

**THE COMPLETE GUIDE TO**

# **Getting Your Campaign Off the Ground**

**By Joe Garecht**

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## **I. Should You Run for This Office?**

The idea of running for political office is exhilarating and consuming. There are issues to be worked out, strategy to be planned, money to be raised and doors to knock on. Candidates who think about running often just plunge right in, without spending much time deciding whether or not they should make the commitment to run in the first place.

This section introduces some questions that every candidate, for every office, should think about before deciding to run for office. The issues are wide-ranging. Some are specific, others more generic. Use these questions to think through and answer the first question on every potential candidate's mind, "Should I run for this office?"

There are no right or wrong answers. You may have some issues that you need to work through before running, but that shouldn't stop you. Ultimately, the choice whether to run or not is yours. The main things you should consider in making that decision are:

- Can I make the commitment to run for office?
- If I win, will I want this job?
- Is it possible for me to win this election?

Work through the questions in this section. Talk about them with your family and advisors. Use the margins to jot down notes and questions. Then make an informed decision... Should you run for this office?

### **1. What office are you thinking of running for?**

The first step any candidate for political office should take is to carefully research the office he or she is thinking about running for. This is a step that is often overlooked. Many victorious candidates are surprised by the amount of responsibility they have taken on, and many would-be office holders are stumped when asked questions about a job description they know nothing about.

Most political offices draw their job descriptions from state constitutions, local charters, and state and local law. These documents can often be found online, and are usually available at the county or city clerk's office or election bureau in the district you plan on running in. Federal offices take their job descriptions from the U.S. Constitution, as well as subsequent congressional legislation. To determine what the office you are thinking about running for actually entails work through the following steps:

#### *State or Local Offices*

- Check the state constitution and/or local government charter.
- Speak with an elected official who holds the same job you plan to run for, but in a different district.
- Talk with party and community leaders.
- Attend public meetings of the board, council, or executive post you wish to run for.

### *Federal Offices*

- See what the U.S. Constitution has to say about the office you plan to seek.
- Speak with the staff of an elected official that holds the same level office you plan to run for.
- Watch C-Span and other government programming to see Federal legislators in action.

When you're researching the office you are planning to run for, keep the following questions in mind:

1. What are the official duties of this office?
2. What kind of time commitment is required?
3. What is the salary for this office?
4. What are the "unofficial" or customary responsibilities of this office?
5. Does this position have a staff? Office space?

Find out everything you can about the office you plan to seek – it will be a great help as you plan the rest of your campaign.

## **2. Why Do You Want to Run?**

Many candidates have very good reasons for wanting to run for office, but they can't succinctly explain those reasons when asked. Before you plan your campaign, you must know "why" you are running for office. This statement will be a work in progress, but you should have both a short, summary answer and a longer, more in depth answer prepared before you plan the rest of your campaign strategy.

The answer to the question "Why are you running for this office?" should be like a mission statement for your campaign. It should rely both on your particular strengths and issues and your opponent's particular weaknesses and how they effect performance in this particular office. As your planning progresses, this mission statement will be incorporated into your message and overall strategy.

## **3. Do you have Your Family's Support?**

Don't get caught up in the euphoria of the political campaign without first asking yourself what kind of strain the campaign will put on your family. Political campaigns are stressful. They take time, money, and hard work. Speak with your spouse, children, parents, siblings, in-laws, and any other family you are close to and explain to them why you want to run for office. Listen to their concerns and opinions. Include them in your decision process.

If you start your campaign without consulting with your family, you may end up biting off more than you can chew. Your family's support is critical to ensuring that you can devote enough time and resources to the campaign to make it a success.

#### **4. What is Your Political Ideology?**

Do you consider yourself a conservative? A moderate? A liberal? How do other people who know your views see you? While labels like these aren't as important as they once were, your general positions will greatly impact your campaign strategy. Take some time to think about where you fit in along the political spectrum.

#### **5. Is There Anything in Your Past That May Become an Issue?**

We all have some things in our past that we would rather forget. A misstep here and there should definitely not preclude you from running for office. However, before running, take an honest assessment of your past. Is there anything that you have done that may become an issue in the race? Some of these potential issues include:

- Have you ever been arrested?
- Have you had an alcohol problem?
- Have you ever used illegal drugs?
- Have you ever belonged to a racially exclusive country club?
- Have you ever published anything that was controversial?
- Have you been involved in a nasty divorce proceeding?
- Have you ever had an affair?
- Have you owned a business that failed?
- Are there any other issues that may come up from your past?

