

HOW A (SUCCESSFUL) CAMPAIGN WORKS



A Guide for
Building a
Campaign
to Win



INTRODUCTION

This campaign guide is meant to help first-time candidates build and execute a campaign to win. Whether you're planning to run for Congress, the State Legislature, City Council, School Board, or any other public office, thank you!

The commitment of ordinary citizens to participate in government is what makes this country special. By running for office, you are upholding our democratic legacy of public service. Running for and serving in public office is not an opportunity to be loved – politicians are seldom loved – it's an opportunity to do good, and it's a great responsibility. Thank you for accepting this duty to your fellow citizens.

HSG Campaigns is made up of political professionals with over 30 years of combined experience working on hundreds of campaigns all over the United States. While no two campaigns are identical, each campaign shares components that are critical to success.

If you don't even know where to begin, don't worry – this guide is for you.

We will break down the fundamentals of campaigns, including how to raise money, how to develop your message, and most importantly, how to communicate with voters.

Some campaigns need consultants and others don't. If you believe you do, please reach out to us to learn more about how we can help build your winning campaign.







Eric Hogensen
President, HSG Campaigns

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PART 1: THE BASICS

What is a Campaign?

The term “campaign” is thrown around loosely. Often, you’ll hear it as a synonym for an election cycle. (“The 2008 campaign featured Senator Barack Obama and Senator John McCain.”) Other times you’ll see it used as a verb. (“Hillary Clinton campaigned in St. Louis today on behalf of Claire McCaskill.”)

Outside of politics, it can be used to describe a series of military operations or a series of commercial advertisements.

As it relates to a candidate running in an election for public office, this is how we define a campaign...

campaign (noun): An organized effort to elect a candidate by communicating with voters

A campaign has an organizational structure. It might have advisors, or consultants, or staff. It might just be the candidate working out of her garage. It might raise money, it might not have to. But what it definitely has is communication with the electorate – either persuading them to vote for a particular candidate or encouraging them to go to the polls. (Or, usually, both!)

What Every Campaign Has and Needs

Campaigns need to make the best of three key resources:

- 1. Time**
- 2. Money**
- 3. People**

Of these three, time is by far the most critical resource because it is the only one that is finite and dwindling. You can raise more money or find more volunteers or staff, but Election Day will always be on Election Day.

No matter what, you are never going to feel like you have enough time for your campaign. If you are doing it correctly, it will feel like your full-time job. (If you have an actual full-time job, the campaign will feel like your second job.)

Good time management is critical. There will be candidate forums you'll have to attend, meetings you'll need to take, and events where you'll need to make an appearance. But make sure the vast majority of your time campaigning is spent on these two things: **raising money** and **talking to voters**.

For most campaigns, the candidate should expect to set aside about three hours every day to dial for dollars. (See "Fundraising" on page 12)

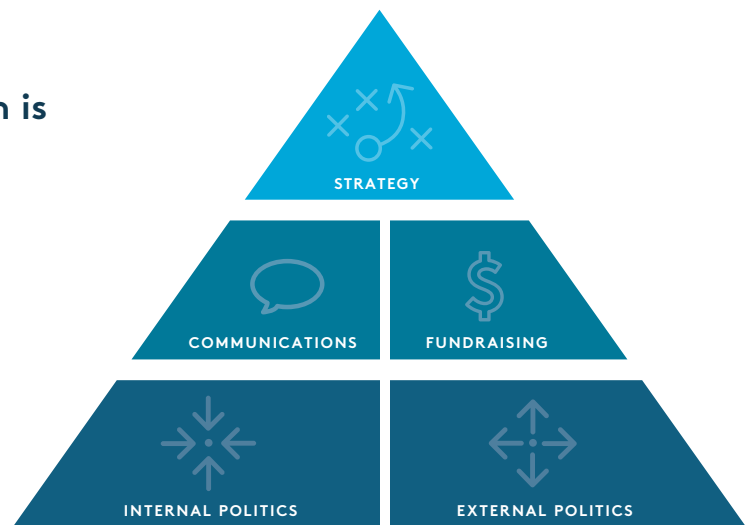
In many campaigns – including ALL local campaigns – the candidate should spend every available weekend and every available weeknight knocking on doors, meeting voters at their homes, and spreading the message.

