quickly if it seem like their discussions are moving off topic.

- Let participants know that they don’t have to be artists to create their drawings – encourage them to mix words, symbols and pictures. They can use color to express emotions.

- Make sure all participants in groups participate actively in the drawing – with flipchart paper, more than one participant can be drawing at a time.

15-1

Prioritizing Tasks

Ask: Is this task important?
Does completing this task help me to reach a goal?

Ask: Is this task urgent?
If I don't do this task now will there be negative consequences?

Always consider how long it will take you to accomplish a specific task.

1. Important/Urgent
Crises
Pressing Problems
Deadline-driven projects
Elections!
Votes!
Some Constituent Needs

2. Important/Not Urgent
Preparation
Planning
Goal Examination/Clarification
Building Relationships
Needed Relaxation
Knowledge Improvement
Other People's Priorities
Some Constituent Needs
Media Relations

3. Not Important/Urgent
Needless Interruptions
Unnecessary Reports
Unimportant Meetings
Phone Calls and Email
Other People's Minor Issues
Irrelevant mail

4. Not Important/Not Urgent
Trivial, Busywork
Unnecessary Phone Calls
Time "Wasters"
"Escape" activities
Irrelevant mail
Excessive relaxation

Once you have sorted your tasks by priority, determine if there are any you can purge from your schedule, i.e., delegate, find a shortcut for, or even delete!

15-2

The Delegating Process

1. Examine the task. Is this a task that is repeated often or a onetime special project? The frequency and complexity of the task suggest whether it is worth spending time training someone to do the job.

2. Determine who is the best person to do the job. Do you need an expert, an equal or a beginner? Is there someone who might enjoy doing this task? Have a sense of the individual's capabilities and willingness to perform the task.

3. Clearly communicate the objective. Do not assume that the individual knows everything you know about the task. Invest in training time if necessary.

4. Clarify the quantitative and qualitative requirements – make clear how many you need and what it should look like.

5. Set a clear due date, and schedule interim dates to check on progress if necessary. Be available for questions and consultations while the job is being done.

6. Establish a relationship of understanding. Delegating is about teamwork, not autocracy.

7. Review and evaluate the result. Determine whether the desired result has been achieved. If not, reflect on the individual's skills and your own ability to communicate the task effectively. Talk with the individual about what he/she has done well, suggest improvements and, if appropriate, let the individual resolve any outstanding problems.

8. Celebrate success!

15-2

Secrets to Time Management in the World of Politics

1) When writing the timeline for your campaign plan, start from Election Day and work backwards.

2) Post a calendar of objectives, activities and deadlines where all key staff and volunteers can see it (but not necessarily the press). Put up a clock in the main work area where everyone can see it.

3) Don't be afraid to delegate! If you're concerned that no one else can do a job as well as you, you aren't managing effectively.

4) Prepare and plan for meetings – have a clear objective and start and end on time. Be conscious of wasting other people's time.

5) Meetings are about dialogue and discussion – not speechmaking! Moderate meetings to prevent long-winded diatribes, and suppress the urge to offer one yourself.

6) In a campaign, spend 10 minutes every morning going over the day with your key team members. When running a regional campaign, get all your key people from the region together once a week.

7) Save small talk for the cafe!

8) In a campaign, set the ground rule that no one is allowed in the campaign headquarters until it's too late to knock on doors – all volunteers and staff should be out talking to voters until then.

9) Take care of the big stuff first, then worry about the small stuff, i.e., don't worry about what the campaign buttons and signs will look like when the campaign plan isn't written yet.

10) Win or lose an election, never forget to thank volunteers and party members who helped in the campaign. It's the right thing to do and will bring them back to help again.

11) Remember that politics is a marathon, not a sprint. Avoid making decisions that will hurt you in the long-run.

12) Be ruthless with time and gracious with people.

Session 16
Final Evaluation and Closing

Objectives:
1. Assessment of participants' grasp of workshop material.
2. Participants evaluate their experience of the workshop.

Time:
30 minutes

Materials:
🗋 Campaign Skills Quiz (16-1), Evaluation Form (16-2)

Process:
1. Distribute the Campaign Skills Quiz (16-1) and have the participants complete it. Explain that results will be compared with their responses to their Participant Pre-Workshop Assessments to evaluate how effective the workshop has been in increasing their knowledge of campaigning.

2. Do a round and ask participants to share one thought that they will carry to inspire themselves during the campaign.

3. Distribute the Evaluation Form (16-2) and have participants complete it before they leave the workshop room.

☑

Trainer Tips

- Following the completion of the workshop, review participant responses to the Campaign Skills Quiz and compare with their responses to the Pre-Workshop Participant Assessment. Analyze to assess how successful the workshop has been in increasing participants' knowledge.

- If possible, share your analysis with individual participants to let them know how much they have learned.

- Use the feedback in Evaluation Form responses to help improve the workshop and to plan future activities with the same group of participants or their parties.

16-1

Campaign Skills Quiz

Participant Name: ______________________________

1. Please list at least three important things to remember when developing a campaign plan.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

2. When you develop a "message" for the campaign – the things that make a candidate special, or why voters should vote for a candidate, what should you emphasize? Please, list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

3. Please list at least three important things to remember when preparing a speech to give to a group of voters.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

4. What methods can you use to convince voters to vote for you during the campaign? Please list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

5. How would you advise a woman who wanted to become a candidate on how to get nominated by her political party? Please list at least three suggestions.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

6. If you were assisting a candidate running for office, what would be the most important advice you would give her as she developed her campaign? Please list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know
7. What are the three main community issues in your district?
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know
8. If you were helping a candidate to develop her campaign "message", what would you suggest that she emphasize during her speech to convince voters to choose her as a candidate? Please list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know
9. What would be three important suggestions you would give to a women candidate preparing to make a speech to a group of voters?
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know
10. If you were giving information to a candidate about the election law, what would be the most important things that you would tell her to remember? Please list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know
11. What methods should a woman candidate use to convince voters during the campaign? Please, list at least three.
   a) ______________________________
   b) ______________________________
   c) ______________________________
   d) Don't know

16-2

Evaluation Form

Participant Name: ____

1. Of the material covered in this workshop, which will be particularly useful to you? Please list.

____

____

____

2. Of the material covered in this workshop, which will be not very useful to you? Please list.

____

____

____

3. What kind of methods used in this workshop did you find most effective? Please list.

____

____

____

4. What kind of methods used in this workshop did you find least effective? Please list.

____

____

____

5. Was there anything in this workshop that had a negative impact on your ability to fully participate? If so, please explain.

____

6. What other kind of skills or knowledge would you like to develop to help you as a woman politician?

____