

Building Your Campaign Organization

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Successful campaigns, like most major projects, require well-run organizations that make the most of participants' talents and skills and combine them in a way that promotes collective success. As a candidate, your achievements will be the product of a team effort.

In order for you to focus on communicating your message to voters, you will need to build an organization that will manage the bulk of the operational and administrative tasks of the campaign for you. While a team of volunteers can provide much needed support to your campaign, running a successful political campaign requires expertise. If possible, build an organization that combines professionals and volunteers—trusted specialists who direct your campaign and a motivated group of beginners who build a broad movement of local support for your candidacy.

Selecting Staff for Key Campaign Positions

Start building your organization by filling your key positions and then add help where it is most needed. Here are the most important roles to fill in your campaign, in order of importance:

- **Campaign Manager**

The campaign manager is responsible for all aspects of the campaign. Initially, the campaign manager will be intimately involved in developing campaign strategy and planning your campaign. After the planning phase, the campaign manager's role will shift from strategy development to strategy implementation, making adjustments as necessary to achieve the ultimate goal of winning the election.

Qualifications include an understanding of political strategy, a mutual trust and rapport with the candidate, good organizational abilities (including management and delegation skills), objectivity about the candidate and the campaign (which may make loved ones inappropriate campaign managers), and the ability to deliver unwelcome information. The campaign manager needs to share the candidate's vision of what are—and are not—acceptable campaign practices.

- **Treasurer**

In most races, your treasurer is legally responsible for keeping track of your contributions and expenditures. Your treasurer should be a person you trust and should have experience in handling money. If you have a friend who is an accountant, he or she should be the first person you ask. Since campaign financing procedures are somewhat different from those used in the business world, someone with previous campaign finance experience will provide a significant advantage. Whoever you choose, make sure that he or she is willing to commit for the length of the campaign so that you won't need to transfer responsibility for bookkeeping while the campaign is underway.

■ **TAKE NOTE:**

The campaign manager and the candidate need to share a vision of what are – and are not – acceptable campaign practices.

The first thing your campaign treasurer should do is read all the regulations that apply to the office for which you are a candidate. These are usually available from the county elections official; links to relevant Web sites can be found at campaigns.berkeley.edu. Make sure that you and your treasurer are aware of the full scope and timing of your filing responsibilities and check-in with your treasurer regularly to ensure that your campaign finance reports have been filed on time.

- **Fundraising Director**

In small campaigns, the treasurer may also assume the role of fundraising director. Appointing a separate fundraising director, however, can increase your total level of contributions. The fundraising director is responsible for implementing the fundraising plan. This involves coordinating all of the tools at the campaign's disposal to meet fundraising goals within the necessary time frame. The fundraising director guides the campaign's major donor and direct mail fundraising programs and oversees fundraising events. In campaigns that cannot afford an accountant or attorney, the fundraising director must have a basic knowledge of campaign finance regulations.

- **Volunteer Coordinator**

This person is responsible for recruiting, scheduling, and organizing the volunteer team. Qualifications include good organizational and

scheduling skills, coaching skills (for volunteers with limited or no prior campaign experience), diplomacy, patience, and a commitment to ongoing communications with the campaign's volunteers.

The volunteer coordinator must be a motivator and a source of accountability with the troops. In larger campaigns, candidates may want to split responsibility for managing volunteers between a volunteer coordinator and a field coordinator, with the field coordinator assuming primary responsibility for implementing the voter contact program.

- **Scheduler**

The scheduler helps manage the candidate's time. He or she responds to outside requests for candidate appearances and searches for speaking opportunities where the candidate might make an impact on prospective voters. The scheduler is the campaign's primary contact with the local media but should not be the person who makes statements on behalf of the candidate.

The scheduler should be organized and personable, preferably with experience as an administrative assistant or in public relations. In small campaigns, this person might also serve as the office manager.

Hiring Other Paid Staff

Most small campaigns will not have enough funds to hire people for all of the positions listed above. Larger campaigns should consider hiring several additional employees whom the candidate can depend upon. This is because volunteers typically work fewer hours and serve at their own convenience, and many tasks, especially on a large campaign, require a full-time commitment.

