

THE CAMPAIGN TEAM

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For the purposes of this handbook, “campaign team” refers to all those who help organize your efforts. It is made up of the committee, the treasurer, your volunteers, and each of the individual teams that oversee a portion of the campaign. Your media team, for example, may have a liaison to the campaign committee, but it should be viewed as part of your overall campaign team rather than part of the committee itself. Aspects of the campaign team will be covered in this chapter. Campaign efforts that involve large numbers of people and independent efforts, such as lawn sign activities, media projects, brochure development, and fund-raising, will be covered in separate chapters.

The Campaign Committee

The relatively small campaign committee serves two functions: First, it is a support group, both for itself and for the candidate or issue-based campaign; second, it is the primary source of expertise for the campaign. This small, select group will maneuver and steer a campaign while drawing on the

resources of the community. The committee should consist of individuals who have different personal strengths and areas of ability.

Your campaign committee is an insiders' group. The candidate, the manager, and each of the members must feel safe in speaking candidly without fear of recrimination. Treat them like insiders and keep them informed of

any campaign development. You would never want a committee member to first learn about a problem with the campaign in the newspaper or through the rumor mill. Call or e-mail your committee members often. Welcome their criticisms.

Encourage them and support their indi-

vidual efforts in the campaign. Listen carefully to determine when they might need additional help. Be clear about their tasks, expectations, and time commitment.

Take time in choosing the right number of people for a campaign committee. I have worked on countywide campaigns with four committee members (including the candidate), which was too few, and citywide campaigns with twelve members, which was too many. I have found that six or seven committee members for a city with a population of up to 20,000 is perfect. In countywide campaigns a successful committee might also include members from each city who oversee teams within their respective cities.

You want only enough committee members to cover the campaign activities that you have decided to do. Keep in mind that not all campaign activities occur at the same time, so it is often possible to have more than one task assigned to a single committee member. For example, the campaign brochure is written and printed at the beginning of the campaign, whereas the demands on the canvassing coordinator are greatest toward the end of the campaign. On the other hand, fund-raising responsibilities and clerical team coordination are both ongoing tasks and should *not* be combined with any other campaign responsibilities.

Once the campaign starts, meet with the committee each week for one hour. For citywide campaigns where people are not traveling great distances, it isn't a bad idea to meet in the evening after 8:00 P.M., when children have been taken care of and the day's work is done. Up to a point, the later you meet, the better, because people are ready for their day to be done, so they arrive on time and get right down to work. Few people function well after 10:00 P.M., so at 9:30 be ready to call it quits. Try to keep committee meetings to one hour unless it is the first meeting and you're setting up the campaign. For this first meeting, allow additional time by starting the meeting earlier,

or have the meeting at a different time—for example, set up a morning retreat followed by a lunch at which the campaign becomes official. For countywide campaigns, it works well for the committee to meet in a central location at the end of the workday before dinner.

Campaign Committee Packets

Your committee may quickly break down into specialized campaign functions. Once specialized groups are formed, keep track of their progress by getting reports back each week. When the committee meets, meetings should be productive. Always have an agenda. It is important that all meetings begin and end on time.

A campaign committee packet (figure 1.1) is a great organizational tool for committee members. (The finance committee packets, discussed in Chapter 4, are assembled in a similar fashion.) Each pocket folder contains tiered sheets of alternating colors organized by category for the tasks the committee will undertake in the course of the campaign, such as lawn signs, canvassing, phone banks, letters-to-the-editor, and so on. Although one sheet should be dedicated to listing committee members and all contact information for each, the remaining sheets clearly outline job descriptions for each campaign duty and indicate who will oversee that particular job. The folders travel with committee members to war room meetings and contain information that may be distributed there. Helping volunteers with this kind of organizational framework keeps members happy and makes your campaign a little more volunteer friendly.

In addition to the weekly meeting for the full committee, occasionally get together with the individuals who are responsible for specific campaign tasks, and bring this information back to the committee. For example, you may meet with the ad person to hammer out two or three ads and then bring these to the regular committee meeting to have them critiqued.