Many potential candidates think that they can hide the issues from their past. They often find out that they are wrong. At some point in this campaign or a future one, someone will find out about whatever you are trying to hide. By taking an honest assessment of your past right at the start, you can better decide how to respond to these revelations, as well as determine whether you should beat your opponent to the punch and disclose these skeletons on your own, using your own spin.

#### **6. What is Your Financial History?**

Similar to looking into your personal past, you should look into your financial past to see if there is any transaction that may become an issue in the future. Some questions you should ask yourself include:

- Have you ever filed for bankruptcy?
- What groups and candidates have you financially supported?
- Are you willing to release your past income tax returns?
- What is your net worth?
- What about your spouse? Children? Parents?

## **7. What is Your Current Financial Situation?**

You must also determine what your current financial situation is. The most important questions dealing with your present finances are whether you can afford to run for office and if you can afford holding office. Running for office can be a costly endeavor. Even if you can raise enough money to support the entire cost of the campaign, you will probably need to take time off from work or other income generating activities to spend time campaigning. Can you afford to do this?

You should spend time to determine how much money you are personally willing to spend on the campaign, as well as thinking about the total amount of money you will need to win the race. The best way to figure out how much it will take to mount a credible campaign is to talk to politically active members of your community, particularly current and former office holders, campaign managers, and party officials.

Also, start making a list of possible contributors to your campaign. Think through your list of friends, family, business associates, former classmates, fellow club or association members, and colleagues who you will approach to contribute to your campaign. While it is not important that you finish this list just yet, starting this list will help you visualize your potential pool of donors for start-up funds for your campaign.

## **8. Who are Your Potential Opponents?**

Check in with the local party organization, talk to community leaders and keep an eye on the newspapers. Who will be your likely opponent(s)? Will there probably be a primary, or will you be able to run unopposed? Is there an incumbent already occupying the office, or will you be running for an “open seat” (one in which the incumbent has retired, died, or otherwise will not be running for re-election)?

If you’re starting to prepare for your campaign early, it may not be immediately clear who will run against you, but you should be able to draw up a list of possible candidates by researching the issue and networking with leaders and activists in your community.

## **9. What are the Major Issues That May be Raised?**

Again, if you’re starting your campaign early, these issues may not be clear from the outset. The issues you will raise and your lines of attack will be chosen when you start writing out your strategy and campaign plan. When deciding whether or not to run, it is important that you note what issues are in the news in the district you want to run in, what issues your possible opponents are interested in, and what issues are likely to be raised during the election.

## **Should You Run?**

Researching and answering all of these questions should help you decide whether or not you want to run for the office you are contemplating seeking. Don't let these questions get you down, or make you think that running for office is too hard or impossible. While it's important to make an informed decision about whether or not to throw your hat in the ring, it's equally important to remember that politics is an exciting, noble venture. You may have found some weak points during this decision making process, but you'll probably have found some strong points as well. It's time to make your decision... are you ready and willing to fight the good fight and run for office? If the answer is "yes," then let's get started...

## **II. Getting Ready to Run**

One mistake that most political candidates make during their first run for office is waiting too long to get started. No matter what level office you are running for, or thinking of running for, it is never too soon to get started. Of course, there are many activities that the candidate can't perform until the campaign is under way. There are many things, however, that candidates and potential candidates can do well in advance of Election Day to put them in a better position to win. Below are several steps that candidates can take to help them prepare for a run for office, whether that campaign is next year or "some year":

### **1. Tour the District**

Candidates need to know their district. While your "tour" of the district need not be a formal or announced effort, you should be sure to spend time in every corner of the district, learning about the businesses that affect the local economy, the issues that are important and the demographics of the area. Walk the neighborhoods. Eat in the restaurants. Shake hands and spend time listening. Other possible activities include:

- Spending a day in local businesses and factories
- Visiting schools and nursing homes
- Stopping by local churches
- Attending community events

While you take time to learn the nuances of the district, spend time researching the demographics of the district as well. Look over maps and study prior election results. Both maps of the district and prior election results, broken down by precinct, should be available from the county, town, or state clerk or election board.

