

## Figure 5: Campaign Job Descriptions and Staffing Tips

### The Core Campaign Staff

The basic rule of campaign management is to delineate each volunteer or paid staff person's responsibilities from the start. You must also set up a clear organizational structure. While you need to encourage and recognize individual initiative, you must be able to manage the campaign rationally. Allowing headstrong, creative individuals to redefine their campaign responsibilities will ultimately restructure your management scheme and cause consternation within the staff.

*The candidate.* The candidate is the most valuable and limited resource the campaign has. His or her time should be spent meeting voters, raising funds, talking to important opinion makers, and boosting volunteer morale. The scheduler decides how candidate time should be allocated in consultation with the campaign manager and the candidate. The candidate simply does not have enough time to manage the campaign. The day-to-day operation of the campaign and most administrative decisions must be made by the campaign manager.

*The campaign manager.* The campaign manager is responsible for developing campaign strategy, executing campaign programs, and directing all staff people. He or she sits on all campaign committees and has final responsibility, along with the candidate, for making campaign decisions. The campaign manager must also make sure that the campaign staff, volunteers, and committees are communicating effectively.

*The candidate's family.* The candidate's spouse may want to be active in the campaign, scheduling many appearances and joining the candidate for major engagements. Or he or she may choose a more passive, supportive role, wishing to be included in some activities but avoiding the spotlight. Obviously, the wishes of the candidate and his or her spouse must prevail in making scheduling decisions.

If the candidate's children are old enough to be effective speakers or make separate appearances, then they may be scheduled to do so. Family participation may, on the other hand, be confined to a few family appearances.

### Other Campaign Staff or Volunteer Positions

Few campaigns will need to have one person assigned to each of the following positions. This list is meant to give you a sense of the types of jobs to be done in a campaign.

*Scheduler.* A scheduler handles invitations, schedules the candidate's time, and makes sure the details involved in each appearance are worked out. A scheduler must know the political turf, understand the campaign plan, and be very diplomatic.

*Press person.* The press person is responsible for effective coordination and communication with the media. He or she helps design the media plan and then executes it. Depending on the size of the campaign, a press person can also be involved in issue research and the design of campaign literature.

*Office manager.* The office manager is in charge of the operation of the campaign headquarters. This job can entail everything from maintaining office supplies to organizing volunteer work at the headquarters to handling petty cash. The specific assignments of the office manager depend on the size of the campaign.

*Driver/candidate's aide.* The candidate's aide travels with the candidate wherever he or she goes. The aide must make the candidate adhere to his or her schedule. The aide should also note questions asked by people the candidate meets, and pass them on to the campaign headquarters for a response. The aide should help the candidate move from person to person at appearances and make sure the candidate meets all the people the scheduler has noted on the daily schedule.

*Finance chairperson.* The finance chairperson directs the fund raising activities of the finance committee. He or she is primarily responsible for making sure all finance committee fund raising programs meet their goals. This is usually a volunteer position.

*Fund raiser.* The fund raiser acts as a staff member of the finance committee in most cases, and helps implement fund raising programs.

*Treasurer.* The campaign treasurer is the campaign's chief accountant. It is the treasurer's responsibility to make sure that all receipts and expenditures are recorded according to the pertinent election statutes. In a major campaign, the treasurer usually needs assistance to perform his or her duties.

*Field director.* The field director is in charge of all voter contact programs. It is the field director's responsibility to ensure that each planned voter contact program is executed on time.

*Regional directors.* Regional directors are usually appointed in statewide campaigns where it is necessary to decentralize the campaign staff.

*Advance person.* The advance person acts as the scheduler's eyes and ears in the field. He or she is responsible for gathering information about the logistics of scheduling opportunities.

*GOTV director.* The get-out-the-vote director plans, manages, and executes the GOTV program.

*Volunteer coordinators.* The volunteer coordinator is in charge of recruiting, evaluating, and allocating volunteers.

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*Research director.* The research director provides analysis of pertinent issues for the candidate and the press people.

*Lawyer.* Every campaign should ask a lawyer familiar with election laws to volunteer on the campaign.

## **Campaign Morale**

The tense, frenetic, non-stop nature of campaigning makes it difficult to manage the campaign staff and volunteers. Typically, staff and volunteers work long hours to meet difficult deadlines. Nerves inevitably get frayed and, at times, inter-office relations become strained. There is also a tendency for staff and volunteers to measure each other's commitment to the campaign by the number of hours worked. As the campaign progresses, staff and volunteers work longer and longer hours. For some staffers the campaign even replaces their family and social life.