Other than the treasurer and the campaign manager, the makeup of the campaign committee is discretionary, based upon how many people will be needed to plan and supervise the campaign. You will depend on the people you invite to join your campaign committee, so they should be capable of organizing and directing some particular aspect of the campaign. In addition to a treasurer and a campaign manager, your committee must include one or more people to oversee letters-to-the-editor, canvassing, clerical work, brochures, the media, lawn signs, phone banks, fund-raising, getting out the vote, and volunteer workers.

"The impersonal hand of government can never replace the helping hand of a neighbor."

—Hubert Humphrey

"The time to win a fight is before it starts."

—Frederick W. Lewis

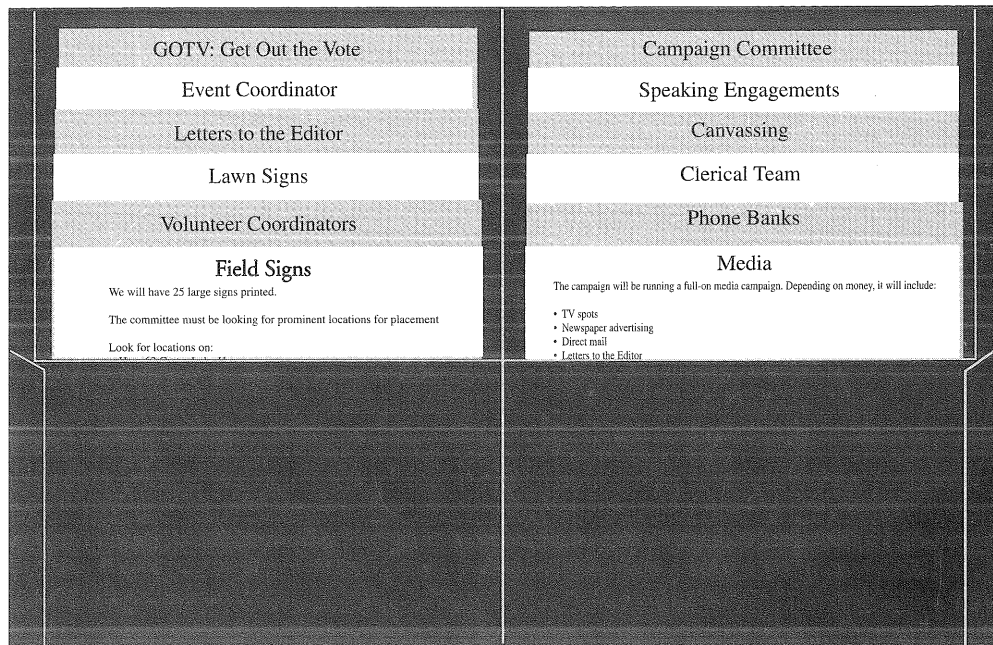


Figure 1.1 Example of a Campaign Committee Packet

The Treasurer

I usually ask a volunteer to serve as the campaign treasurer. I look for someone who is well respected in the community and who will lend credibility to an issue-based campaign or balance a candidate campaign. Selecting the right person for this position is one of the most important things you will do. The name of your treasurer will appear on every campaign publication. He or she will be called from time to time by the press, or even the opposition, and asked questions. Like a vice-president in a presidential election, the treasurer should balance the ticket. For example, if you are a retired senior, select a prominent, involved, young person of the opposite sex. If you are a young progressive man and relatively new to your community, consider an older conservative woman who has been in town a number of years. Find a person who complements rather than merely repeats your strengths. If you're a Democrat, find a respected Republican. If you are working for more taxes for

schools, get someone who is conservative and who may have sometimes spoken out against tax increases.

If possible, find someone willing to represent the campaign, discharge the official duties of treasurer, and help in other ways. For example, a treasurer may take on all thank-you notes and keep donor files up-to-date in a database. In one campaign I managed, the treasurer sat in on war room meetings, canvassed, helped with lawn signs, and oversaw data input on campaign donations, but this level of involvement by the treasurer is the exception and not the rule.