An office manager can help ease the administrative tasks of the other staff. This person might help organize materials, send out mailings, and answer phone calls. Depending on your campaign strategy, you may want to have an outreach person to oversee your efforts to contact voters using phone banks or door-to-door canvassing. In small campaigns, the volunteer coordinator will take on these roles. You may want a Web master to build and maintain your Web site, especially if you plan to regularly update your site with new statements and respond to email requests and questions. You might assign someone to post signs throughout

the district or jurisdiction for at least part of the campaign. This person would deliver yard signs to supporters who request them, and search for prime locations to post larger signs, which will help increase your name identification.

One way to expand your staff without exceeding your payroll allowance is to assign official positions to volunteers. Strong supporters or local party organizers, especially young people, may be willing to take on extra responsibilities if they are given an official internship or title in the campaign. Volunteers of this kind should be treated as staff members and thanked repeatedly.

Setting Up the Office

Your organization needs a center of operations. If possible, rent inexpensive office space that is accessible to your volunteers and visible to the community. Start a separate bank account for the campaign, obtain a campaign credit card, and keep track of office expenditures (for example, rent, furniture, phone service, Internet service account), even if they are donated by an organization as an in-kind contribution.

For a small campaign, the headquarters might be a room in your house. Even if you have limited resources, try to create a space with at least a phone line, a computer, and a printer. The campaign room should have the appearance of a professional operation. It should be a place where volunteers receive clear task assignments and there is an abundance of campaign supplies on hand. At a minimum, make sure that you keep your materials organized.

Maintain databases of contributors, volunteers, and media contacts. Have contribution envelopes, signs, and legal forms on hand. Obtain a precinct map of your district or jurisdiction to locate your target voters and follow your progress in door-to-door campaigning. Compile a stack of favorable media clippings about the campaign that volunteers can xerox and distribute to interested voters.

Create a file of information about yourself and your fellow candidate(s). These files can serve as reference points, helping to ensure the accuracy of the claims you make during the campaign. Post a large calendar on the wall to keep track of events and responsibilities. Most importantly, balance your books daily and make sure that your database

allows you to record every debit from and credit to your campaign accounts.

■ BEST PRACTICE:

Never ask a volunteer to do something that is illegal, unethical, or you would never do yourself.

Recruiting Volunteers

Building a large volunteer base for your campaign is an effective strategy that costs little, enhances your public image, reduces the strain on you and your paid staff, and gives supporters an important opportunity to participate directly in getting you elected.

Getting started with your recruiting can be difficult because the most important resource for gaining new volunteers is existing volunteers. The good news is that once you get your operations going and treat your volunteers well, your support base is likely to grow. At the beginning of your campaign, however, you may need to rely on your friendship networks and existing organizations for volunteers.

As you work within the local structure of your political party or participate in events for social or charitable organizations prior to running for office, develop a list of potential helpers that you can call on when

you begin campaigning. If you have already built a coalition of supporters, ask your coalition partners to recruit volunteers for your campaign. Student organizations at local schools provide another venue for recruiting volunteers, as do local political and social clubs.

■ BEST PRACTICE: Build a large volunteer base for your campaign.

Building a broad campaign organization not only helps you win elections by contacting more voters and mobilizing your base of support, it strengthens democracy. By expanding participation, you give your supporters an opportunity to take control of the future of their community by participating directly in local decision making.

Teaming up with other campaigns can offer an effective way to multiply your volunteer resources. Consider contacting candidates who are running for other offices in your district or jurisdiction. See if they would be willing to combine their leaflet-dropping efforts and other forms of contact with voters with those of your

campaign. Always circulate a volunteer sign up sheet at campaign events and meetings with voters.

One way to encourage participation is to make the first event of the campaign season entertaining. If your initial fundraiser involves free food and music, for example, it is usually easy to get people to help with the planning. If you make precinct walking a social activity that is friendly to families, you are likely to get people to commit to a regular schedule.

