

## Planning Your Campaign

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A political campaign is a significant undertaking that involves many people, events, and decisions. Waging a successful campaign requires organized leadership and careful planning. You will have to make a lot of decisions well in advance and prepare to respond to potential problems that may or may not arise.

For this reason, think through the important steps in the process, determine how you will allocate your key resources (time and money), delegate responsibilities for different aspects of the campaign, and have options ready when things do not turn out as planned. Your campaign plan should incorporate each of these elements.

## Getting on the Ballot

Take care to establish yourself as an official candidate before publicly launching your campaign. Even though the process is simple, waiting until the last minute to file your candidacy papers is a recipe for disaster. To ensure the viability of your candidacy, always pay close attention to the legal requirements associated with running for office.

### Know and Comply with Basic Filing Deadlines and Requirements

You will need to comply with two separate sets of legal deadlines: one for filing candidacy papers, and one for filing campaign contribution and expenditure reports (both are discussed in Chapter 8).

Do not rely on someone to do this for you. Know the legal requirements and keep track of them yourself.

■ **TAKE NOTE: Pay very close attention to deadlines.**

Failure to file complete candidacy papers on time can be fatal to your candidacy.

You can get copies of the election calendar, which has the filing dates relevant to the office for which you are running, from your local elections official or registrar of voters. The California Fair Political Practices Commission's Web site ([www.fppc.ca.gov](http://www.fppc.ca.gov)) has a calendar of filing dates for campaign finance reports. Local jurisdictions may have special election dates and special filing dates, so always check with your local elections official. You can find links to information about these deadlines at [campaigns.berkeley.edu](http://campaigns.berkeley.edu).

To be an official candidate for office, you will need to formally announce your intention to run for office by filing a Declaration of Candidacy and Nominating Petitions with your local elections official. Before you begin soliciting money for your campaign, you will need to file a Candidate Intention Statement (FPPC Form 501), which announces to the FPPC the name of the office you are raising money for. (See Chapter 8 for a detailed discussion of these and other legal requirements associated with running for office.)

Your Declaration of Candidacy and Nominating Petitions must be filed on time or your candidacy will be ended before it begins. The nominating petitions require signatures of support from registered voters in the jurisdiction where you are running.

Many potential candidates have been shocked when their candidacy papers were rejected as invalid because some of the signatures were from nonresidents or they did not meet other technical requirements. If that happens and it is too late for you to revise your papers in time to meet the filing deadline, you will be precluded from running for office.

If you file your Candidate Intention Statement (FPPC Form 501) late, you will be subject to a stiff fine, and you may have to return illegally raised campaign contributions, but you will be allowed to continue your candidacy.

■ **TAKE NOTE:** There are also restrictions on who can sign and who can collect signatures for you.

Not everyone qualifies as a collector! And not just anyone can sign your candidacy papers!

## Developing a Campaign Plan

The best way to make sure your campaign runs smoothly is to do as much planning in advance as possible. Successful candidates typically write a full campaign plan before they begin and regularly refer to it to measure success and make adjustments as the campaign progresses. Planning entails more than simply writing down a list of goals. Decide how to allocate your time, money, and other campaign resources and identify ways to implement your key objectives.

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## ■ **ADVICE FROM PROFESSIONALS: “Planning to Win: Strategic Thinking for Local Elections,” by Mary Hughes**

Football teams have playbooks; symphonies have scores; start-up companies rely on a business plan. So it follows that candidates for public office need a strategic plan that charts a path to victory.

Too often, local candidates fail to write down their research and conclusions in a plan. Writing the rationale for the candidacy, evaluating the constituency’s voter history, assessing “the numbers” needed to win all provide a solid basis on which to decide how a campaign will win.

“It’s up here,” says the manager, pointing to his head. “Too much to do,” says the candidate, anxious about fundraising.

Big mistake.

A good strategic plan focuses scarce resources efficiently and eliminates efforts and expenditures that don’t yield votes.

As important, it’s fun.

Campaigns for local office rarely have the resources to do polling or to hire message mavens or media consultants. But by asking and answering basic questions, local candidates can design and execute a solid strategic campaign plan with the same precision and clarity that marks a winning (and expensive) campaign for Congress.