The Campaign Pyramid

A campaign has six components.

The foundation of every campaign is politics – internal and external.

Internal politics are the candidate's relationship with his team and the team members' relationships with one another. It can even be the candidate's relationship with her spouse.



"External politics" include:

- The mood of the local or national electorate
- The issues of the day
- The demographics of your district
- The political forces who can use their influence in your race (e.g. labor unions, businesses, the charter school movement, environmentalists, 2nd Amendment supporters)

Above the foundation of politics are the activities of a campaign: fundraising, communications, and field. (See PART 2)

On top of everything else is strategy. Strategy is important. Strategy gets you over the top. But strategy comes only when all the other pieces are in place.

Four Things to Remember:

1. Elections are won by candidates – Campaigns are important. The political environment is important. But a candidate with a clear sense of purpose, with a strong work ethic, with intelligence, and with a firm moral compass is who wins votes. Before deciding to run, ask yourself, “Do I have what it takes?”

2. Yes, you need to spend a lot of time fundraising – Most of the campaign won't be spent speaking at large rallies or debating your opponent, it will be spent on the phone asking folks for money. The process does not feel dignified. Remember: It's natural to be afraid of rejection. Rejection will happen. You still need to raise money. Remember: You are asking your supporters to give money to a cause, a purpose, a campaign – not to you.

3. Communication is key – Communicating with voters is the difference between winning and getting zero votes (besides your own). A campaign is all about communicating with voters. Spread the word.

4. Ethics Matter – When running for office you are going for the largest job interview possible. Many people will try to tell you that you can use every advantage possible to win, that politics is a dirty game and you should play to win. But there are some lines that you should not cross. Blatantly lying, taking money from questionable sources, or even breaking the law violates voters' trust and leads to all kinds of problems. Voters care about who you are as a person. More than that, you should care about what you do with their trust. If you are willing to act unethically now in order to win, then you are not the best person to enforce or enact new laws, or to represent your constituents, in the future.

PART 2: THE BASKETS

To make things easy, we always break a campaign into six baskets, along the lines of the six components of the Campaign Pyramid: Strategy, Communications, Fundraising, Field, Internal Politics/Housekeeping, and External Politics. This section outlines the mechanics for each.

Strategy

Strategy is woven into all facets of your campaign, particularly in communications, fundraising, and field. There is no one-size-fits-all strategy. Each candidate is unique. Each district is unique. Each election is unique. So naturally, each campaign will require a unique strategy. A consultant can be help by gathering and analyzing information, contextualizing his or her experience. Polls and pollsters can help you determine a strategy, but they are expensive.

In our experience, there are a few rules of thumb that apply to the strategy of most campaigns:

1. If people don't want to vote, it's not worth your time to change their minds.
2. Very few voters make decisions based on their own self interests. Most voters choose their candidates based on ideology.
3. People need to know who you are and what you stand for before they vote for you. In non-partisan races especially, name identification is (almost) everything.
4. Voters don't usually retain facts about a candidate, only gut feelings they get when they consume information about her. That's why campaigns so readily go negative. In a world where advertisers and entertainers push positivity, the negative feelings we get stand out to us.

A lot of first-time candidates and their supporters like "campaign strategy" because it makes them feel smart and important. But usually the strategy is not very complicated. Know which voters you can actually get to vote for you. Target them with messages that will let them know who you are, leave them with very positive feelings about you, and leave them with very negative feelings about your opponent.

If that sounds obvious, good.