"If you want something done, ask a busy person."

—Benjamin Franklin

The treasurer is usually responsible for obtaining and completing the registration forms required for participation in an election. The necessary forms can be obtained from the city recorder's office for city races, from the county clerk's office for county races, and from the election division under the secretary of state for elections to state offices. Don't be afraid to use these offices. The people who staff government offices are extremely helpful and accommodating.

Not all the forms and information in the election packet are necessary or applicable to every race or election. Ask exactly what you need to read, what is required, and when it is required. Ask either the clerk or the recorder for a schedule of the pertinent dates for filing your campaign contributions and expenditures. While the filing of these reports is the principal job of the treasurer, it is a good idea for both the candidate and the campaign manager to be aware of them. These tasks should be placed on your campaign flowchart, calendar, or plan as a reminder.

"Making the simple complicated is commonplace; making the complicated simple, awesomely simple, that's creativity."

—Charles Mingus

Finally, I now also use a certified public accountant (CPA) in all campaigns. If I can't find one who will volunteer to oversee the reports, I use campaign funds to hire one. Having a CPA on board is actually a great comfort to the volunteer treasurer and helps reduce the overall stress of a demanding campaign cycle. The CPA and the treasurer should work together closely.

Contributions and Expenditures

Your treasurer and the CPA should be sticklers for detail. The opposition will be examining your contributions and expenditures (C&Es) filings for any

mistakes to report to the state elections office. If a mistake is found, it is bound to make the local papers. That sort of damage is totally preventable.

After the C&E forms have been filed, local papers generally do a story on who spent how much on what. If you are running a modest campaign and your opposition is funded by outside money, make sure that information makes it to the media. Running a visibly hard-working campaign with modest funds gives people the sense that you are fiscally responsible. That trait is desirable in office, and people will make the connection.

Although it is difficult to work on a campaign where the opposition has unlimited funds, it can also work in your favor. In a small community election that involves no TV ads, there is just so much ad space to buy in the newspaper and just so much direct mail that can be sent to homes without it becoming pretty clear that the election is being bought. In one campaign I ran, we were outspent five to one by the opposition, and we publicized this spending discrepancy to our advantage. When the newspapers ran the usual C&E article, many in the community were stunned by the amount of money coming in from outside interests. Since we had a pretty good idea of how much they were spending, we were ready when the press called for our reaction. Supporters wrote and sent letters-to-the-editor for those who missed the newspaper articles when they first appeared.

In that particular race, the opposition was convinced that the accounting in our campaign was wrong and sent people to the recorder's office on a regular basis to check our C&Es. This is where having a meticulous treasurer pays off. Finally, convinced of foul play, the opposition called the paper and suggested there must be something wrong. When the press called me, I explained that we were in fact spending a normal amount for a small-town race and it was the opposition whose expenditures were excessive. We got another great newspaper story.

Committee to Support

Given the importance of a good treasurer, what do you do if you can't find the right one for you? Not to worry. You have two options. First, you can place a short list of carefully selected supporters (six to nine) at the bottom of all your literature and ads. This "Committee to Support" should represent a good cross-section of the community. Although some of these people might be working on your campaign, this is not your "campaign committee." The primary job of this group is to give your cause credibility by lending their names. Depending on the issue, the "committee to support" may include people in business, environmental groups, real estate, labor, and so on.

Using a "committee to support" works well if you have broad-based support up front; however, it does not work at all if your support is marginal. I once worked on a campaign that was so controversial that I could get only three people to sign their names to the committee-to-support list. Rather than have such a short list, which didn't cover the political spectrum of the city, I dropped the notion of listing the committee. In fact, it helped the campaign to discover the level of controversy so early in the campaign. Information of this sort should not discourage, but rather help set the course.

Let me caution you here. When you are working on a very controversial campaign and have a listed "committee to support" at the bottom of all your literature, you take the risk of opponents to the campaign getting to one or more of those who are listed and undermining your public support. The newspapers also may call these people and grill them on the cause. This can get a little dicey. I find it best to use a "committee to support" for relatively unknown candidates or difficult yet uncontroversial initiatives or measures such as school or public library funding.