How will we win? What will we do? The answers to these questions form the core of a strategic plan. The strategic (not including structure or operations) elements of a Campaign Plan for local office are:

- **Contest, Context, and Climate**
- **Candidate, Voters, and Vote Trends**
- **Competitive Advantages**
- **Message, Voter Communication, and Field**
- **Budget, Finance Plan, and Timeline**

## Contest, Context, and Climate

- **What kind of contest is it?**

The campaign is either about change or maintaining the status quo—do voters want to keep the current mayor or elect a new one?—or it is a contest between different versions of the future, the one your campaign offers voters versus that of your opponent.

An incumbent might argue that voters should let her “finish what we started” and highlight accomplishments and projects in progress. A challenger would argue that we “need a new direction” and offer alternative approaches to old problems.

Candidates for open seats often emphasize their ideological and policy differences, asking voters to embrace their vision.

- **What is the electoral context for the race?**

Is it a presidential or gubernatorial election year? Voter turnout, and therefore the campaign’s vote goal, is higher in a presidential election year. Is this a partisan candidacy attached to other popular/unpopular members of the party? Or is it a nonpartisan candidacy that allows for endorsements and alliances on both sides?

- **A word about electoral climate.**

Rarely are individual, local contests determined by the general sentiment of the electorate, but it does happen. The Gingrich revolution of 1994 and the 2003 California recall election are two recent examples. Is there a wave of voter emotion that could toss the campaign boat or create an opportunity?

## Candidate, Voters, and Vote Trends

- **What’s the rationale for this candidacy?**

Voters deserve a clear and concise answer. Campaign planners should research the candidate’s contribution to the community. To understand what motivates the candidate, have her write a faux obituary.

To craft an honest and persuasive answer to “Why are you running?” the candidate must be able to say, clearly and directly: What she is for.

What she has done, and what she will do. Why voters should believe her. Who will stand with her. When the candidate can respond effectively to each of these, the campaign can begin to craft its message.

- **How many votes do you need to win?**

Past election results hold the key to future campaign success. List vendors can help pinpoint how many and who voted in past similar elections (presidential, gubernatorial, or special?). Project the turnout and calculate the 50% + 1 vote in a two person race or the plurality needed in a multi-candidate race. That's the vote goal.

- **Where will these votes come from?**

Where do these likely voters reside? From this data the campaign can generate precinct lists for calling and canvassing voters. What common characteristics suggest target groups of votes? Parents? Women? Seniors? New voters? Occasional voters?

It's important to assess who and what these voters supported in past elections. What else is on the ballot? Will these individuals or issues bring new voters to the polls? Decrease turnout? Split the community? Does your opinion of these candidates or ballot issues matter to voters?

## Competitive Advantages

Voters choose candidates for a variety of reasons, not solely because they agree on issues. Examples of other voter considerations are:

- **Age:** How does the candidate's age compare to the electorate? Could voters conclude she is too old or young to perform in office?
- **Gender:** Is this a "year of the woman"? Or newcomer? Or incumbent?
- **Ideology:** Does this candidate share the voter's basic philosophy?
- **Geography:** Is this candidate from "my side of town"?

Other voter criteria to consider: candidate experience, style, race/ethnicity, public and private accomplishments, alliances.

What are the candidate's advantages or disadvantages? Identifying the criteria through which the candidate most clearly connects with voters provides context, direction and tone for communication.

## Message, Voter Communication, and Field

- **What is the point on which the campaign and voters most agree?**

Consider the climate of the election, the candidate's rationale for her candidacy, voters' past election choices, the most advantageous criteria of choice. Factor in hot community issues and the focus of the job sought. From these, a campaign's message should emerge.

And whether the underlying message is "We can do better" or "Accountability now," the most effective communication of the message is brief and comparative. Cast the candidate in the most positive light while suggesting a shortcoming in the opponent: "Every school board needs a parent."

- **Deliver the message by methods that have a track record of success with your voters—mail, phone calls, and volunteer visits are tried and true.**

Newspaper ads, billboards and lawn signs work in some areas and are viewed as visual pollution in others.

Layer and reinforce. Low-cost communication like e-newsletters, newspaper inserts, and columns for club newspapers are popular supplements to paid communication.