Remember: Presidential campaigns are totally different than any other kind of campaign. The day-to-day media attention they get is non-existent in other races. Strategy, fine-tuned talking points, micro-targeting and fancy models will play a less significant role in your campaign than in a presidential race.

Most important to remember: It's easy to get caught up in strategy and to over-strategize. Executing on the following baskets is what will ultimately help you win.

Communications

A. Your Campaign Message

Your campaign message reflects who you are as a candidate and what your campaign will inspire on the trail. The core of your message needs to be clear, concise, and consistent, whether in a five second sound bite or an hour-long debate.

We recommend every candidate have a message memo that outlines (1) the foundation of their message (including a slogan, sentence, and paragraph that sums up the campaign), (2) a biography (both a long version and a short version), and (3) language for the top three issues of the campaign.

Be sure to remember the "5 C's" when crafting your campaign message. Keep it:

- 1. Clear** – You want your message to be well written, so the voter is not left confused about who you are or what you stand for.
- 2. Concise** – Attention spans are short. Keep the language short. (A good tool is the Hemingway app, which helps users remove unnecessary language from their writing.)
- 3. Consistent** – You need to say the same things over and over again so every voter has the chance to hear it. You will want to change up your message out of boredom. Don't – stick to it.
- 4. Creative** – Voters are barraged with all kinds of messages from commercials, from social media, from emails, and from everything else in their lives. Break the mold. Show them something that stands out.
- 5. Credible** – The information we are most likely to retain is information that is new and surprising. But it can't be unbelievable. Be sure your message conforms to voters' expectations and cite your sources whenever possible.

Another good tool is the Tully Chart – a box divided into four quadrants. The top left quadrant is what you want to say about yourself. The top right quadrant is what you want to say about your opponent. The bottom left quadrant is what your opponent wants to say about YOU. The bottom right quadrant is what your opponent wants to say about him/herself.

Creating the Tully Chart for your campaign is a good way to explore your message, and how to defend yourself from possible attacks.

	CLINTON	TRUMP
CLINTON	<ul style="list-style-type: none"> • Unmatched experience • A passion for public service • Inspiring for women and girls everywhere 	<ul style="list-style-type: none"> • A dangerous man, should not get the nuclear codes • Divisive • A bad businessman • Unethical • In Putin’s pockets • Disgusting treatment of women
TRUMP	<ul style="list-style-type: none"> • A criminal (lock her up) • Benghazi • Her emails! 	<ul style="list-style-type: none"> • The best at everything • “Nobody knows about X better than me” • Will make America great again • Will fix the border • Will bring back jobs

B. Earned Media

Getting a story written about your campaign in the newspaper or a report on local TV news is a great way to get your name and message out to voters without paying for it. That’s why it used to be known as “free media.”

But nothing in life is truly free. Getting your name in the press is hard work. You have to earn it. That’s why we call it “earned media.”

Here are some ways to earn some media:

- **Send out a press release detailing a new policy** – Make it splashy enough that it gets noticed. Even if they don't report it right away, the reporters may keep the information in their hip pocket for a story later.
- **Send out a press release for every significant endorsement** – Endorsements almost never get covered for their own sake, but a reporter will likely mention your key endorsements when they get around to writing about you.
- **Hold an event and invite the press** – Press conferences don't always attract media but organizing a big enough event (such as a major policy launch) can sometimes attract a few bites. Send out a media advisory listing who will be there and what will be discussed.
- **Attack your opponent** – The only creatures more attracted to the scent of blood than sharks are journalists. Send out a press release with some carefully chosen but blistering words about your opponent. It's the bait a reporter is most likely to take.

C. Paid Media

A campaign is like a war. You need your ground forces (volunteers) in the field (Field). You need to raise taxes for the war effort (fundraising). But in a modern war, you need command of the skies. Air cover is critical to a successful campaign. And in a political campaign, that means paid media.

