



Campaign Planning Guide:

Campaign Basics

Every campaign has basic questions in common. The scale of the election will make the answers different, but the underlying functions of campaigns are similar from the smallest local election to the largest national race and require asking the following questions:

- How many people do we need to vote to win?
- Which voters do we need to communicate with to change their behavior?
- What messages do we need to deliver to impact that behavior change?
- How will we deliver those messages to the voters?
- What resources does the campaign need to get those messages out?

Things to Remember

- **Have a Plan and Write It Down:** The plan may change throughout the course of the campaign but having one and using it throughout the campaign is a must and will help you prioritize resources for the campaign.
- **Use Real Numbers:** Not “some,” “many” or “our voters.” A successful campaign needs actual numbers based on research and facts.
- **Work Backwards:** The campaign is most robust on Election Day; therefore, work backwards on the timeline. What is the scope of the organization you need to grow to be successful on Election Day? How will you build that over time?
- **Living Documents:** Campaign plans should change when circumstances change. Working off shared, online documents will help inform the campaign structure and ensure you are using time and resources in the most efficient way.
- **Voter Contact:** There are many ways to speak with voters about your campaign or issue. Some of these include phone banking, virtual townhalls, relational voter contact, TV, radio and direct mail. Not all voters will receive the same type of communication or the same message. Your mode of contact will depend on your campaign, your resources and the audience.
- **Focus on the End Goal:** Campaigns have limited resources. Activities and spending that don’t move the needle towards winning waste those resources. IAFF staff can help you separate effective campaign tools from the ineffective and make sure your time, money and volunteer resources are being used the right way.

Elements of the Plan

Calendar Guide

We recommend developing a centralized, shared calendar which captures all the important dates of your campaign. Make sure to consider the limits of your candidate's time and staff time.

The calendar should include all important dates of your campaign including special events, holidays, GOTV, financial reporting (before and after Election Day), filing dates, early voting, fundraising call time, communication plan, mailers, phone banking dates and everything else related to your campaign.

Voter Contact Plan

The Voter Contact Plan is how you plan to talk to voters and convince them to vote for you. This plan should include how many people you must contact to achieve your campaign win number and how many of those contacts you must persuade to vote for you.

- There are multiple phases during a campaign. **The first phase is the ID phase** where you will talk to voters on the phone to see where they stand at the beginning of the campaign.
 - » **The second phase is Persuasion**, where you will narrow your focus to undecided/independent voters and attempt to sway them to your side.
 - » **The final phase is Get Out the Vote**, or GOTV, where you take your identified and likely supporters and push them to cast their ballots. These phases and universes (lists of targeted voters) may look different for every campaign. Make sure to include these phases on your calendar once you have identified them to ensure they are completed in a timely manner. Make sure to include any early voting or vote-by-mail deadlines in your plan.
- **Your field plans need to have real numbers.** Not “some,” “many” or “our voters” – actual numbers based on research and facts. Here is how we calculate real numbers or “Voter Contact Math”:
 - » Use a voter file database like the Labor Action Network (LAN) to obtain previous election data. Depending on the campaign, you may be able to obtain a voter file database from your local or state party committee or the IAFF. Contact the IAFF for help with this.
 - » The voter file will contain prior election data to obtain your base vote estimate, persuasion universe estimate, GOTV/turnout universe estimate and criteria for each. *(For ballot measures, use context clues from polling and partisan landscape to find initial targets.)*
 - » Once you collect this data, you calculate how many votes you need from each universe to meet your win number.
 - » **Win Number:** The number you need to win. It's usually 50% + 1 but plan for 52% of the expected vote. Expected vote is a projection based on past behavior in similar elections.

- Once you have your real numbers, including your win number, develop your Voter Contact Plan. This plan should answer the following questions:
 - » How many staff do you need and when do they start?
 - » What are your total goals for volunteer contact? (i.e., how will you reach voters? How many times will you speak with them? How many volunteer shifts do you need?)
 - » How many IDs will be collected and how many contacts are needed for those IDs?
 - » What are the volunteer pools for volunteer recruitment? What is the message or strategy to recruit and retain volunteers?
 - » During this abnormal time, how are you going to ensure you are maximizing relational voter contact? Remember the goal is to ensure that you are exponentially increasing your voter network without having in-person conversations.
 - » What are the timelines for voter contact and outreach?
 - » What is the candidate's follow-up plan?
- Get Out the Vote or GOTV is the time leading up to Election Day. Your voter contact outreach will be its largest at this time. You are only talking to supporters at this time. When developing a GOTV plan, you should answer the following questions:
 - » Who are your targets? What's your message to the targets?
 - » How many voters are you targeting? How many passes on the phones will you make?
 - » How many volunteer shifts do you need to execute those attempts?
 - » Is Early Voting available in your area, and do you have a plan?
 - » Are your campaign messages echoing in all voter outreach platforms?