Whenever you recruit new volunteers make sure that you get all of their contact information, including phone numbers and email addresses. Put their names and contact information in a volunteer database along with the types of activities they are interested in doing and their hours of availability. If people cannot attend the event that you are recruiting them for, take down their information and extend regular invitations until they find an event that they can attend. It is best to have at least a few activities that can be done on a weekly basis so that you can get several volunteers to develop a habit of coming in every week and recruiting others to come along.

As people volunteer their time for your campaign, make sure their contributions are recognized. Introduce volunteers to your campaign staff and your supporters and make sure that they get some face time with you, the candidate they are trying to help. As the election draws nearer, emphasize to volunteers who have been with you since the beginning that the current volunteer projects are more critical than those that came earlier, making their help even more valuable. Invite your volunteers to campaign functions that do not involve work, so that they can share in your success as the campaign progresses.

■ BRIGHT IDEA: Repudiate Unethical Activities

Make sure that everyone in your campaign adheres to your high ethical standards. Many campaign codes of conduct address this issue by committing the candidate to disavow unethical activities. For example, California's Code of Campaign Conduct, which many candidates sign, states:

I shall immediately and publicly repudiate support deriving from any individual or group which resorts, on behalf of my candidacy or in opposition to that of my opponent, to the methods and tactics which I condemn. I shall accept responsibility to take firm action against any subordinate who violates any provision of this code or the laws governing elections.

Of course, it is better to avoid having to disavow unethical activities by making it clear to your supporters and volunteers up front what kind of campaign you plan to conduct and what kinds of activities are not acceptable. Stress that, while you appreciate their commitment to your shared cause, if anyone steps over the line, you will have to repudiate their actions immediately and publicly.

■ ADVICE FROM THE FRONT LINES: “Why I Volunteered,” by Katie Burke

I volunteered to work for Tom when he decided to run as a challenger in the mayor’s race because he asked me to, and his request carried considerable weight. I first met Tom while working on another campaign, where he had been a strong motivating force among the volunteers. I respected him, and when he asked me to work for him I felt a personal stake in the election. Tom told me that students’ voices, my voice, mattered in this election. He told me that I could help him reach students. I felt empowered, and I believed in him, so I volunteered.

As a student organizer, I began volunteering by door-knocking, phone banking to student communities, and going with Tom to meet student organizations and ask for their support. As my dedication to Tom’s campaign grew, so did my responsibility—my part-time involvement quickly became a full-time commitment. I was soon organizing call nights with volunteers from supportive student organizations, and I developed a comprehensive database of student volunteers and supporters. I recruited volunteers on campus, managed student phone bankers, and worked with the campaign staff to develop a call script that would most effectively convey Tom’s message to students.

I found it easy to advocate for a candidate I knew, to a constituency I knew, in a community I knew. Voter contact was straightforward and felt personal. The conversations I had with students after knocking on their doors felt very similar to political discussions that we might have had in a political science class. I could tell likely voters exactly why I was going to vote for Tom and why I thought that they should too.

Tom promised if elected mayor he would work to increase the amount of affordable housing available to students who are faced with a tight rental market, and he would work to protect low fares for public transportation. When speaking with my peers, it was easy to show that these were not abstract political issues, but rather “our issues”—practical matters with which most students had direct experience. As a member of their community, I was able to relate to student voters through our shared concerns. Familiarity and first-hand knowledge of the candidate further boosted my confidence while engaged in voter persuasion.

There were times, however, when I became a little nervous while speaking with voters about Tom's stances on particular issues. The pressure to provide specific and accurate information on a multitude of issues (including issues that I, a college student, had no direct experience with) to a questioning voter can be a little overwhelming. While it is probably not possible to know exactly where a candidate stands on every single issue, I was able to speak from my own experience and tell them who Tom was as a person and as a candidate. In addition to listening to me describe his campaign platform, many voters were receptive to becoming acquainted with Tom in this way.

