



Field and Canvassing Guide

The Field Plan is how you plan to talk to voters and convince them to vote for you. Having a field plan means talking to people directly – either on the phone or at their door – and tracking this information.

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. So why do we spend so much time developing a field plan?

- A field program delivers messages directly to the voter and lets them express an opinion or concern directly to your campaign. It's direct engagement and not passive engagement.
- This information helps decipher whether these voters support or oppose your campaign.
- Nothing else in the campaign builds to your win number. Field is the only way to have a real count of supporters.
- It's the most effective way to change a voter's behavior – and testing backs us up on that!

Prioritize Field

With field or direct engagement, make sure to ask the voters what they care about directly and immediately address their concerns and ask for their support.

- Record their initial opinions and try to persuade them to vote for the candidate or issue.
- Talking to people in person and on the phone is the only way to get a count of supporters. That's how to get to your win number.
- Dedicate time to list management. Otherwise you are wasting your time collecting IDs and persuading voters.
- Prioritize this part of the campaign. Planning to run for office? Maximize time spent talking face-to-face with voters.

Campaign Phases

There are multiple phases during a campaign. You don't know what a voter will do until you ask them. Make sure to ask for their vote!

You will be collecting the numbers of voters for each phase below. These different phases will identify and help get you to your win number.

- The first phase is the **ID phase** where you will talk to voters at the doors and on the phones 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.

Getting Started

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 what we call “Voter Contact Math”:

- Use a voter file database like the Labor Action Network or “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, and 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.

Path to Victory

When looking at the electorate for a specific election, you will need to split the voters into different targets or universes. There are three universes — persuasion, turnout and base — that you must collect information from to formulate your win number. These numbers should give you a “Path to Victory.”

- **Base universe:** People who are going to vote and will be voting for you.
- **Persuasion universe:** People who are likely to vote but are also undecided. Many are independents who you must persuade to vote for you.
- **Turnout universe:** People who will vote for you, but you must turn them out — often referred to as sporadic voters.

Calculating your Path to Victory is essential to your campaign. All your campaign decisions will be based on these numbers. For help with calculating your Path to Victory and win number, please request assistance from the IAFF Political Department using our [online form](#) or email politics@iaff.org.

Field Plan

Like everything on a campaign, field starts with research and a plan. Remember, the field plan doesn't have to be done all in one weekend. Field naturally builds over time. It all depends on the success of recruiting and retaining volunteers. Field plans need to answer the following:

- What is your win number?
- What is your Path to Victory? (persuasion, GOTV, registration, etc.)
- Who are your highest priority targets?
- What methods will you use to reach them?
- How many people do you need to have those conversations?
- How much will it cost and how long will it take?
- Working backwards from Election Day, how many times will you need to reach people and what methods will you use to reach them?
 - » For example: Want to canvass someone three times, then how long will that take? Want to call your entire set of voter targets three times, then how many volunteers will be needed? How much money will be needed to get paid calls?

Voter Contact Plan

Once you have your real numbers, including your win number, develop your Voter Contact Plan. This plan should answer the following questions:

- How many field staff do you need and when do they start?
- What are your total goals for volunteer contact (e.g., how many passes, doors versus phones, how many volunteer shifts do you need)?
- How many IDs collected, and contacts needed for those IDs?
- What are the volunteer pools for volunteer recruitment and what is the message or strategy to recruit and retain volunteers?
- What are the timelines for voter contact and outreach?
- Will the candidate be knocking on doors? How many? When? Where?
- What is the candidate's follow-up plan?

Get Out the Vote or GOTV is the time leading up to Election Day. Your field operation 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 doors/phones are you targeting? How many passes at doors/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 the field efforts and media?

Field: Pro Tips

- **Use real numbers.** Put in the work at the start to make sure the campaign is well-informed.
- **Work back from Election Day.**
- **Collect data** and make sure it's real data, not made up.
- **Prepare in advance.**
- **Empower volunteers and train constantly.** The more volunteers can do, the more time and money the campaign will have for other aspects.
- **Always keep resources in mind.** Where can you save? Where can you add?
- **Build over the duration.** Don't expect capacity to happen overnight.

Questions or Need Assistance?

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