### **2. Go to Meetings**

One of the best ways to learn about issues and meet community activists at the same time is by attending the meetings of every local group that you can. This includes meetings for your local political party, as well as community organizations, service groups, town watch committees, town council meetings, and anywhere that issues of import are discussed and local leaders congregate.

Attending these public meetings serves a dual purpose. First, it allows you to familiarize yourself with the issues that are important to the community, which are likely to come up during the campaign. You'll be able to hear both sides of the issues at these meetings, both from elected officials and voters alike. The second reason to attend these meetings is to see who the community leaders are, who is following them and how they lead. It's important to see which activists, politicians, and citizens are swaying public opinion in the local community.

### **3. Meet with Leaders**

Organization meetings aren't the only place to speak with local leaders. Take the time to visit with various leaders or speak with them on the phone. Try to get together with political, business, community, and church leaders to not only lay the foundations for support in the future, but also to learn what issues are important to them and the people they represent.

### **4. Meet the Press**

Equally important to meeting local leaders is meeting the local press. Establishing a good rapport with local editors, producers and reporters will help the campaign garner earned media further down the road. Speak with your local newspapers to find out who is on the editorial board, and who covers local politics. Check with talk radio stations to arrange meetings with talk radio hosts, and befriend the editors of the local community weeklies.

### **5. Scour the News**

It is of utmost importance that candidates and potential candidates stay up on current events, both in the world at large and in the local community. Set aside some time each day to read through the local newspapers, magazines, and watch local news reports. If the district is large, have volunteers in various parts of the district clip news items of interest and send them to the candidate for review.

### **6. Practice Speaking**

The months before the campaign gets started are a great time for the candidate to polish his or her public speaking skills. Work with a speech coach, family member or friend to perfect your deliver of prepared and impromptu speeches. Consider videotaping yourself for added analysis and practice.

It's never too early to start preparing your run for office. If you haven't decided whether to run or not, taking these steps will help you make your decision. If you've committed to the campaign, getting a head start will make it easier to implement your campaign strategy and build momentum. In either case, start preparing for your political campaign **today**.

### **III. Anatomy of a Campaign Plan**

Your campaign plan is the foundation of your entire campaign. Money, enthusiasm, manpower, and good press are all important to your success, but without a coherent strategy pulling them all together and making them work for you in a coherent manner, your chances are no better than hit or miss. Every campaign – **no matter how small or large** – needs a written campaign plan to keep it on track.

Here are just a few reasons why your campaign needs solid plan from the outset:

- 1. Provides organization** – a detailed campaign plan creates organization and order in the chaotic world of political campaigns.
- 2. Defines responsibilities** – a campaign plan determines who does what, and adds accountability to your all of your efforts.
- 3. Sets deadlines** – a good campaign plan tells you when you need to do something, and when you need the money to pay for it. Deadlines help motivate your team to perform.
- 4. Provides a credible fundraising and PR tool** – when an investor purchases a business, he or she wants to see the financials that prove the company can be a success. Often, it's no different for major political contributors, activists and party leaders. Your campaign plan shows why you need money and/or support, and lets them know you are serious about winning the election.
- 5. Measures progress** – a detailed campaign plan lets you measure your political and fundraising progress, thus allowing you to make needed adjustments before it is too late.

#### **The Plan Components**

Your campaign plan should detail the strategy and tactics it will take to win. The plan should include detailed information tailored to your individual campaign's abilities and needs. The basic components of a thorough campaign plan include:

##### **1. Political Environment Evaluation and Targeting**

This section analyzes your district based on the information you provide us, including a demographic profile and media analysis. This section also includes detailed targeting for your race, analyzing prior voter history and voter registration statistics to pinpoint the number of votes you will need to win as well as targeting which precincts those votes will come from. Finally, this section provides an analysis of the candidates' strengths and weaknesses.

## **2. Campaign Strategy**

The first section of the plan laid the groundwork for the campaign: the environment it was taking place in and the number of votes it will take to win. If the campaign were reduced to a math problem, the first section would be the question: How do we receive this many votes in this political environment? The second section is the answer. The campaign strategy section details the methods the campaign will use to reach the vote goal it has set for itself.

