



## Campaign Plan Template

**Objective:** This is a template designed for 2021 campaigns with options for in-person or virtual. This plan should be adaptable to most levels of campaigns. Organize your campaign plan as you see best, however your campaign plan should answer (or plan to answer) the vast majority of the questions listed in this template. Campaign plans are living documents that are edited throughout the campaign.

**Note:** If you are running in a primary you need to make distinctions between your plans for the primary and for the general. Expect to heavily adapt the general strategy after you win the primary based on what you've learned in your first election.

**Note:** If you are running again either for re-election, after a loss or for a different seat, you need to acknowledge what worked and didn't work in your previous campaigns. Don't let your campaign get complacent.

### Candidate Information

- Candidate Bio
  - Can be the website version or something more in-depth.
- Who is the candidate?
  - Why is she running?
  - What are her strengths and weaknesses?
  - Who are the major people in her network that can be helpful either as donors, staff, or boots on the ground.
  - Does the candidate have existing ties to the party/influential non-profits/boards & commissions/media/faith communities? How can each of these pools be tapped into for support?
  - Does your candidate have campaign experience in any capacity?
- Opponent(s)
  - Who is your opponent in the Primary and the General? There may be multiple.
  - What are their weaknesses/strengths?
    - It is very important to note if any of the opponents have campaign experience, has strong ties to their party, or is independently wealthy.
  - Is your opponent seen as an authority on a certain issue or in the community?
  - What networks do your opponents have access to?
- Lay of the land
  - What else is going on in this election cycle that will affect the campaign?
  - What makes this campaign compelling?
  - Is this campaign part of the wider statewide (or countywide/citywide) strategy and why?

- Endorsements
  - Do you have any and which ones are you seeking?
    - Note: If there are endorsements you're seeking you need to reach out to those people or organizations. Most organizations you have to ask for their endorsement, it's not handed to you, and also ask what their timeline is and how they plan to announce endorsements.
  - Are there any notable people who would publicly endorse the candidate?

### **Staff Roles**

- What is the candidate responsible for? (Hint: The candidate's only two jobs are raising money and talking to voters. You do need to elaborate on what this looks like for your campaign.)
- What is the manager responsible for? (This can be a condensed job description.)
- Who is in the kitchen cabinet and what is every member of the kitchen cabinet's roles?
- Is there anyone else on staff or in a staff-like volunteer position? Finance assistant? Field organizer? Volunteer coordinator? Intern?
  - If you do not have someone in these roles in the early stages when you're writing the plan, list out when you expect to hire these people and what their jobs will be. Also list if these are paid positions and how many hours per week they can expect to work. Make sure to include their salaries/stipends in your budget.

### **Calendar**

- What is the campaign's plan to stay on schedule? Who should be shared on the digital calendar?
- What are the candidate's time constraints? Does she work or have a lot of family obligations?
- When are the finance filing deadlines?
- What are big events that you know the candidate will need to attend?
- When is early voting and the election?
- When will the candidate be out of town or less able to commit the necessary hours to the campaign?

### **Communications Plan**

- Tip: Day one, make google alerts for the candidate, her campaign manager, the opponents, and their campaign managers.
- Platform
  - What is your platform? What issues are you running on?
  - What does your candidate care about these issues? Is it personal for her in any way?
- Message Box
  - What are you going to say about yourself?
  - What is your opponent going to say about you?
  - What are you going to say about your opponent(s)?

### The Message Box

Us on Us	Them on Them
Us on Them	Them on Us

- Paid Media
  - What is your paid media high, middle, and low budget?
  - What will you spend the money on?
    - Mailers, TV, Billboard, Newspaper ads etc.
    - Generally, when will these purchases be made and go public?
- Earned Media
  - Is your candidate already a public figure or has been in the news recently?
    - How can you use their existing media presence?
  - Is your opponent a public figure or has been in the news recently?
  - Is there an issue that your candidate is somewhat of an authority on or has a lot of experience with? Will your candidate be able to capitalize on her authority when this issue comes up in the news? Is there a way to get this issue in the media?
  - Will you plan to write op-eds or letters to the editor? Will you have surrogates doing this?
- Digital Engagement
  - What is your social media plan for both paid media and unpaid media?
    - Think budget and timing.
  - What social media platforms are you using? Who is running each account? How will the content you post on each account differ?
  - Do you have a communications calendar?
  - How will you promote events?
  - How many broadcast emails do you plan to send per month? Are you planning a newsletter? Who will write these? Who will proofread them?
  - What is your website going to say? Who will build it? Who will update it?
    - Keep your URL simple and buy other domain names that feature your name.

## Fundraising Plan

- Staff roles and databases
  - Who is the treasurer? What are their expectations?
  - Are you using NGP? What credit card processing company are you using?
  - What is everyone's job regarding the money?
  - What is the income process regarding checks and credit card contributions?
    - Example: Manager collects checks from mail/events/donors and gives them to the treasurer who takes them to the bank. Once they're in the bank the CM enters the amounts into NGP and applies the appropriate source code.
    - Best practice is to have two people processing the money for greater oversight.
- Fundraising Goals
  - Overall, Quarterly, Monthly, Weekly
    - Weekly will fluctuate based on events, PAC checks, and endorsements, but you should have a sense of how much money you want to raise weekly in call time and online.
    - How many hours per week will the candidate attempt to be in call time? Who will sit with her and keep track of everything? Who will prep the lists and scripts?
  - What are your high, middle, and low budgets?
    - What will you spend money on if your fundraising isn't what you planned it would be in the beginning?
    - How will you track your income?
  - What are your goals for the various fundraising pathways?
    - Call time, events, online donations, direct mail, PACs, in-person meetings
  - What are the donor pools you'll expect to raise money from?
- Spending
  - What are you spending money on and when?
- Events (some of these only apply to in-person or virtual and some of these questions you won't need to work out until you have an event to plan.)
  - You may need to book venues far in advance.
  - You should have at the very least 4 weeks to promote an event. Assume two weeks to get your committee. If the event is in-person 6 weeks is better. For events over 200 guests plan on at least 2 months of promotion.
  - Who would you ask to host an in-person events?
  - Who will draft the agenda?
  - Who can serve on your host committees? Who on your staff will attend and how can they assist?
  - How can you make your event unique (this is more important for virtual)? Can you feature someone typically not in attendance at a fundraiser (musician, chef, artist, etc)? Who can you ask to speak (other elected, typically)?

## Field Plan

- District Outline
  - In what county or counties is the district?
  - What are the major towns/cities?
  - Where are the democratic strongholds?
  - Is this a newly drawn district and if so what are the implications?
  - What are the demographics?
  - What areas are canvassable?
- Win Number & Field Goals
  - What is your win number and vote deficit?
  - How will you overcome your vote deficit?
  - What is your persuasion universe and GOTV universe?
  - How many doors do you need to knock?
  - How many calls do you need to make?
  - Who will text bank?
- Volunteer management
  - How many volunteers do you need?
  - How will you recruit volunteers?
  - Who will be your volunteer leaders?
  - Where will you host phone-banks and launch canvasses?
  - How often will you phone-bank and canvass?
- Timeline
  - When will you begin volunteer recruitment?
  - When will you begin persuasion?
  - When are your Dry Runs and GOTV?