Paid media takes several forms:

- **Television/Cable** – We are all so familiar with political ads on TV, but for most campaigns it's simply unaffordable.
- **Radio** – Radio is very easy to produce and buy, and it's affordable. It's not always the best use of money though, especially in urban/suburban districts with less drive time. (Sometimes, however, there are key demographics you need to appeal to who listen to specific radio stations.)
- **Direct Mail** – Direct mail is the best form of paid media for smaller races because you know exactly who is going to see it. Just like you can knock on the doors of known likely voters, you can send mail to those exact same addresses.

Tip: It is essential to have easy access to high quality, high resolution photos. Make sure there is a place on your website that has them so staff, friends, and supporters can get a photo of you when they need it. Your high resolution photos should be 300 dpi (dots per inch) and at least 2000 pixels on the short side.

- **Digital Ads** – Whether it’s on a newspaper’s website (banner display ad), a video before a YouTube clip (pre-roll ad), or on Facebook (social media ad), digital ads are taking an increasingly important space in political campaigns.
- **Other** – Newspapers will reach out to you for print advertising. Billboard companies will sometimes do the same. And any number of guerrilla marketing tactics can be used. There’s no form of paid media that’s always a bad idea. It often depends on the race, the campaign’s budget, and the target audience.

D. Social Media

The social media landscape changes all the time, but it will play an important role in political campaigns for many years to come. Therefore, it is important to maintain an active presence on social media, focused on expanding your reach.

Tips for growing your social media presence:

- **Invite your friends** – Make sure your supporters are engaged with you on social media. You can invite your personal Facebook friends to like your page and follow you on Twitter, send an email blast to your list with a link to your social media accounts, and make it visible on your website and all digital materials.
- **Post every day** – A couple Facebook posts and several tweets a day should be the minimum of your activity on your campaign pages. If you are not social media savvy, you can probably find a supporter (or staffer) who can do this for you.
- **Advertise** – The cold reality is that your posts and tweets won’t go very far without dollars and cents behind them anymore. Posts and tweets that do well (getting likes, shares, etc.) should be boosted for \$20 to \$100, depending on your budget. This will help spread engagement beyond your supporters and build your reach.

Always remember social media is public. Be sure not to engage with negative comments without thoroughly thinking it through and planning a response. It can be tempting to slap someone down when they leave an uneducated comment on one of your posts but like with all campaign communications, a well-thought-out response is always better than a knee-jerk reaction. Don’t let the trolls take you down.

All campaigns should have a basic website. They don’t need much but should have a link to donate, your bio, and issues that are important. Don’t stress about websites, a clean and simple one is all you need.

Fundraising

A. Determining Your Budget

Estimating the budget for your campaign is a good way to estimate your fundraising goal. How much do you need to raise to win?

There's no magic formula for determining your budget needs, but here are some questions to answer to get started:

- How much money do campaigns for similar-sized races in your area spend? (Federal, state, and local campaign finance reports are almost always available to the public.)
- How much can I do on my own? How much work will I need to delegate to a campaign staffer? How many staffers will I need? What are the going rates for campaign staff?
- How much will access to a voter file cost? (See "Field") How much does a piece of direct mail or a lit piece cost? How expensive is my media market?
- Will I need yard signs? Stickers and/or buttons?

Remember: You always want at least 80% of your budget to be spent on voter communication. Whether that's literature, mail, Facebook ads, or text messaging depends on the race. But communicating with voters is the name of the game.

B. Writing Your Fundraising Plan

Your finance plan will be simple: It's a list of sources for your funds. Who do you need to ask?

Start by writing down a list of everyone you know who can legally donate to your campaign. It's good to do it in an Excel file where you can also have columns for their contact information.

Next, create a "Target" column. Ask yourself how likely each person is to contribute to you. If you know 100% that they will donate, write "A" in that column. If you think they'll probably donate, write "B". If you aren't sure, write "C". And if you think they probably won't, write "D".