The campaign strategy section contains several subsections, including:

- The strategic objectives for the campaign.
- Defining the campaign message and theme
- Defining the optimal campaign positioning as compared to your opponent
- Voter contact strategies and direct tactics the campaign will use to communicate its message (these strategies are then described in detail in the following sections).

## **3. Grassroots Programs**

This section specifies the various grassroots programs that the campaign should carry out to succeed in this particular race, which may include: door to door, yard sign program, telephone banks, tours, coffees, coalition development, absentee ballot program, voter registration program, get out the vote programs, etc.

## **4. Communications Strategy**

This section details the campaigns effort to generate earned media (press coverage) as well as explaining which paid media strategies the campaign should employ. Some of these paid media strategies may include: radio, television, newspaper ads, direct mail, billboards, etc.

## **5. Organization and Management Structure**

This fifth section details the personnel that will be required to successfully implement the campaign plan, including paid staff and volunteers, and details methods for gaining needed volunteers.

## **6. Research and Polling**

This section lists any polling activities or research (opposition or other wise) that should be completed along with specifying when this work should be done.

## **7. Fundraising Plan**

This section begins by looking at the rest of the campaign plan to determine a rough estimate of how much money it will take to complete all the tasks listed. This is the fundraising goal. The fundraising plan section then details the precise methods the

campaign must take to reach this goal, including direct mail, events direct solicitation, major donor programs, PAC activity, etc.

## **8. Timeline**

The ninth and final section of the campaign plan, the timeline, presents a complete overview of the campaign, listing all activities that need to be done and when they need to be completed in a calendar format for easy reference.

## **IV. Political Start-up Capital – Finding the Money You Need to Start Your Campaign**

If you're running or thinking of running for office, there are bound to be lots of questions running through your head. One question, though, is probably at the forefront. First time candidates and political pros alike start each election cycle with the same query: where will I find the money I need to win this election?

Fundraising for seed money for your campaign can be a difficult process. Often, first time candidates face a particularly problematic catch-22: without a war chest, it is difficult to be taken as a serious contender, yet without being seen as a serious contender, it is hard to build a sizeable war chest. It is possible, however, to raise the money you need to start your campaign off with a bang. Here are five of the best places to find start-up capital for your political campaign:

### **1. Personal Savings**

If you don't plan to contribute anything to your own campaign, how can you expect anyone else to? Many potential contributors will scoff at financing a first-time candidate who won't even donate to his or her own campaign. Of course, you needn't go broke contributing to your campaign, and different candidates have different size bank accounts – but you simply must give something before you can expect others to do the same.

### **2. Friends and Family**

Starting a political campaign is a lot like starting a business. And much like a new business owner seeking start-up funds, a new candidate should first tap those who he or she knows best. Approach family, friends, and business contacts – your entire network. Those who know you are more likely to support your candidacy financially than those who don't know you.

### **3. Past Donors**

If you've run for office before, be sure to contact all of the people who gave to your last campaign, whether you won or lost. They have already invested in you and your political career, and they want you to do well, so they are very likely to give to your campaign again.

If you've never run for office before, try to get the names and contact information for donors to other past candidates in your area who were similar in ideology to you. For example, if you are a conservative Republican and the local mayor is a conservative Republican as well, see if he'll let you borrow his donor list for a one-time mailing. People who are willing to open their pocketbooks for candidates similar to you are likely to open them for you as well.

#### **4. Your Opponent's Enemies**

If you are challenging an incumbent or have a well-known opponent, chances are he or she has made some people mad in the past. These people, your opponent's political "enemies," are likely to give to your campaign early, because they want to see you do well and beat the candidate they simply don't like. Call on them personally and offer them an alternative to "the other guy."

#### **5. Your Friends' Friends**

People are more likely to give money to a cause when someone they know and trust asks for it personally. Gather your family, best friends and closest contacts together and ask them to solicit donations for your campaign from within their own circles. Give them the materials they will need to do this, including what to say, how to collect the money, and a goal for what they should raise.

