THE CAMPAIGN PLAN

The campaign plan is one of the most critical elements of a winning electoral campaign. A strong plan serves as a roadmap to achieve the goal of winning an election. It allows the campaign to maximize scarce resources to meet specific campaign goals.

- The plan identifies what you need to win – it clarifies the campaign goals, challenges and opportunities
- It is realistic and establishes campaign and candidate credibility.
- It keeps the campaign on target and on message and helps create consensus and coherence among campaign organizers, supporters, leadership and the candidate.
- It provides focus and direction to the campaign – especially in crisis – and allocates scarce resources (time, people and money) most effectively.

KEY RULES FOR SUCCESSFUL CAMPAIGN PLANNING

Rule #1: The most important rule about a campaign plan is that it be written down. When you are ready to run, the plan should be written and shared with your close advisors, who may also help you develop and implement the plan. Too often, the plan is in someone’s head, which does not help in a crisis, nor does it help build credibility either with community groups who might support you or the party leadership who is deciding whether to invest resources in your campaign.

Rule #2: The most valuable resources — time, people, money — will always be scarce. There will be too little time, not enough people to do the work and never enough money to do all that you hope to do. Campaign planning helps target these limited resources effectively.

Rule #3: A good plan is based on knowing your win number and organizing your campaign to achieve that number. You have to know where you need to end up, before you start to plan.

Rule #4: Things take longer than they should (or you think they should) and will cost more than you think they should. The campaign plan must not be integrated with budget and fundraising plans. It is important to write this plan with some sort of cushion for the inevitable hiccup or unforeseen event.

Rule #5: Anticipate the unexpected. Good planning considers contingencies and builds in room to address the unexpected.

Rule #6: It is vital for your campaign, candidate and staff to know the rules and laws that govern your campaign. Every detail matters, for two reasons. The first is you want to maximize every opportunity within the rules and laws of your campaign so full advantage is taken. Second, if you are running a campaign, one small mistake, whether intentional or not, can give the opposition an excuse to end the campaign with what they say is the law on their side.
For each element of your campaign plan, you need to answer the following questions:

- **What** needs to be done?
- **Who** will do the work?
- **When** will the work happen?
- **How much** will it cost?
- **Why** is it necessary to win?

**ELEMENTS OF AN EFFECTIVE CAMPAIGN PLAN**

**Research, Message and Communication**

- **Message.** Message is the campaign’s core argument. A campaign message needs to be clear, concise, and compelling to the voter. It should provide a contrast to your opponent and be repeatedly constant.

- **Research.** Research is necessary to understand your opponent’s strengths, weaknesses, public profile and positions on the issues. Research on your own candidate’s public profile is also essential. Finally your campaign will want to research various policy issues in order to communicate your candidate’s positions and refine your message.

- **Paid media.** If you campaign intends to utilize paid media, you must decide which media you will utilize and attempt to dominate it. Paid media includes radio, TV, newspapers, direct mail, Internet advertising and lit pieces.

- **Earned media.** Every campaign needs an earned media strategy that will garner press coverage and focus public attention on your candidate. Your campaign needs to consider how to generate attention through press events, letters-to-the-editor, talk shows, editorial boards, blogs, the Internet and so forth.

**The Field Operation - Direct Voter Contact**

- **Targeting.** Targeting maximizes resources and drives decisions about which voters to contact, how to contact them and how often. The main tool for targeting is the voter file, but also might include census data and other voter information sources.

- **Base Building.** In addition to the voter file, which allows us to target geographically, a campaign can also win by expanding the base through direct relationships with organizations and leaders such as teachers, seniors, veterans, communities of color, new Americans, youth, etc.

- **Voter Identification.** The voter ID program is done early in a campaign in order to identify supporters, opponents and undecided voters in order to efficiently allocate resources.

- **Persuasion Program.** The persuasion program is aimed at convincing undecided voters to move into the support column. It involves conversations at the door, on the phone and through the mail.
- **Get-Out-the-Vote.** The culmination of all the work of the campaign, the GOTV program needs to be exceedingly well planned and executed.

**Budget and Fundraising**
- **Budget.** Campaigns require a realistic budget based on the goals and objectives of the campaign plan. See attached budget sheet.
- **Fundraising.** The plan for raising funds flows directly from the budget. Given the amount of money that needs to be raised, how will the campaign accomplish its goals? What are the sources of money and the timeline for getting it?

**Campaign Organization**
- **Organizational Structure.** Who will be responsible for the major functions of the campaign? Will those positions be paid or volunteer? Some attached list of major roles and responsibilities in the campaign.
- **Volunteer organization.** How will the campaign effectively utilize volunteers? How will volunteers be trained and managed in order to give the maximum advantage to the campaign and also be fulfilling for them. What are some ways that volunteers can be encouraged to use their creativity and skills on behalf of the campaign?
- **Technology.** How will the campaign utilize technology (internet, social media, email, database) to communicate with the public, donors and volunteers, organize its resources, and manage data and volunteers?
- **Scheduling.** How will the candidate’s time be prioritized and who will make those decisions?
- **Timeline.** Working backward from Election Day, decide how everything fits together? When will staff be hired, voter contact begin, what is the schedule for paid media, etc.? Everything on the timeline will have to be aligned with the budget.
  - Commit the plan to paper. Your campaign plan is your roadmap. As the campaign develops, the campaign plan evolves as well, but a good campaign plan and budget helps prevent responding to the other campaign and letting your opponent set your agenda.