- **The plan should include specific responsibility for recruiting, training, managing, and appreciating volunteers.**

How and when to deploy them becomes the field plan. Assessing whether canvassing, phone calls, personal "dear neighbor" postcards, or lawn sign delivery is the best use of volunteer time should depend, in part, on the message (if it's personal service and accessibility, a volunteer at the door becomes the message) and practicality. Older volunteers will likely come back for more mailing parties and phone calls, but not precinct walking.

## Budget, Finance Plan, and Timeline

- **When the campaign has decided on the message and how to communicate it, the next task is figuring out how much it will cost and where those funds will come from.**

More than anything else, the budget is a statement of strategy. It should include projected expenditures for staff, headquarters rent and overhead, legal advice, and voter communication materials. Ideally, 70 percent of the budget will be spent on communication with 10 percent set aside for unexpected expenses.

- **The finance plan should assign amounts that the campaign can raise through direct mail, events, major donor solicitations, peer solicitation, political action committee contributions, and on-line campaigns.**

The budget number and finance plan objective should match. Weekly goals and check-ins are essential to stay on track.

- **Finally, all the “to dos” that resulted from researching, analyzing, and formulating the best ways to persuade voters should be laid out on a timeline: everything from when to announce high visibility endorsements to when to order the voter walk lists.**

The timeline should include filing deadlines, financial report due dates, and critical events such as debates. When all the important deadlines are visible, the strategy should be clear. Then, there’s just the doing and the winning.

*Mary Hughes, president of Staton & Hughes, is a veteran Democratic political strategist and campaign advisor based in San Francisco.*

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## A Timeline for Your Campaign

- **Early**

In the early weeks of your campaign, you will need to make progress on several fronts.

- Create an effective core organization to run your campaign (see Chapter 3).
- Establish the substance of your communications by developing your campaign theme and positions on priority issues (see Chapter 4).
- Begin to implement your fundraising plan and to identify contributors (see Chapter 5).
- Develop ways to deliver your message; schedule important events and appearances for the remainder of your campaign (see Chapter 6).
- Build support for your candidacy; talk to important local organizations and leaders and try to gain their endorsements.
- Increase your name recognition by placing large signs at high-traffic intersections and distributing other campaign paraphernalia to supporters.
- Locate your target audiences, develop responses to their concerns, and start talking directly to voters (see Chapter 7).

- **Middle**

Once these efforts are underway, your campaign's focus should turn to getting your message out to key constituencies and persuading undecided voters to vote for you.

- Identify likely supporters and undecided voters and determine how many voters are committed to you and to your opponent(s).
- Actively contact undecided voters through phone, door-to-door, and mail communications and persuade them to vote for you.
- Build your fundraising networks and volunteer base to ensure that there are sufficient resources for your final push.
- Participate in public forums and debates. If none are scheduled, encourage local organizations, members of the news media, and your fellow candidate(s) to organize and participate in future forums.

- **End**

During the final weeks of the campaign, your activities should focus on encouraging likely supporters to vote (by promoting absentee voting and organizing get-out-the-vote efforts on Election Day) and persuading undecided voters that you are the right candidate.

- **Target your persuasive efforts to achieve the necessary margin of victory.**
- **Put your advertising and direct voter contact operations into high gear.**
- **Create momentum for your campaign by earning free appearances on local media and holding large events that draw many voters.**
- **Hone your message as voters pay more attention to the campaign.**

## Producing a Campaign Budget

Successful candidates create budgets to ensure the efficient allocation of their campaign resources. Without a plan you might spend too much money on overhead or administration and too little on communicating your message to voters, or you might overspend in the beginning of the campaign and not retain enough resources to make a strong finish. The key to successful budgeting is making a realistic assessment of your fundraising targets and the costs of implementing your campaign plan.

Start by projecting the amount of money you expect to raise over the course of the campaign, including when contributions are likely to come in. You should make an informed guess, an optimistic assessment, a conservative assessment, and a worst-case scenario and establish basic budget allocations using each estimate. The actual fundraising for most campaigns falls somewhere between the informed guess and the conservative estimate. Budget carefully, so that you don't end up incurring large debts by the end of the campaign or lose your final opportunity to speak to voters.

Next, make a list of all the items that are absolutely necessary to your campaign. This might include office space, salaries, materials, travel, mail, and fundraising. Typical fundraising estimates suggest that nearly one-third of the money you raise will be spent on your efforts to raise it. No matter how you might want to spend the money that you raise, these up-front costs must be in your budget.