For example, your brother could work his buddies at the bar by telling them his big brother is running for state rep, and would they be willing to chip in \$25 each? Your uncle could let his contacts at work know that you are running, and ask the boss to hold a fundraiser for you. Your best friend who is a member of the local chamber of commerce and friends with most of the members could mail each one a letter asking for a \$100 donation. The list goes on and on...

Remember, in order to start strong you'll need to start early. Use these five tactics to start raising the money you need to win early, and you'll be off to a great start.

## **V. Campaign Job Descriptions**

All campaigns are different. Therefore, the amount of paid staff and volunteers necessary for success, the jobs that they will fill, and the amount of time they need to do their jobs right will differ in each campaign.

Below are some common jobs descriptions that must be filled on all campaigns. Some campaigns may be small enough that one person can serve in two of the positions, but each job must be done and done right. Whether the job is filled by a paid staff member or a volunteer, each of the following job descriptions is integral to the success of your campaign:

### **1. Campaign Manager**

After the candidate, the campaign manager is the most important member of the campaign team. The candidate should never, ever function as the campaign manager, no matter how small the campaign is. The candidate needs to be free to meet the voters and donors and be out on the campaign trail.

The campaign manager is responsible for all aspects of the campaign. The person you choose for this job should have a basic understanding of election strategy, be comfortable delegating, have good organizational skills and be able to work well with the candidate. The campaign manager works in conjunction with the candidate and the entire team to develop the campaign strategy and coordinate all aspects of the organization, from fundraising to paid media to voter contact activities.

### **2. Volunteer Coordinator**

Above all, the person you choose to be the volunteer coordinator must be a people person. Working with volunteers is stressful, and requires diplomacy and patience. The volunteer coordinator is responsible for recruiting, scheduling, and organizing the volunteer team. Because volunteers are not paid and are often unskilled, the coordinator needs to be able to smooth over egos and trouble spots and effectively teach the volunteers new skills. The volunteer coordinator should be comfortable delegating duties to precinct and ward captains, especially in larger election districts.

### **3. Fundraising Director**

The fundraising director is responsible for coordinating all of the fundraising tools at the campaign's disposal to reach the fundraising goal that the team has set on the timetable on which they have set it. The fundraising director guides the campaign's major donor and direct mail fundraising programs, and oversees fundraising events. In smaller campaigns that cannot afford an accountant or election lawyer, the fundraising director must have a basic knowledge of campaign finance regulations.

#### **4. Finance Chairman**

Though they are often confused, the finance chairman fills an entirely different role than the fundraising director. The finance chairman, along with the finance committee, is responsible for bringing in major donor contributions. Generally, the finance chairman contributes a certain amount to the campaign, and pledges to raise a significant amount from other donors. While the finance chairman may be involved in fundraising planning sessions, he or she does not run the fundraising organization -- that job is left to the fundraising director, who takes care of the organization and day-to-day details of the fundraising program.

#### **5. Grassroots Coordinator / Field Director**

The grassroots coordinator (often called the field director) oversees all of the grassroots activities of the campaign, including coalitions, get out the vote, absentee voter drives, voter registration efforts, and other grassroots activities. In larger campaigns, these activities are often each assigned a staff member of their own, but in local campaigns it is generally sufficient to have one grassroots coordinator who oversees the whole operation, with volunteers filling in as needed. The grassroots coordinator must have superb organizational skills, be knowledgeable about campaign strategy, and be able to take on a lot of responsibility, especially as Election Day draws near.

### **OTHER CAMPAIGN POSITIONS**

In addition to these five essential jobs, many campaigns find the following positions useful and integral to their success:

#### **The Campaign Committee**

The Campaign Committee should consist of “pillars of the community” – people who give credibility to the campaign. A Campaign Chairman or Chairwoman may be selected for this Committee, if a person of suitable stature in the local community can be found. The Campaign Committee should be kept abreast of campaign developments, but it is not responsible for the operation of the campaign. These are honorary positions.

#### **Legal Counsel**

A campaign legal counsel may be appointed to oversee compliance with campaign finance regulations and election law. The legal counsel need not be “on staff” (full time), but may be on retainer and available should his or her advice be needed. Having a campaign lawyer on board is highly recommended.