While it is obvious that campaign work is not a normal forty hour-a-week job, it is important to curb staffers' tendency to work long hours continually. Staffers who continually work long hours get burned out, lose perspective, and can, eventually, do more harm than good. If the campaign staff constantly works long hours, the campaign will tend to lose touch with reality—a situation that can be disastrous. A good campaign manager can set realistic, healthy working hours through his or her own example that will ensure that staff gets work done while getting adequate rest and relaxation.

Tension can arise between paid and volunteer staff. Paid staff can help ameliorate this tension if they always treat volunteers with respect for their invaluable contributions to the campaign.

## **Hiring a Campaign Consultant**

Hiring the right consultant for your campaign is very important. The Democratic National Committee has a guide to Democratic consulting firms that can help you choose the right firm for your needs. Take time to evaluate the firms on the DNC's list carefully.

To decide which firm suits your needs, define which campaign programs will require the help of a consultant. Once you have defined your campaign needs, find consultants who specialize in the areas where you need help. Call firms that are most suited to your needs; ask them for references from former clients. *Check the consultant's references* and then set up an interview with the consultant. Ask the consultant to bring samples of previous work and, if possible, a work proposal for your campaign. Discuss and evaluate how the consultant will work with your campaign staff, the candidate, and other consultants you might have already hired. Campaigns have the best luck selecting a consultant when they know exactly what they want the consultant to do, what the consultant has done for other clients, and what services the consultant is proposing to do for this campaign and at what cost.

## Voter Contact



contact voters. Every effort should be made to make mail contact as personal and targeted to the audience as possible. The more personal and targeted the contact, the more persuasive the contact.

Once you have defined the audience you are sending a piece of mail to—senior citizens, one particular ethnic group, environmentalists, etc.—develop a message that your polling and other political information says will strike a responsive chord in the audience. The message targeted for each group should also reflect the overall theme of the campaign.

To create a direct mail program, follow these steps.

- Decide which interest groups to target. There are two ways to approach this: by identifying groups that are active in your area and persuadable, or by identifying groups that your candidate has participated in, actively supported, or whose interest your candidate supports.

- Check the availability and size of each group's list. Try to obtain a geographic (precinct count) of each list so you can target your mail more.

- Decide which way you are going to produce the mail piece. Here are seven ways you can produce letters ranked from least to most expensive in terms of production cost: 1) handwritten postcards; 2) mimeographed letters; 3) offset postcards; 4) offset letters; 5) printed letters; 6) computerized personal letters; 7) mechanically-typed personal letters.

- Develop a budget for mailing to different lists. Decide which lists or mailings you will mail at bulk rate, which lists or mailings you will mail first class.

- Select lists to mail to, the production process and mail class to be used, and write messages for each group.

A direct mail program should accomplish each of these steps.

1. Interest groups targeted.
2. List availability and size discovered (See Figure 2).
3. Different production processes priced.
4. Volunteer time to get mail out estimated for each production option.
5. Budget developed for different production options and lists, including mail costs, volunteer costs, and financial costs.
6. Check that there is sufficient information to write messages.
7. Select list for mailing. Production process and mail class are selected.
8. Messages are written for each audience.
9. Material is mailed to target audiences.

The following are helpful tips for a successful direct mail program.

- Do not try to do direct mail in-house. Let a direct mail house do the mailing. They are the experts.

- When mailing to special interest groups, include relevant news clippings and endorsements in your mail package. If possible, try to get the leader of the special interest group you are targeting to sign the mail piece. Include any other endorsements that might sway your audience.

- The quality of the message is as important as the quantity of the mail sent. Take time to produce an effective, clearly printed, well-designed piece.

- Bulk mail will be opened if it is attractive. A teaser—a one line come on—on the envelope, such as “Help get the pollution out of politics” for an environmental piece, will ensure that voters open up your mail.

- A handwritten P.S. at the bottom of a letter is almost always read.

- Include a volunteer card and a contribution card in your mailings in most cases. Make sure there is a business reply envelope (BRE) for the contribution card.

- If you decide to mail in-house, check with the post office before planning all mailings. They should know all the short cuts.

### Other Mail Programs.

*Tabloid Mailing.* Mailing a tabloid, which is generally printed on newsprint with lots of pictures and little copy, is a good way to introduce voters to a candidate. It is important, however, to mail tabloids early in the campaign and, thereby, to lay the groundwork for further voter contact. Producing and mailing a tabloid late in a campaign is not as effective as dropping it early. (Note: A well-planned tabloid can serve many purposes during the campaign. In addition to an initial mailing, it can be used during a door-to-door visit or as handout material at other campaign activities. The tabloid should present many facets of the candidate within the context of the campaign theme. Do not dilute the campaign message in your tabloid, however, by trying to be all things to all people.