Finally, create an "Ask" column. This is how much you'll be asking them to contribute. First, determine how much you think they can afford to donate to you. Second, multiply by two. Third, write it down as the "Ask" amount. (If the ask is over the legal limit, replace the figure with the legal limit, a "max out" contribution.)

C. Targeting Your List and Making the Pitch

There are seven basic contributor relationships. Each requires a slightly different pitch.

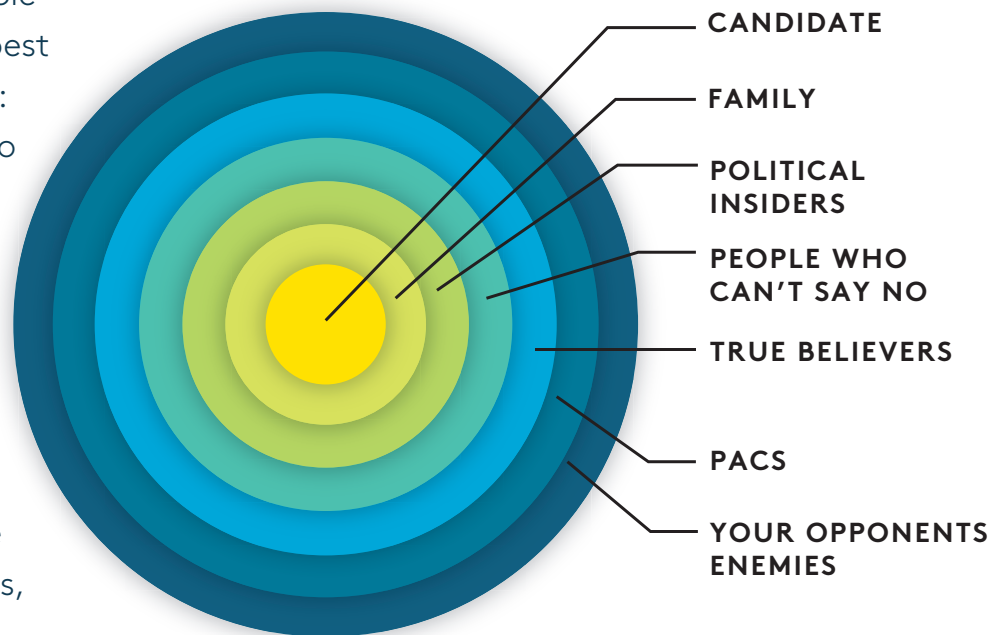
1. Friends and Family - People close to you who have your best interests at heart. Your pitch: "Jim, this race is important to me, and I can win if all my brothers-in-law will help me. I really need you to make a contribution of one thousand dollars. Will you do that?"

2. Political Insiders - People who like being around politics, power players, and frequent political contributors. Your pitch: "Jill, I need you on my team. Together we're going to win this race. Then we'll go to Washington and put things right. But first I need your help. You need to be in this race for one thousand dollars. Will you commit to that?"

3. People Who Do Business with the Government - These are sophisticated players who understand investing in access. Your pitch: "Joe, I appreciate your help in this race. I look forward to working with you when I'm elected. I can win with funding and I need you to be in this race for \$1,000.00." The simple overture of access is all that's necessary. NEVER, EVER, offer a quid pro quo.

4. People Who Believe in a Cause - Usually there is not a lot of money here, but some contributors will only consider you if they know you share their views on a particular cause or causes (choice, climate change, gun control, etc.). Your pitch: "You know I am running to safeguard reproductive choice. I will win with your help. Will you give or raise one thousand dollars for my campaign?"

5. People Who Can't Say No to You - You have vendors or business associates who depend on you for part or all of their livelihood. Don't be shy. Your pitch: "Jessie: our firms have been doing business for 15 years. This race means a lot to me and I need your help. Can you please give one thousand dollars to my campaign?"