#### **Scheduler**

It is imperative that only one person be in charge of scheduling the candidate’s time. The campaign scheduler is responsible for replying to invitations the candidate receives,

keeping track of what he or she has committed to, drawing up daily and weekly calendars for the candidate to follow, and dealing with public in regards to campaign appearances. The scheduler coordinates drivers and surrogates for the candidate, and is in constant contact with the candidate and campaign manager.

**Press Secretary**

Responsible for making the candidate known to the electorate through earned media. This person speaks with the media on behalf of the campaign and candidate. This important team member must have sound political and news judgment.

## **VI. Do it! Steps to Get Your Campaign Started.**

Below is a list of steps and planning items to help you get your campaign off the ground. While not all steps will apply to every campaign, this list should help you get started.

Successful campaigns are based on sound planning. Before you announce your candidacy, you should have your campaign and fundraising plans written and be familiar with the tactics you will use to win your campaign.

### **LEGAL**

- Find out the exact procedures that need to be followed to declare your candidacy, including nominating petitions, appointment of campaign treasurer, financial disclosure forms, filing fees, etc.
- Find out the dates and deadlines for the primary and general elections, filing of nominating petitions, campaign finance reports, voter registration, and absentee voter registration.
- Find out the laws that govern your campaign. This includes fundraising limits and procedures, disclaimers for printed and broadcast advertisements, voting procedures, political sign regulations, Election Day procedures, etc.
- Speak with a competent election lawyer for advice on your campaign.

### **FUNDRAISING**

- Pick a Campaign Treasurer.
- Establish a campaign bank account.
- Open a campaign P.O. Box.
- Develop campaign procedures for accepting campaign contributions and making campaign expenditures. Who may authorize spending money? What will we do with contributions when they come in?
- Assemble a list of key donors. Sit down with the candidate to identify the candidate's friends, family, social and business associates who may contribute to the campaign. Start a list.
- Approach friendly elected officials, previous campaigns, and party leaders to obtain lists of previous donors. (Note: It is illegal to use FEC filings to build your list of donors or to solicit names you garner from FEC files.)
- Establish a finance committee of key people who have large fundraising networks, are able to contribute to the campaign, and can get their friends and associates to do the same.
- Determine national, state, and local PACS who may contribute to your campaign. Create a PAC kit to distribute telling PACs why they should contribute.
- Start drawing up a campaign budget based on your campaign plan: How much money do we need to raise?

## **POLITICAL RESEARCH**

- Conduct voter research and district analysis.
- Obtain necessary maps: district maps with precinct lines, detailed precinct maps, street and road maps of all cities and towns in the district.
- Find out where you can obtain voter lists and in what form these lists are available.
- Analyze your district's voter history: current voter registration, registration by party, past election results by precinct, etc. Do electoral targeting.
- Identify key voter groups and coalitions throughout the district. Identify special groups, organizations, and key movers and shakers in each area of the district.
- Assemble detailed background information on all candidates, including your own.
- Determine what other races will share the ballot with you.
- Determine what political issues may affect your race: economic conditions, national politics, etc.
- Analyze the media outlets in your district: start a list with contact information for all broadcast stations, newspapers, weekly local papers, etc. in your district.
- Approach recent campaigns for any polling and survey information they may share with you.
- Begin developing an overall campaign plan.

## **ORGANIZATION**

- Assemble your core group of supporters/volunteers to help you start the campaign.
- Decide when you will open your campaign office based on the plan and your finances.
- Figure out who you want to recruit to be a part of your campaign. Consider local Republican activists, previous campaign workers, opinion leaders, party officials, etc.
- Organize a campaign steering committee.
- Determine the structure you want your campaign team to take. Begin to assemble management team.
- Obtain community calendars, church calendars, organization and club event lists, community group information, carnival and sporting event calendars. What events are taking place and when are they happening? Who is running the event?
- Before opening office, try and have office supplies donated whenever possible. Figure out if you need property insurance and how to turn utilities on.

## **COMMUNICATIONS**

- Assemble candidate photos.
- Develop a media list with key contacts.
- Begin clipping stories of local political interest and keeping a file.

*The Complete Guide to Getting Your Campaign off the Ground*

- Start crafting a preliminary stump speech for the candidate. Polish speaking skills.
- Start an issues file with issues papers and research.
- Begin to develop a campaign theme and message.
- Create a media kit to share with reporters and interested contacts.