"Putting a bunch of people to work on the same problem doesn't make them a team."

—Gerald M. Weinberg (*The Psychology of Computer Programming*)

Another option you have if the "perfect" treasurer cannot be found is to simply press on. Look for someone who is thorough, honest, easy to work with, trustworthy, and committed to your cause or candidate. Talk to your personal accountant or the person who prepares your taxes. CPAs have great community credibility, and they may be willing to provide report preparation on a pro bono basis or at a reduced rate.

The Campaign Manager

The campaign manager is the single most important position in a campaign. Where other jobs have finite responsibilities and time commitments, the job of campaign manager is open-ended. It is a lot to ask of anyone, especially on a volunteer basis. For this reason it is usually the first and sometimes the only paid position.

"Even the highest towers begin from the ground."

—Chinese saying

A campaign manager will interact with your volunteers more than any other person in the campaign, so good communication skills are a must, especially phone skills. The duties of the campaign manager vary greatly, depending on the number of individuals working in the inner circle. In general, he or she will do such things as attend coffees, debates, and events with the candidate and

set up sign-in sheets while lending moral support. The campaign manager also *must* give candid feedback to the candidate without being indelicate.

If you are running a countywide partisan election campaign, having a manager is critical. You need someone to oversee it all and to be a source of support for the candidate. If you're working on an issue-based campaign, you can serve as the campaign manager with the use of this handbook. Although I believe it is a mistake to run for office without a campaign manager, if you are running for office in a small city, you can probably get away with it. Whether you're serving as your own campaign manager or have hired one, you still need capable people to head up various campaign tasks such as lawn signs, canvassing, and letters-to-the-editor. The most effective campaign teams are those with volunteer team members supervised by a strong manager.

Potential Sources for a Campaign Manager

I highly recommend teachers as campaign managers. They are generally smart, organized, articulate, and personable. They are able to speak to large groups of people and ask for things in simple, understandable ways. They tend to know computers, have a nice collection of presentable clothes, work hard, and are generally politically savvy. They are also likely to be available all summer. If you choose wisely, a teacher who is a campaign manager will force you to get everything ready during the summer so that your fall campaign will go much easier. The drawback of using a teacher is that he or she may be overwhelmed with school responsibilities in the fall and less available to the campaign.

Other potential sources for campaign managers are development directors for local charities, private schools, or nonprofit organizations. These people might consider short-term work for a candidate, and they will have a proven track record. Other leads: people who have worked on other political campaigns, for a United Way campaign, or for a Heart/Lung Association fund drive; and those who have organized local parades, 4-H fair shows, concerts, or county fairs.

In general, a good campaign manager is hard working, organized, intelligent, self-confident, and loyal. And, because appearance is important, this person should reflect the values and style of the candidate or campaign.

Maintaining Control

Recently I was an adviser to a campaign where the manager became problematic; he was parking illegally on city-owned land and then hassling the police with a "do-you-know-who-I'm-working-for?" attitude. To make mat-

ters worse, volunteers were complaining to the candidate about the campaign manager being unnecessarily rude. The candidate was at the end of his rope and called me to help find a way to let this volunteer go.

Although a candidate does not need this kind of stress, firing a volunteer manager can bring more headaches than it cures. So short of firing the manager, what can the candidate do?

First, the candidate always has the option of reorganizing the campaign so that the "manager" has less involvement and responsibility. Second, the candidate could deal with the campaign manager and the situation in a clear and straightforward manner. He or she could kindly explain how others were interpreting the manager's actions and how they were reflecting negatively on the campaign and the candidate. Because campaign managers are so closely affiliated with the candidate, there is an assumption that their activities are condoned by the candidate. A problematic situation like this must get immediate attention. Campaigns not only allow the community to see how a candidate will perform both publicly and under pressure but also allow the candidate to get some experience in dealing with awkward situations and people. Once in office, difficult people materialize all the time. If none of this works, the volunteer must be fired.