6. People Who Really Hate Your Opponent - Every politician who takes a stand on any issue makes enemies. However, your opponent's enemies – both individuals and organizations – are a prime source of money for your campaign. Just call them up and say you're running against so-and-so and chances are THEY'LL ask YOU how to contribute.

7. PACs - Political action committees (PACs) exist for the sole purpose of doling out money. PAC directors are professional political investors. With few exceptions, they are much more conservative with their dollars than a donor. You must be viable in your race and acceptable to their organization. You must be able to prove you can raise money from your network first. If polling exists, you need to poll well. You need to show you understand the district's demographics, you know the win number, and you have a plan for victory. You'll need to fill out a questionnaire and do a PAC interview. NEVER RELY ON PACs for your fundraising plan.

D. Fundraising Tactics

There are many things you can do to raise money. The following list outlines those activities. They are written in order of effectiveness.

- **Candidate Call Time** - This is sometimes referred to as "dialing for dollars." Most candidates absolutely hate it. The ones who win do it anyway. The way any campaign will make the most money is from the candidate. They must telephone or visit potential large donors and ask for a contribution. The candidate should be familiar with the donor's contribution history, job, and other relevant information. A finance staff can prepare that information in "call sheets." The goal of each call is to close the deal and get the maximum pledge possible.

The candidate should not begin the call by asking for a pledge. The candidate should introduce themselves, connect or re-connect with the person, listen to what the person is saying, find out what their needs are (what they care about), and then show them how s/he will meet their needs. The candidate should discuss the race, solicit their opinion, and outline his/her case for winning the race - starting with the campaign's main message/theme.

The candidate must ask the potential donor for a specific amount. Assume support. Once the ask is made, stop talking and wait for a response.

The candidate must close the deal - make sure they agree on the amount of the contribution and when s/he will fulfill this pledge. The candidate will call and ask large- and medium-dollar donors.

- **Finance Committee** - An effective finance committee expands the donor base of a candidate, raising money that the candidate does not herself have access to. Successful finance committee members use the same techniques to identify potential donors as the candidate (close friends, family, business partners), contact them, and connect them with the candidate for an ask to be made.
- **Fundraising Events** - These are the scorn of fundraising professionals. They are time consuming and sometimes costly. But they can be of great utility if used correctly. They can be used as contribution deadlines and motivators for finance committee members (and the candidate). Sometimes they generate good publicity for the campaign.

The key to a strong event is to begin planning as early as possible. (45 days in advance is a good rule of thumb.)

Keep costs minimal. See if the hosts can contribute food and drinks in-kind. Remember that only about 10% of your invitees will attend, so if you want 40 people there, invite 400 people. Make RSVP calls. Have clear goals for the event. If someone pledges for an event but does not attend, follow up with them to get the check.

Low-dollar fundraising events can also be useful for building a connection with people in the community. There are plenty of people who cannot contribute large amounts but would love to have pizza with you and donate \$25. This makes them feel like they are doing their part and can build strong connections.

- **Fundraising Emails** - Email blasts that ask for money can provide a steady stream of income for the campaign, but it's a low stream. (Sometimes you hear about candidates raising the majority of their money online from low-dollar donors. Those candidates are running for president. You're not.)

Nevertheless, we recommend sending an average of one fundraising email per week. At the start it can be a little slower – you don't want to burn out your list too quickly. Closer to the end, you should be sending these emails about once a day.

Fundraising emails will go to your personal list of contacts. You may need to grow that with an email acquisition program.

- **Direct Mail Fundraising** - Unless you are running for a statewide office without a primary challenger, we don't recommend using direct mail for your fundraising efforts. The costs are very high, and the ROI is typically under 5%.