*The Invitation.* In most areas, voters are inundated with literature during the last two weeks of the campaign. One way to ensure that your message reaches voters in that important last stretch is to send a letter in a package that doesn't look like a campaign piece at first glance. An effective method is to design a piece of literature the size of an invitation. Then have the envelope addressed and stamped by hand. Have the return address printed on the back side of the envelope and omit the name of the campaign. Voters will think they are receiving an invitation to a party and happily open up the piece.

Remember, mail follow-up to a door-to-door or telephone canvass reinforces the message conveyed by the initial contact. For maximum effectiveness, the follow-up should be geared to a voter's issues preference, revealed during the initial voter contact.

### Literature Drop Programs

The door-to-door distribution of literature is a cheap way to get campaign brochures or tabloids to voters. In Congressional and statewide elections, however, it is often not feasible to distribute literature door-to-door in every area. In those areas the post office will have to suffice.

Although the door-to-door method is inexpensive, there is a hidden cost to door-to-door literature distribution. It is a major organizational task that requires management and volunteer time. Here are a few tips that will increase the effectiveness and efficiency of any literature distribution operation.



## Voter Contact

- Literature distribution is not foot canvassing. Do not ring doorbells to talk to voters. The goal of a literature drop is to save postage costs while getting the same widespread and direct distribution of campaign literature.

- Try to avoid having your literature dropped along with every other candidate's. The party generally organizes a literature drop the last two weeks of the campaign. While this is helpful, your candidate's literature can get lost in a sea of other literature. Literature drops are always more effective if they deliver one message from one candidate.

- Keep track on a precinct map of which pieces of literature have been dropped in what locations. When volunteers distribute literature, make sure they have a map of the area in which they are working and an instruction sheet. Brief volunteers thoroughly. If possible, have adults do your literature drops.

- Never place campaign literature in a mailbox. *It is against the law.*

- Keep tight control over your literature distribution operation. Make sure each volunteer returns extra literature and reports which of the assigned streets were covered.

- Make sure volunteers understand the importance of tightly securing each piece of literature that is distributed. Literature that is strewn across lawns does not leave a good impression with voters.

These steps are necessary to put together a successful literature drop program.

1. Evaluate the geography of areas targeted for literature distribution.

2. Identify areas that can realistically be covered by volunteers. Calculate the number of doors in each area.

3. Appoint a literature distribution coordinator.

4. Recruit volunteers to distribute literature. Get volunteers to commit themselves to distribute to a certain number of doors.

5. Prepare literature (including maps) for distribution and volunteers' instruction packets.

6. Send volunteers out to distribute literature. Send literature in the mail to those areas that will not receive literature door-to-door, depending on the cost of mailing and the importance of the district.

### Lawn and Window Signs

Lawn and window signs serve an important function other than establishing candidate name recognition—they show that home owners or shop owners in a particular area support your candidate. These signs should only be used where you are sure a substantial number will be displayed.

Lawn signs are most effective if they appear suddenly, in substantial numbers, in particular neighborhoods. The blossoming of signs on a date close to the election reinforces the perception that "everybody out there" is supporting the candidate. Early lawn signs tend to disappear through vandalism or as a result of rain and wind.

Organizing lawn signs is a major organizational task. While most lawn signs are cheap to print, the staff and volunteer time used to identify areas where signs can be placed and in putting up the signs is sizeable. One way to cut down on the time involved is to have your canvass operation ask favorable voters if they want a lawn sign. Save the names of all people who want lawn signs until you have a large number. Then call your list and schedule one day for distributing and putting up signs. Obviously, a program like this has to be done out of a local office of a statewide campaign or by a local campaign.

### Graphic and Printed Material

Although all types of media should communicate the basic campaign theme, printed material generally stresses different aspects of the overall message. For instance, brochures can communicate the main theme and any sub-themes important to the target audience. Tabloids can use the campaign theme as it is reflected through issues and the candidate's background.

Draw up an inventory of desired graphic production items. A typical list might include: letterhead stationary, envelopes, bumper stickers, buttons, general brochures, specially targeted brochures, tabloids, direct mail letters, follow-up letters to undecided and favorables, sample ballots, volunteer cards, and door hangers. After each item on the list, note which target audience it is for, the method of distribution, the specific message, the quantity needed, the planned production and distribution dates, and the cost.