I believe my membership in the community that I was seeking to organize, and the credibility that came from this, as well as my personal connection to the candidate made me a more effective voice for Tom's campaign. I also developed a unique sense of accountability to my peers, which increased my commitment to the campaign. It was as if the campaign promises had become my promises. I knew that the role of a volunteer is to aide the campaign in spreading its message and executing its strategy, not to question it. While engaged in voter persuasion among my own student population, however, it was important for me to know that student issues really were a significant part of the campaign and would be addressed by Tom's administration if he won.

Fortunately, from spending time in the campaign office and listening to Tom and the rest of the staff discuss the campaign, I knew this was the case. Knowing that the goals of the candidate were also top priorities for my community motivated me to work even harder as a volunteer, for both the candidate and my community.

Katie Burke is a graduate of the University of California at Berkeley and currently works as a congressional aide on Capitol Hill.

Using Volunteers Effectively

Volunteers provide valuable, free labor to your campaign. Make every effort to use this resource wisely by planning effective and creative ways to incorporate volunteers into the major tasks of the campaign. Make these tasks fun (for example, play music, provide refreshments), so volunteers are likely to return.

Volunteers are always needed for mailing fundraising letters, making phone calls, walking precincts, delivering signs, and writing thank you notes. At the very least, your volunteer coordinator should organize these types of activities for your volunteers and be prepared to have enough work on hand for as much help as you might receive. Keep in mind that for some projects, especially ones that are critical to the success of the campaign, you may need to hire a professional.

Volunteers can be used in innovative ways. They can seek out local organizations to talk to about your candidacy, pass out campaign materials at busy locations, produce additional materials for your Web site, prepare briefings on local policy issues, return phone calls and emails from voters, set up a booth or table at a local event to publicize your candidacy, and prepare specialized versions of your campaign material for specific events or constituencies. Always explain the necessity and importance of the activity that you are asking volunteers to complete, and match the skills of the volunteer to the task at hand.

Volunteers will—wholly apart from these tasks—influence a circle of friends and family to vote for you, just by their commitment to your candidacy. They should be fully informed so that they feel a part of the campaign organization and can promote your candidacy in their discussions.

Volunteers are an important source of feedback about how well a candidate's messages and strategies are working in the field. After a day of precinct walking or phone banking, ask your volunteers to report on how voters responded to their efforts. Request their suggestions for how to improve future efforts and give them credit for their good ideas.

■ **ADVICE FROM PROFESSIONALS: "Building an Effective Volunteer Program," by Jarryd Gonzales**

All campaigns have volunteers. Winning campaigns understand the impact an effective volunteer program can have on the outcome of a race. Volunteers play a significant role on local campaigns, more so than statewide or national campaigns, because local campaigns often operate on very limited budgets. There are many components to every campaign plan, most of which are paid efforts such as: radio or television ads, di-

rect mail and telemarketing. Perhaps not as sexy, but equally important to all campaigns, is the volunteer program.

There are four steps to building an effective volunteer program:

1. Recruiting
2. Managing
3. Tasking
4. Thanking

1. Recruiting

Volunteers are the heart and soul of any campaign team. Unlike paid staff, volunteers receive no monetary compensation and dedicate their free time to a cause they believe is right—getting you elected!

There is a misperception that lack of time and cynicism have resulted in a decline of volunteerism on political campaigns. The number one reason people do not volunteer is because we don't ask!

Recruiting volunteers willing to dedicate their spare time to your cause is not as daunting as it seems. In order to effectively recruit volunteers, it is important to understand why people volunteer.

Reasons People Volunteer:

- Commitment to particular political party/ideology
- Commitment to a specific candidate
- Commitment to a specific issue
- People dislike your opponent
- Community service requirement

Now that you have an idea of why people volunteer, the following are good resources for volunteer recruitment:

Family and Friends

Always begin with your personal rolodex or phone list. No one knows the candidate better than his or her family and friends, and they should be the first source of local campaign volunteers. These individuals are typically easy to recruit, loyal to the candidate, and willing to work hard.