Finally, divide your remaining funds between delivering your message and building your organization. You should allocate as much money as possible to communicating your message to the voters. Your biggest expenditure will probably be electronic media advertising, though many local campaigns often operate without this. Television and radio advertisements entail costs associated with production, ad placement, and professional expertise, which can be quite expensive.

Depending on the size and location of your constituency, print advertising, direct mail, phone contact, and door-to-door canvassing may be more cost-effective methods of contacting voters than electronic media. (See Chapter 6 for more on the costs associated with delivering your message.)

You can use volunteers to get your message out, but remember they are not without cost. Typically, volunteers must be called regularly by a staff member, given materials to distribute, and provided with refreshments to thank them for their time and effort and encourage them to offer their help again.

However you decide to allocate your funds, careful budgeting is critical to your campaign's success. When developing your budget, be aware of all your potential expenditures, be realistic when assessing their likely costs, and keep track of your spending very carefully. If your estimates turn out to be off, revise your budget allocations to account for the difference.

#### ■ LEARN MORE ON THE WEB:

At [campaigns.berkeley.edu](http://campaigns.berkeley.edu) you will find more information on campaign plans and budgets, including examples.

## Allocating Your Time

When you are a candidate, your time is your most valuable resource. You are typically the best fundraiser, the best persuader, and the best organizer. The campaign revolves around you, and people look to you for leadership. At the start of the campaign, you may have time to be involved in all aspects of the campaign, but as the election draws near your time will grow increasingly scarce and ever more precious. Managing your time effectively will enable you to focus on and complete the most important tasks of your campaign.

To ensure your time is allocated effectively, keep a precise schedule of your campaign duties and engagements. This will help you keep track of your many obligations. It will also reduce the chance that you will forget to attend an event that you promised to attend, which can result in losing the support of those who invited you and make a bad impression on those who came to see you. Always be on time to meetings with voters, campaign events, and other scheduled engagements. By doing so, you will develop a reputation as someone who cares about the concerns of the voters.

As you make decisions about your schedule, you will not be able to accept every invitation. You will be asked to attend multiple events at the same time, especially the closer you are to the election. More important engagements may arise from time to time, forcing you to cancel previously scheduled appearances. If you do have to cancel, make sure you contact those who invited you as early as possible, provide a clear explanation of the reason for your cancellation, and propose alternate times to make up for your absence. Hiring a staff person or designating a volunteer to serve as your scheduler makes this process much easier.

#### ■ TAKE NOTE:

Time is your most precious campaign asset. Track your time carefully. And use it wisely.

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alternate times to make up for your absence. Hiring a staff person or designating a volunteer to serve as your scheduler makes this process much easier.

Some things to keep in mind when planning your schedule:

- **Allocate sufficient time for making fundraising calls and attending fundraisers.**
- **Look through a list of community events, fairs, and parades to make sure you don't miss a major opportunity to meet potential voters.**
- **Make yourself available for any public forums, especially if other candidates will be there. The public is wary of candidates who seem to avoid debates and other opportunities for public dialogue.**
- **Make yourself widely available to the media at their convenience. Any opportunity to appear on radio or television, even for a short time, can save your campaign money (for example, the cost of buying TV time) and introduce you to many voters at once.**
- **Include in your schedule time to rest and enjoy family life. Take time to replenish your body and spirit. It will make you a more effective campaigner.**

## Planning the Kick-Off Event

A campaign is composed of a series of events designed to communicate your message to voters and interest them in your candidacy. Campaign events can be an effective way to get media attention, rally your supporters, and create “news” by making important public statements. Your first opportunity to achieve these goals is your campaign kick-off event. The local media often consider the announcement of a political candidacy to be an event worthy of coverage, and supporters will get excited when you make your intentions clear and launch your campaign.

The kick-off event may also provide the media and your supporters with their first impression of you as a candidate. Take advantage of the free publicity and make sure the initial impression is favorable. Hold the event near the beginning of the week at a location that is public, provides “good pictures” (dramatic backdrops or large crowds help to ensure coverage), and is easy to find. Inform your supporters and the press about your event several days in advance.