"We've run into a couple of problems, but nothing minor."

—Brenda Collier

When running for state legislative office, be prepared to pay the campaign manager handsomely. A good manager will bring many skills to the table and can mean big money to your campaign. Individuals, organizations, political action committees (PACs), and lobbyists want to contribute to "winning" campaigns, and your manager is a big indicator. A strong, experienced, well-organized, hardworking manager will bring an air of confidence to a candidate and campaign team. A candidate should listen to the campaign manager and follow his or her advice.

Ten Tips for Campaign Managers

1. Know the budget and have control of the checkbook.
2. Allow only one person to do scheduling for the candidate. This must be someone who works well with the candidate and is highly organized.
3. Manage the team/consultants and monitor their progress.
4. Hire professionals to develop campaign literature and television/radio spots.
5. Be positive, supporting, and encouraging to the candidate.

6. Raise money—lots and lots of money.
7. Loyalty is more important than experience.
8. Never waste donors' money.
9. Be organized.
10. Do not waste volunteers' time.

The Campaign Chair or Co-Chairs

When working on an issue-based campaign, the messenger is the message. Who heads it up is therefore directly linked to the success of the campaign. Here you have the choice of using either one person serving as a campaign chair or two people serving as co-chairs. Campaign chairs should be noncontroversial leaders in your community and may either serve in “name only” as a figurehead or as the actual campaign co-coordinator. Mostly they are the face of the campaign. They meet the media, they are part of the war room, and they work the endorsement circles of the community—the Rotary Club, the Chamber of Commerce, business leaders, and more. They gain power and stature when they seemingly have nothing personally to gain by the passage of the measure. So avoid using someone as a campaign chair who has a vested interest in the outcome of a campaign, such as a county commissioner for a county tax base.

Choose your co-chairs carefully. Well-respected community leaders with a strong community network are best. Their community relationships are part of the network the campaign will lean on

“Loyalty is more important than experience.”

—Bill Meuleman

to raise money and activate volunteers. They should balance each other, in gender and in interests. For a county measure, one may be from the rural area with ranching or farming ties, the other from the city with business ties. Selection of your chair or co-chairs is completely dependent on the ballot measure.

If the right chair or co-chairs cannot be found, don't use a campaign chair, but be sure to have top people able to respond to the press and willing to debate the opposition.

Finding Volunteers

Finding and directing volunteers is almost the same for each campaign task. Although the tasks vary considerably, only a small modification is necessary to organize your volunteer force for each specialized campaign activity.

Regardless of the activity, there are seven important things to remember about using volunteers:

1. Don't waste the volunteers' time. Have everything laid out and ready to go the moment they walk in the door. Begin and end on time. Do not encourage late arrivals by delaying the start of meetings.
2. Be prepared with anything they might need. If the task is to stuff envelopes, make sure there are enough stamps, sponges, pens, staples, and other necessities.
3. Call them ahead of time and let them know what they need to bring, such as extra staplers, clipboards, good walking shoes, a truck, etc.
4. Be clear about their tasks, expectations, and time commitments. Give clear written instructions and deadlines. This is especially important for those on phone banks.
5. Pick the right people for the job. Don't ask out-of-shape people to canvass hillsides with a 6 percent grade; don't place counterculture people as canvassers in conservative areas.
6. Keep volunteers informed, and support them. When you call, let them know how the campaign is going. Be sensitive to their schedules.
7. Treat your volunteers as you would highly paid employees.

It is a serious mistake to value volunteer time less simply because it is free. Disorganized campaigns lead to irritated and frustrated workers who may not return if things seem poorly run more than once. Some of the very best volunteers will not come back after even one bad encounter. To avoid such problems, the manager should assemble clerical teams to help set up other tasks, such as stapling lawn signs in preparation for the lawn sign team or looking up phone numbers for phone bankers. This preplanning is vital to creating a volunteer-friendly campaign, helps ensure the success of campaign activities, and allows the campaign to place people in jobs where they will work best.