College /High School Students

One of the best and often overlooked sources for campaign volunteers is your local college or high school. Political Science majors are usually eager to get real political experience—students with other majors, such as journalism, history, and information technology, are also quality potential volunteers. Political science departments, student governments, and political clubs can serve as easy points of contact. Some high schools require that students complete a specific number of community service hours to graduate. Contacting the American government or civics teacher at the nearby high school may be worthwhile.

Association Members

Is the candidate an active member of any civic, community, church, or other group? Members of those groups may be willing to spend their free time working on the campaign. Members of such organizations are often knowledgeable about local issues and have large networks of civic-minded acquaintances.

Local Political Parties

Whether you are a Republican, Democrat, or Green Party member, your local political party may be able to provide you with names of people who have volunteered in the past, or who have asked to volunteer for this election. Check with party leaders to see if such lists are available.

Unsolicited Offers

Few people will call a campaign or stop a candidate on the street and ask to donate money. But many campaigns are surprised by how many people offer to volunteer their time and talents to the campaign without being asked. Be prepared for unsolicited offers to volunteer: always carry small, preprinted cards for potential volunteers to fill out, and make sure to follow up and involve them in the campaign. Another avenue is the Internet. Be sure to have a volunteer sign-up page on your Web site. You'd be surprised how many people will sign up to volunteer online.

Volunteer Networks

Make use of the friends and families of your existing volunteer corps. Ask your volunteers to recruit their friends and family to help with

the race, and provide a creative opportunity for them to do so: Have a Volunteer Appreciation Party for your existing volunteers and ask them to bring friends and family. Be sure to send around a sign-up sheet with specific volunteer tasks on specific dates.

Campaign Events

After asking for votes and/or donations at campaign events, the campaign should ask anyone interested in volunteering to fill out an information card. This recruitment can be done at all kinds of events: the kick-off rally, fundraisers, coffees, town hall debates. If such a solicitation threatens to detract from the main purpose of the event, the recruitment can take place on the way out, by placing tables or staff at the back of the event.

Make your headquarters volunteer-friendly. Have snacks and beverages available at all times, take a photo of every volunteer and post them on a wall entitled “Volunteer Corner,” and have a television set or radio for their entertainment while they are working.

2. Managing

Volunteers must be managed. Despite their hard work and dedication, they are not experts and must be overseen. Every campaign that uses volunteers should hire or designate a Volunteer Coordinator whose job is to recruit, manage, schedule and train volunteers. The ideal Volunteer Coordinator works well with people, is a proven motivator, and possesses great patience.

In addition to appointing a Volunteer Coordinator, the campaign should produce a volunteer policy manual that details appropriate attire, acceptable/nonacceptable behavior, working hours, re-imbusement for mileage and other minor expenses (if applicable), and office procedures such as how to answer the telephone or work the fax machine.

3. Tasking

There is nothing worse for a volunteer than arriving at a headquarters where there is nothing to do. This is the fastest way to lose your volunteer base. Be sure to keep a list of tasks for volunteers at all times. Equally important is determining the types of tasks your volunteers ought to be working on.

The following is a list of common volunteer tasks:

- Stuffing mail
- Answering phones
- Phone banking
- Precinct walks/canvassing
- Yard sign delivery
- Data input
- Making copies

Once you have developed a list of volunteer activities, be sure to match them with the skills of your volunteers. An organized campaign will have all volunteers fill-out an information card that asks them to list their areas of interest—for example, computer work, making phone calls, walking precincts, etc.

4. Thanking

The most effective way to retain your volunteers is to thank them. A campaign can recruit hundreds of volunteers, but if they are not thanked, many of your volunteers will not return.

There are many ways to thank volunteers. The candidate can make personal thank you calls to volunteers, or the campaign can host a Volunteer Appreciation Barbeque after a weekend campaign activity. A more expensive avenue might be to take out a one-page ad in your local newspaper and thank your volunteers by listing their names.

Volunteers are the grassroots backbone to every campaign. In addition to augmenting the paid components of a strategic plan, the amount of volunteer activity on a local race says a lot about a campaign and its candidate. Volunteer activity usually means that people are passionate about a candidate and his issues. Often that passion and drive lead to a motivated workforce that will yield positive results on Election Day.