The goal of the kick-off event is to create a “buzz” about your candidacy so it becomes a topic of discussion among your supporters and local stakeholders. You might invite a popular public official or someone who is well known and respected in the community to introduce you, which can add credibility to your candidacy. In your announcement speech, make sure that you provide a clear rationale for your candidacy. (See Chapter 4 for more on developing your campaign rationale.) You should also provide evidence of your knowledge of community issues and concerns and describe how you plan to address them. Set aside time to meet with press after the event, in order to answer specific questions about your candidacy.

Your kick-off event does not have to be limited to a single press conference. Instead, you might create a day of events to keep the momentum flowing in your favor. For example, you might hold events in several neighborhoods or in conjunction with some early precinct walking. Ideally, your kick off event will be the first of a series of campaign events held throughout the campaign.

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## ■ ADVICE FROM THE FRONT LINES: “How to Lose and Win an Election,” by Polly Armstrong

I was a shoe-in when I ran for my second term on the city council in 1996. I had lived in my district for 20 years. I’d spent the eight years preceding my first term as the council aide for the district. I’d run May Fairs and Campfire groups, League of Women Voters meetings, and PTA meetings. I had received newspaper endorsements and good publicity on my accomplishments in my first two-year term. I was an incumbent and the gentleman running against me was unknown. All conventional wisdom said I would not need to run an active campaign, and I didn’t.

On election night I lost the race by about 25 votes to the now quite well known opponent. Fortunately for me, postelection day counting of absentee ballots pushed me ahead by 90 votes and my political life resumed, but I was humbled and confused by my narrow victory and set out to analyze what had gone wrong.

The answer was depressingly simple, really. Although my opponent had little money and no quality literature, he had been tenacious. He and a dedicated supporter had knocked on doors in my traditionally strong precincts, dropped amateur literature on doorsteps across the district, and talked to voters every day and most evenings throughout the campaign. They managed to contact most residents at least twice and sometimes more often. Even people who knew me and approved of my work were impressed by their dedication and earnestness.

In addition to having a stronger ground game, my opponent also appealed to specific segments of my district. About half of my district’s voters are tenants or students who live on the University of California campus. My opponent’s pro rent control position held an automatic appeal to tenants, and the fact that my opponent was a Green Party member surely trumped my Democratic registration among some voters. I wasn’t willing to change my stance on rent control or my party identification for the next campaign, but I certainly could and had to do a better job of contacting voters the next time I ran.

After I decided to run for a third term, I developed a new game plan that incorporated the lessons of my narrow victory. My physical condition did not permit me to trudge up and down the many steep hills and

stairs in my district, so I began my voter outreach by having neighborhood meetings at voters' homes a year and half before the election. One week before the meetings, volunteers dropped flyers at every house within a 10-block radius announcing the meeting. Afterward we dropped flyers again, reporting on what we talked about at the meeting. Attendance was very light—perhaps an average of eight people per meeting—but by the time we were done, I had contacted hundreds of voters twice.

Over the course of my term, I developed other ways to keep my name before the voters. I designed brightly colored single sheet statements on my positions on local issues and passed them out at every opportunity. I produced and delivered newsletters four times a year to keep voters informed about what was happening at City Hall. I paid for these newsletters with campaign funds, not city money, and they were very popular.

Most of the fraternities and sororities on campus are in my district, and I made a lot of house visits for dinners and talks and tried to find other ways to connect with them. Eventually I hired a Greek coordinator to get out the vote and developed literature specific to campus issues. (Depressingly, after the election I learned that none of my campus efforts had increased student turnout among the Greek community or students in general.)

Eighteen months before the election, I formed a committee with four strong supporters and a campaign chair. We met monthly for the first six months and then weekly to discuss strategy and plan campaign events. Over the course of the campaign I raised approximately \$30,000 (in a district with 11,000 residents) through mailed fundraising letters and two campaign parties—one expensive and fancy, one local and simple—so that anyone who wanted to support me financially would have a comfortable way to do it. This gave me the resources I needed to get my message out.

In late summer we put out a glossy four-sided flyer that introduced me and my family and my experience to the voters, even though it irritated me to think that all my years in the community hadn't taken care of that! We followed that piece with five or six mailers spread out through the last two months of the campaign, stressing my accomplishments and experience and my opponent's lack thereof. Although the pieces were critical of my opponent, the contrasts that we drew were fair and necessary for underscoring the relevant differences between us.