Matching Volunteers to Skills

Although a small campaign can be run without volunteers, it would be a mistake to do so. When people work for a campaign, they become invested and want to see that investment pay off. Also, involving people in the process brings more interest to government and the political system. There is, however, one caution: If potential workers indicate an unwillingness to do a particular activity, don't make the mistake of begging and pleading to get help in that task.

“Nothing is particularly hard, if you divide it into small jobs.”

—Henry Ford

I once placed a woman on the phones who told me she didn't like to phone. I found it hard to believe that in this day and age anyone would have

trouble talking on the phone—plus I was desperate. What a mistake. She was painfully uncomfortable calling people she didn't know and projected a poor image of the campaign. I couldn't take her off once I saw my error, because that would have called further attention to the problem, making her more uncomfortable. I left her on the phone for about a half hour and then told her that I had finished my work and asked if she would mind if we shared her

"In life, as in any game whose outcome depends on both skill and luck, the rational response to bad odds is to try harder."

—Marvin Harris

phone. She gratefully gave it up. Similarly, if a volunteer reports that he doesn't like to canvass, believe him. It is better for the campaign to have people doing tasks they enjoy.

Here is a tip for placing people who say they would rather not call or canvass:

Some who do not like to work phones actually do not like to make "cold calls"—that is, they do not like to call people who may be opposed to the candidate or measure. Quite often, these same people may be willing to make calls to identified supporters, such as in a get-out-the-vote effort. Similarly with canvassers, some do not like to canvass because they dislike knocking on doors and talking to the residents. However, these same people may be willing to do a literature drop, a door hanger, install lawn signs, or other tasks where knocking and talking are not involved.

Supervise volunteers so workers who do not do well on a task are not called a second time to help in the same task. For instance, if a volunteer is struggling at a phone bank, simply note it in the spreadsheet you use to keep track of volunteers or on the volunteer's 3-by-5-inch contact card (see Chapter 3, "The Volunteer Organization"), so that campaign workers will not mistakenly call the person again for that task. Similarly, if an individual is great at a task like phoning, keep him or her away from other campaign activities to avoid campaign burnout. Use volunteers where they excel.

The same kind of supervision is necessary for each volunteer activity. For example, if a canvasser returns without notes for lawn signs, no impressions of voter attitudes, and having only partially covered the assigned area, perhaps canvassing is not the best job for that person. Note this in the volunteer data system. Be sure to make a note as to why, and move that person over to something like lawn sign placement and maintenance. If it can be avoided, do not place volunteers in jobs where they will have a bad time or reflect poorly on the campaign. Attention to these kinds of details helps volunteers be more successful and keeps them returning to help in future elections.

Potential Volunteer Sources

Those involved in grassroots campaigning must find people willing to help. Finding volunteers can initially seem daunting, but remember, the only people you can be certain will not help you are those you do not ask. The following is a list of places to look:

- Your family, friends, and business associates
- Women's rights groups
- Former candidates, office holders, and their volunteers
- Local service groups
- Labor unions
- Teachers or school associations
- Any special interest groups dealing, for example, with the environment, human services, hunting, and fishing

In nearly every election there is an issue so controversial that voters will act solely on the basis of the opposing positions held by the two candidates. These issues create voters who become "ticket splitters" because they allow an issue to influence what would otherwise be a straight-line party vote. Issues that lead to ticket splitting can motivate a voter to work or vote *against* a candidate rather than *for* a candidate.

"Nonpolitical issues are the most political."

—Bill Meulemans

In general, issues that create ticket splitters can translate into both volunteers and money for your campaign. Here is a list of some groups and issues that are more inclined than most to let a single issue influence their votes:

- Veterans
- Sportsmen, fly-fishermen, and hunters
- Environmentalists
- Timber and logging advocates
- Choice
- Land-use advocates
- Seniors
- Tax and antitax groups
- Gay rights and anti-gay rights activists
- Public union employees
- Identifiable work groups such as teachers and firefighters
- Advocates for gun ownership