Field

A. Determining Your Win Number

Your win number is, quite simply, the number of votes you need to win. In a two-person race, that means you need 50% of the expected turnout, plus one vote. (50%+1)

Estimating voter turnout in any election isn't easy, and it's not an exact science. There's an art to it, and a local politico can usually help you. But generally, you want to look at what turnout has been in recent and similar previous elections in your district. Recent means in the last 4 election cycles (eight years). Similar means the office was similar, the political climate was similar, and the other races on the ballot were similar to what your election is going to be.

Example: You're running for State Assembly. It's an open seat. The previous incumbent had been there for 10 years. BUT there was a State Senate race in the district 2 years ago. Turnout was 49%. The election cycle 4 years ago was very similar to this one – a presidential year and a competitive U.S. Senate race. Turnout was 55%. You can probably expect turnout to be about 55%. (This way, even if it's lower, you'll be safe with a small overestimate.) In the last 2 years, registration has increased to 48,000 voters in your district. You can expect about 26,400 votes to be cast. Your win number is 13,201.

A simple tool for calculating your win number can be found here:
<https://www.wellstone.org/resources/win-number-calculator>

B. Voter Targeting

In every race, there are three types of voters: Those who you don't need to persuade (they're with you); those who you need to persuade; and those who you'll never persuade (they're against you).

Among each kind of voter, some will vote regularly, some will vote with a reminder, and some will rarely ever vote.

Who you target for voter communications – and what you communicate – depends on both dimensions.

	WITH YOU	UNDECIDED	AGAINST YOU
ALWAYS VOTE!	This is your base. Let them know you're active, but don't waste time or energy courting them. They're in the bag.	This is the group you will focus on the most: Persuadable with a high propensity to vote.	They won't vote for you. They'll never vote for you. Don't waste your time trying to change their mind.
SOMETIMES VOTE	This is your "get-out-the-vote" (GOTV) universe. You don't need to persuade them to vote for you – you need to persuade them to go to the polls.	Persuadable with a medium-propensity to vote. Make sure you target them. If you think you're winning them, remind them to vote.	Even if they do vote, it won't be for you. Don't waste your time.
ALMOST NEVER VOTE	If by some miracle they vote, great! But it won't be your doing. Don't waste your time on them.	They won't vote. Don't waste your time on them.	They won't vote! Congratulations. No need to go anywhere near this group.

If you're having trouble figuring out who's who: What differentiates you from your opponent? Party? Ideology? Ethnicity? Gender? Typically, that's how these groups are sorted. Someone's likelihood to vote is based on how often they've voted in the past. Your voter file (e.g. VoteBuilder, PDI, L2) will help you figure out each person's propensity to vote.

What's a voter file? It's a database of all the registered voters in your district. You can use it to create targeted lists for mailings, phone banks, and other forms of voter contact. You can also add codes to each voter in the database. For example, if they said they would vote for you, you can log that information in the voter file and retrieve it later. Reach out to us for more information about voter files in your race.

C. Voter Contact

Alright, you know who to target but how do you talk to them? Voter contact can be done in a variety of ways but the best and most effective way will always be direct contact with the candidate. You are the most effective resource, but you have limited time.

- **Canvassing** – This is the process of going door to door and asking people for their votes. This is done by both volunteers and paid staff (if you can afford it). Canvassing is the most effective form of voter contact as it gives people a direct connection to your campaign and lets them interact. However, it is also the most expensive and least efficient form of campaigning because it involves going door to door where many people are not home. Don't be concerned when your Not-Home numbers are higher than everything else. It is expected and doesn't make it a waste of time.
- **Phone Banking** – Phone banking is just like it sounds, calling people on the phone and asking for their vote. Best handled by volunteers. Phone banking is less effective than canvassing but far more efficient. Phone banking is a great way to engage older volunteers who cannot walk a precinct but still want to be involved.
- **Texting** – Rounding out the trio we have the least effective but most efficient way to contact voters, sending out text messages. It is quick and low-effort and can be used when you have volunteers who are timid on the phones or only have a short amount of time to help. Texting is quick enough that it is often possible to text every voter in the district.