Communication Plan


A good communication plan will develop specific messages to ensure you are targeting the voters you're trying to reach where they get their information. This plan should include all earned media (e.g., newspaper op-eds) and paid media (e.g., social media ads).

Research can help inform your messaging platform. There are many different types of research, including research based on the candidate, the issue, election rules, donors and voter opinion.

Not all voters will receive the same treatment from your campaign. Targeting helps you choose the voters who are most likely to vote based on their history. Targeting can also determine who needs to be persuaded in your direction for your issue.

Your campaign message should include which messages you are delivering to voters, campaign issues you want to highlight and issues you want to highlight about the opposition. This is essentially what we want people to know and say about us. When developing your message, make sure to include the following:

- Develop a Tully Box to craft your campaign’s message.

 THE TULLY BOX	
What we’re saying about us	What our opponent is saying about us
What we’re saying about our opponent	What our opponent is saying about her/himself

- After using the Tully Box, a campaign theme usually emerges. Your campaign theme should be what you want your campaign to be about.
- You should know where your campaign messages come from and why you’re using them.
- Is the campaign about you or your opponent? How will you define the choice?

When developing your communications plan, strongly consider the following platforms to communicate your message with your voter universe (not in order):

Paid Media and Direct Mail

- What messages will you drive with paid advertising?
- Using the voter file, which voters are you targeting and over which communication methods?
- How much do these ads or mailers cost? How many times are your voters going to receive these types of media?
 - » TV/Cable
 - » Online Video Advertising
 - » Radio
 - » Direct Mail
 - » Banner Ads
- When are you executing the paid communication and why then?

Online Communication

- What social media channels will the campaign utilize? (e.g., Twitter, Facebook, Instagram, YouTube)
- Which groups will the campaign target on social media?
- How will the campaign grow their lists of connections on Facebook, Twitter, Instagram, etc.?
- How will the campaign make use of connections developed online?

Earned Media

- What are the best ways to communicate through earned media, i.e., newspapers, TV, radio, podcasts?
- What are the message points for each of these mediums?
- When is the best time to communicate on these platforms and why?

Fundraising Guide

Your fundraising guide should include your fundraising goal and how you will achieve this goal. For example, you should include fundraising call time, special fundraising events and any other means. For campaigns, you should do the following, if applicable:

- Develop a finance plan with real numbers on a spreadsheet.
- Aggregate all your contacts and network to that same spreadsheet and prepare a script with how you are going to ask them for money.
- Make sure to schedule call time and call time goals, i.e., how much do you need to raise during that call time in order to reach your overall campaign fundraising goal?
- Develop and track how you will raise money:
 - » Emails to family, friends, supporters and their networks for campaign contributions
 - » Special events, like virtual meet and greets, virtual townhalls, etc., with dates and a specific fundraising goal
 - » If you are allowed to, plan for federal, state and/or local PAC contributions and/or party committee contributions
 - » Online fundraising, e.g., setting up an ActBlue fundraising account, ads. Make sure to schedule these blasts or ad releases and create a specific fundraising goal for each one.
- Make sure you plan for who is responsible for financial reporting. Your campaign needs to follow campaign finance law and be timely with your reporting. These dates should be included on your campaign calendar.

Budget Guide

A good budget has expected expenses and tracks actual costs. Your budget should reflect every cost coming in or out and every anticipated expense related to the campaign. Make sure to include your fundraising goal and how you will achieve this goal. Here are some things to keep in mind:

- Develop a budget with real numbers on a spreadsheet and track expenses in real time.
- Don't forget to include costs such as overhead – rent, phone lines, website, etc.
- Be specific – exactly how much, when and for what quantity
- Prioritize spending on correct and efficient activities that make sense given your strategy, targets, and fundraising

Here are some items you might find in a campaign's budget:

- Staffing – manager, staff, etc.
- Voter contact – signs, stickers, shirts
- Paid media/online – TV/cable/radio ads, social media ads, mailers

Questions or Need Assistance?

If you have any questions or need help with your campaign, please reach out to the IAFF Political Department using our [online form](#) or email politics@iaff.org.