When you have completed this process, evaluate the list. How much of this material do you really need? How much are you producing because it is a tradition to have this type of material in a campaign? Which printed material can you really use to win votes?

Once you have reduced your list somewhat, begin making decisions on how to produce the materials. Find a good writer, a designer, a photographer, and a good printer. Identify which material can be done in-house on a copying machine. Will this really save you money? Finally, make sure that all graphics are clear and that the copy for each piece of literature is well written and reflects your campaign theme.

## Figure 8: Sample Instruction Sheet for Phoners

1. Follow the phone script.
2. Repeat the name of the candidate and the name of the office as often as possible.
3. Code telephone lists with a pencil. Mark voter responses once per bracketed household next to the name of the voter to whom you are talking.
4. Always be friendly. If you are talking with a hostile voter, terminate the conversation politely.
5. Read the candidate briefing sheet before calling. Keep it handy for voter questions.
6. Put a line through all disconnected or unreachable numbers.
7. Do not mark busy or no answers on the telephone list.
8. Follow the campaign voter coding system. Remember if the voter refuses to talk and there is no indication of his or her opposition to the candidate, make the appropriate mark next to the voter's name.

## Figure 9: Phoner Tally Sheet

Use cross-hatches only. This sheet records *only* the number of calls.

Name: \_\_\_\_\_

Location called: \_\_\_\_\_

Shift: \_\_\_\_\_

Day: \_\_\_\_\_

Total Calls Completed: \_\_\_\_\_

**Dialed Calls** (use one cross-hatch per each dialed call)

Busy, Don't Answer

Disconnect

**Completed Calls**

Opinion: **For:** \_\_\_\_\_

**Against:** \_\_\_\_\_

**Undecided:** \_\_\_\_\_

Issues Preference: 1

2

3

4

5

6

Vote: **For:** \_\_\_\_\_

**Against:** \_\_\_\_\_

**Undecided:** \_\_\_\_\_

## Figure 10: Tips for Supervisors

1. Each phoner should receive a phoners instruction sheet, a telephone script, candidate brief, tally sheet, phone list, pencils, scratch paper, and volunteer recruitment cards.
2. Make sure phoners are adequately trained on how to code tally sheets and phone lists.
3. During phoning, check to make sure phoners are using the script and marking the sheets correctly.
4. Try to encourage a working but fun atmosphere in the phone banks. Remember, the quality of calls is important.
5. When lists are finished, check to ensure that they were coded properly. Fill in information on supervisor's tally sheet.
6. If someone isn't good on the phone, find another job for them.



## Candidate Activity



on to the campaign headquarters for a personalized reply.

Another contributor to the success of the candidate's appearance is the press person who is responsible for coordinating the media campaign with the candidate's schedule.

When the candidate's schedule is being planned, the media liaison should be consulted about what kinds of activities will draw the best media coverage. The media liaison can also help plan details that will serve as good news items for local reporters.

Press coverage of the candidate's activities requires detailed media advance work to alert and encourage the press and to make sure that all facilities they require for coverage will be available.

The campaign press person should also help evaluate campaign activities by monitoring media coverage to make sure the campaign is attracting good coverage.

## Figure 1: Sample Portion of Candidate/Driver Daily Schedule

- 5:30 AM** Candidate leaves home for 6:30 appointment.
- 6:30-7:30** US Steel Plant Gate, 3rd and Arch Streets, Ambridge.
- Event:** Greeting steelworkers
- Directions:** Take Route 30 South to exit 40. From exit 40 take a left onto Arch Street. Go three blocks to plant gate.
- Park:** At the waffle shop across from the plant gate.
- Personalities:** Arthur MacPherson, shop steward; Al Jackson, union local president
- Materials needed:** Labor leaflets (150); Buttons
- 7:30** **Breakfast** at the waffle shop.
- Telephone** (412) 714-8003
- Event:** Greeting patrons
- Personalities:** Ralph Crandem, owner; Norton Crowell, owner
- 8:00** Leave for radio station WXIX
- 8:45-12:00** Radio Station WXIX, 1400 Tenley Street, Squirrel Hill.
- Telephone** (412) 675-9008
- Event:** Radio talk show
- Directions:** Take Route 30 North to exit 16. From exit 16 take a left on Tenley Street. Go four blocks to the station.
- Park:** In the station lot.
- Personalities:** Uncle Stu Horne, DJ; Jill Fieldstein, station manager
- Materials needed:** Read briefing papers on bridge and road conditions, and Port Authority