Jarryd Gonzales was political director of the California Republican Party and executive director of Victory 2004.

Building Coalitions with Local Organizations

The easiest way to increase the size of your organization is to enlist the help of other organizations. Rather than recruiting one volunteer at a time, you can encourage entire social clubs, unions, or church groups to help with your campaign. These groups typically have leaders that you can speak to in order to gain their support; the leadership can sometimes do further recruiting on your behalf. Here are a few suggestions for building coalitions with allied organizations:

- **Connect with potential coalition members early in the campaign.**

Find out who is involved with and leads groups that might be supportive of your efforts. See if you can meet with the group's leaders and eventually with the entire leadership hierarchy. Be frank about your stand on issues pertaining to the individual organization—this meeting is about building trust and there is nothing to be gained by less than full disclosure. At the same time, identify common ground and areas of agreement. Ask for the public support of the group or an endorsement, if possible. Although some groups may not (or may be legally unable to) support political candidates outright, their leaders may be able to endorse you.

- **Consider creating an advisory board or executive committee.**

Offer groups a way to participate in campaign planning and discussions by creating an advisory board of group leaders. Use the committee to communicate with the groups that support you, encourage communication between groups, and help group leaders develop an appreciation of the need to form a consensus among disparate elements in the community. Members should be respected and influential representatives of supportive groups and participate in meetings consistently.

■ BRIGHT IDEA: Thank Your Volunteers

Always remember to thank your volunteers during the campaign and after it is over. Before Election Day, think about how you will thank members of your campaign (starting with your victory speech). Providing a personal thank you (email, notes, and phone calls) to those who gave their time and effort to your campaign is not only the right thing to do — it is an investment that will pay off in future campaigns.

- **Recognize participants' contributions.**

Appreciation goes a long way to motivate busy individuals to help. People like to feel important and know that their efforts make a difference. Different individuals and organizations offer different resources and strengths. All contributions are important. Be sure to acknowledge both the organizations and the individual leaders who assist you.

Conclusion: Five Things to Know When Building Your Organization

1. The candidate cannot do it all.

Running for office is an arduous task. The process will be more manageable—and more successful—if there is a division of labor. In

■ **BEST PRACTICE: Follow coordination restrictions.**

Remember that if organizations are planning to engage in advertising on your behalf, these efforts must be independent of your campaign, or they will be considered an in-kind contribution to your campaign. If organizations want to help in other ways, such as donating resources and directing volunteers to your campaign, encourage them to participate through your official campaign channels, while following all campaign finance restrictions.

particular, it is helpful to have a campaign manager—someone whose job it is to make sure that the campaign plan is being implemented while keeping an eye on the ultimate objective, which is to win the election. Other useful people to have on your team include a treasurer, a fundraising director, a volunteer coordinator, and a scheduler.

2. Campaigns are about people.

Campaigns are about the candidate and the voters, of course, but volunteers are an important aspect of the campaign. Volunteers perform some of the most critical tasks in a campaign, including voter contact, fundraising, and getting out the vote. Make recruiting volunteers and involving them in your efforts a key goal.

3. Know whom to include.

Friends, family, coworkers and their friends are sources of volunteers, as are organizations that share your vision for the community. Know in advance (as part of your campaign planning process) the types

of activities for which you need volunteers. This helps you match volunteers' skills and time availability with tasks, and it ensures that you make prudent and effective use of a most precious resource—people's time.

4. Know whom not to include.

Not everyone who volunteers will be beneficial to the campaign. Avoid people who will discredit the campaign or be a burden. People who are known to be indiscreet are another kind of volunteer to avoid; your volunteers will be privy to sensitive strategic information about the campaign. You need to trust your team to keep this information confidential.

5. Take responsibility without micromanaging.

You are the leader of your campaign. When mistakes are made or the organization is not working effectively, you are responsible for finding ways to make it work better. But trying to manage every detail of the campaign is not a wise use of your time. Give your staff the freedom and flexibility they need to do their jobs.