Keep track of your data. You have your canvassers out and phone bankers calling - in essence you are conducting your own highly-inefficient poll. It is vital that canvassers and phone bankers are keeping track of who says they will vote for you, who is undecided, and who is voting against you. This gives you a great list for retargeting later and gives you an idea of how you are doing. Keep this data as it will be important in GOTV.

D. GOTV

It is the weekend before the election, you have canvassed all your priority precincts, and called through a ton of people. Now it is time to get your people to the polls.

Most voter contact is all about persuasion: spreading your message and introducing yourself. In the last days your focus moves to turnout: making sure the people who support you actually get out and vote.

There are two kinds of voters to include in your GOTV universe:

- 1. Your base** – These are the voters who are naturally aligned with you. In a general election against a Republican, these are the Democrats. But not just any Democrats. These are the Democrats who are low-to-medium-propensity voters. The ones who don't always show up.
- 2. Your IDs** – These are the voters you persuaded and are now identified as your supporters.

You want to contact your GOTV universe the same way you contact all voters: by canvassing, texting, and calling. But you want a new script that reminds the voter when the election is, what hours the polls are open, and where their polling place is.

Tip: Ask the voters in your GOTV universe if they have a plan for voting on Election Day. If they don't, the question will force them to start making one. And forming a plan to vote is the way these voters will remember to go to the polls.

Internal Politics/Housekeeping

This is the internal politics of a campaign: Your team. Campaigns attract a lot of competitive, political people. Sometimes that means they won't always get along. But a functional campaign organization needs harmony, cohesion, direction, purpose, and leadership. To some extent a campaign manager can help run those operations. To some extent you need to too.

A. Staff/Consultants

Do you need a staff? How many? How much should you pay them? What about consultants? Do you need a general consultant, or will some vendors do?

These are all questions you will need to feel out for yourself but start by looking at what other campaigns of your size in your area do. You can review campaign finance reports to see what similar campaigns do.

Remember, it's important to start earlier rather than later. Even if you can't afford to pay someone right away, lining them up is important. At the very least they can steer you in the right direction in the months before you can hire them.

B. Compliance

When it comes to campaign finance reports, you need a treasurer – someone to keep track of the money. This is about more than having an accountant. This is someone who will keep you compliant with campaign finance law.

Every state has campaign finance laws that dictate what information you need to report, what legal disclaimers you need to include on your advertisements, what the legal contribution limit is, and more. We strongly recommend hiring a professional treasurer to help you with these important tasks. If you accidentally violate a campaign finance law, you lose the trust of many would-be voters.

External Politics

Campaigns do not exist in a vacuum. They operate within an existing political environment. When you decide to run, it's important that you reach out to the following groups and individuals for advice and (in time) endorsements.

- **Local (friendly) elected officials (current and former)**
- **Your local Democratic Party organization**
- **Local labor unions**
- **State organizations (women's rights, environment, etc.)**
- **Community associations**
- **Homeowner/tenant associations**
- **Faith leaders**

You probably already know a few individuals or organizations to reach out to. When you take a meeting, be sure to ask them who else you should be meeting with.

PART 3: THE CHECKLIST

The following is a list of tasks you will need to complete to launch a successful campaign. While some of these might not necessarily apply to your race, we guarantee that most will. You can check off the box when the task is done.

- You know why you're running
- A Treasurer is chosen
- The bank account is set up
- The "campaign committee" is set up
(this is campaign finance paperwork)
- A campaign consultant is chosen
- A fundraising consultant or assistant is chosen
- The fundraising list has been targeted
- A system for accepting online donations is set up
- The process for getting on the ballot is understood
- Business cards or literature are created
- A photo shoot is executed
- A website or "splash page" is set up
- All the social media accounts are set up
- A voter file is purchased
- The campaign plan is finalized
- The "elevator pitch" is memorized
- A campaign announcement (or kick-off event) is planned