In the final weeks of the campaign we intensified our efforts to contact voters. I knocked on doors in the neighborhoods where I had not done as well as I should have in '96. If voters weren't home I left a signed card saying, "Sorry I missed you." We also blanketed the district with yard signs. Professionals say they don't matter but they do add energy to a campaign. Our signs were stolen at a prodigious rate but replacing them kept us in personal contact with our supporters.

We knew the person helping my opponent's campaign had a reputation for sending out "hit pieces," so we saved enough money and prepared ourselves to combat a last-minute lie or attack. Not surprisingly, my opponent released an attack piece three days before the election. It included a photo of me with a laser gun from the opening celebration of a laser tag gallery and text indicating I was a dangerous choice for office! We agreed that the piece would be seen as silly rather than convincing, so we spent the money we had saved to respond to his anticipated attack on card-sized reproductions of newspaper endorsement highlights, instead. We covered the student areas with them in the last 24 hours.

On election night I won by a 16% margin (58% to 42%). All my contact work in the neighborhoods that traditionally supported me was successful. Voter turnout increased and the percentage of support that I received was dramatically higher in those areas. There was very little positive change among the tenant and student districts, but my base voters came through for me.

The lessons I learned from this campaign were: campaign even when you don't think you need to, the more voter contact the better, concentrate on the voters who agree with you, and although you need to be prepared to correct an attack, don't start the fight as there are better ways to use your campaign's resources!

*Polly Armstrong recently returned to a more peaceful private life after 16 years in Berkeley politics.*

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## Developing Strategy with Campaign Managers and Consultants

Friends and professional advisors can provide valuable help and expertise when building your campaign plan and designing your strategy.

Ultimately, however, it is your name on the ballot and campaign materials. All campaign activities will reflect on you and your candidacy.

As you solicit advice, keep several things in mind: First, you know more than anyone about your personal strengths and weaknesses and how they might affect your run for office. Second, you may know more about the specific concerns of the people in your district or in the jurisdiction where you are running than your advisors, especially if they come from another area. What works in some places may not work in your community. Importing successful strategies from elsewhere can be an effective part of your campaign, but be sure to adapt them to the particular circumstances of your area and your campaign. Third, you may be more concerned about your long-term reputation than an advisor. You should be the final judge of whether or not a possible short-term tactical advantage is worth the risk of long-term damage to your reputation.

Having a candid conversation with your managers and consultants at the beginning of the campaign about what you will and will not do to get elected will help to minimize the likelihood for mid- or late-campaign disagreements. If you think that your consultant is recommending something unethical, check the Code of Ethics promulgated by the American Association of Political Consultants available at our Web site ([campaigns.berkeley.edu](http://campaigns.berkeley.edu)). The principles articulated in the code may also be a starting point for discussions about campaign philosophy.

#### ■ BEST PRACTICE:

Sit down early on with your supporters and strategists to establish ethical lines that you will not cross.

## Conclusion: Five Things to Know When Planning Your Campaign

### 1. Context matters.

Every campaign is different and must respond to the specific context in which it is run. Be sensitive to the concerns, values, and political culture of your constituency and know how to adapt the key strategic elements of a campaign to your race.

## **2. Take care of important details.**

Getting on the ballot and filling out campaign finance forms may not seem like the most central aspects of your campaign, but failure to comply with the legal requirements associated with running for office can sink your candidacy.

## **3. Plan as much as possible in advance of the campaign.**

As the campaign progresses, you may not have time to engage in lengthy brainstorming sessions to determine the scope and direction of your campaign. Before the campaign begins, develop your basic strategy and how you will implement your objectives. Make sure your plan is coherent, allows for mid-course corrections as conditions change, and achieves your key goals.

## **4. Manage your time and money carefully.**

Your time and the funds you raise for your campaign are key assets of your candidacy. They must be managed like the major resources they are. Develop and follow a realistic campaign budget and carefully schedule your time throughout the campaign.

## **5. Set goals and monitor progress.**

Based on your campaign plan, make clear what you, your staff, and your volunteers are expected to accomplish in terms of voter outreach, fundraising targets, or office responsibilities. Monitor your progress, celebrate your successes, and adjust your plans to the shifting context of your campaign.