

[Insert Campaign Name]

[It is critical that from the very beginning the [Insert Campaign] team ***plans the work and works the plan***. The purpose of this template is to lie out the elements of the campaign and the questions that must be discussed and answered in order to create an effective and comprehensive campaign plan. This document will become the playbook for the campaign to follow - and continually update and modify as needed – to ensure we are following a strategic path to victory.]

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Executive Summary

Goals and Objectives

[What are the goals and objectives of the campaign?

Goals are the wins – it is things such as securing a party endorsement, win Primary, win General Election, etc. Objectives are tactics and methods to get to our wins – it is the things we need to be successful such as building a strong campaign team, meeting fundraising goals, developing a strong message, etc.]

Lay of the land summary

[Brief overview of the political landscape. Should be specific to phases of the campaign – Endorsement, Primary, General Election and touch on the opportunities, challenges, strategic assumptions and dynamics that will impact the efforts.]

Political Landscape

[This section provides a description of how the state works politically and electorally. It is divided into Pre-Endorsement and Post-Endorsement sections.]

Pre-Endorsement/Primary

Delegates (consistent delegates and how to expand)

Primary Voters (consistent and how to expand)

Challengers

Issues

Endorsements (Labor, organizations, Elected officials, Party Officers, constituencies, other high-profile)

Political Problems

Post-Endorsement/Primary

Population

Geographic Breakdown

The Ballot

Political Problems

Targeting Strategy

[This section describes the targeting strategy the campaign will use to reach the win number. It is divided into the following sections based on phases of the campaign:

Caucus/Convention/Party Endorsement (if applicable), Primary Election (if applicable), and General Election.]

Caucus/Convention/Party Endorsements

Similar Past Caucuses and Conventions

[Use this subsection to review results of any relevant recent similar past caucuses/conventions/party endorsements.]

Caucus Turnout Projections (if applicable)

[This subsection should summarize previous turn out projections and answer the question: What is the expected turnout for the Precinct Caucuses?

Primary Election

Similar Past Primary Elections

[Use this subsection to review the electoral results of any relevant recent similar past Primary Elections.]

Primary Turnout Projections

[This subsection should summarize turnout projections and address these questions:

1. What is the eligible vote in the Primary?
2. What is the expected vote in the Primary?
 - a. Break down by precinct

Primary Win Number (Vote Goal)

[This subsection should provide the win number or vote goal. This is the number of votes the campaign must get to win on primary election day. This should also provide the election math about how the campaign gets to the win number.]

1. What is the win number (vote goal)?
2. What is the vote scenario or vote goal share?
 - a. Break down by precinct

General Election

Similar Past General Elections

[Use this subsection to review the electoral results of any relevant recent similar past General Elections.]

General Turnout Projections

[This subsection should summarize turnout projections and address these questions:

1. What is the eligible vote in the General?

2. What is the expected vote in the General?
 - a. Break down by precinct

General Win Number (Vote Goal)

[This subsection should provide the win number or vote goal. This is the number of votes the campaign must get to win on General election day. This should also provide the election math about how the campaign gets to the win number.]

1. What is the win number (vote goal)?
2. What is the vote scenario or vote goal share?
 - a. Break down by precinct

Data Tracking and Management

[This section should describe in complete detail the data operation that the campaign will use.]

1. Is the campaign going to use the VAN for all data tracking during all phases of the campaign? What will need to be tracked and what is the plan for that?
2. Who responsible for different components?
3. What training and support is needed for data managers, other staff and volunteers?

Voter File Analysis

[This section provides an analysis of data currently found on the voter file that will be used by the campaign. This analysis should include reports on the numbers of voters found on the file.]

Definition of Criteria

What criteria should be used on the voter file to define each of the following universes of voters?

1. Democratic voters
2. Republican voters
3. Persuadable voters
4. Frequent voters
5. Infrequent voters

Research

[This sections describes all the major research the campaign will conduct and outlines the timelines for that research. What public information exists about the candidate? What is the plan for collecting, analyzing and using this information?]

Self Research

1. What types of policy and political information should be discussed? Who will prepare

the research?

Opponent Research

1. Which opponents will be targeted for opponent research?
2. What types of policy and political information will be included? Who will prepare the information?

The Message

[This section provides the research-driven thematic message frame, message box, and other guidance.]

1. What are the 2-4 clear, simple, short key thematic message frames that **connect to the values** of targeted voters?
2. Why would [insert candidate] be the best for the office sought?
3. Why is [insert candidate] the candidate who is best qualified to understand the concerns of voters?
4. What is [insert candidate] already known for that we should build upon?
5. How is [insert candidate] different than her opponents?
6. What obstacles in [insert candidate]'s record or experience will she/he need to overcome? Should [insert candidate] proactively address these in her/his message?
7. What issues are the most important to voters? By region?
8. What issues are most important to those voters whose support [insert candidate] needs to win – those whose support [insert candidate] does not already have?
9. What issues does [insert candidate] care about most and will want to champion once elected?
10. On what issues is [insert candidate] a credible messenger – which issues is [insert candidate] an authority on?
11. What is the [insert candidate] narrative/story? How will [insert candidate] present herself/himself as a candidate and create contrast with her opponents (DEM, GOP, IP, GREEN, etc.)
12. What is the context of the message?
13. What is the contrast to the message?
14. What is the content of the message? Issues?
15. How does the message frame speak directly to the “me and my own” of the targeted voters?
16. Does the message change Pre-Endorsement – Primary – General? How can it change and evolve productively? Message should grow – not be static.
17. How does [insert candidate]'s message simultaneously carve out niches while supporting overarching themes that make her/him viable to everyone?
18. What are the challengers' niche issues?

Message Box

What we say about us.	What we say about them.
What they say about us.	What they say about them.

Communications

[This section summarizes the plan for the website, paid, earned and new media.]

Website – www.xyz.com

How is the content of the website managed?

How is data collected online tracked and managed?

What is the goal of the website?

What are the components of the website?

Email Schedule

1. What is the Email schedule?

Earned Media

1. What does the earned media operation look like?
2. How is the letters to the editor operation managed and tracked?
3. Press releases, photo releases, news conferences, radio actualities, op-eds, etc.
4. Surrogates/Validators?

New Media

1. What does the new media strategy and operation look like?
2. Blogging – what’s the strategy and how do we track and manage? Networking with bloggers? Working with citizen journalists and video bloggers?
3. Social networking sites – Facebook, Twitter, etc. – what is the strategy and how do we track the data and manage the content?
4. Wikipedia/[if incumbent] City, State or other public site – what changes should be made, what limits can be pushed to promote candidate and message?

Direct Voter Contact

[This section summarizes the plan for volunteer-driven and paid direct voter contact. The key being how many votes do we need to win and which votes are they? How will we reach these voters?]

Caucus and Convention

1. What is the universe criteria and size for ID and persuasion?
2. What is the schedule/sequence of the contacts?
3. What is the ID and persuasion phone program?

Primary and General Election

1. What is the universe criteria and size for ID and persuasion?
2. How do we work with the Party/Coordinated Campaign(provided there is one)? Local party units?
3. What is the persuasion phone program? Paid? Volunteer?
4. What is the door knocking program?
5. What is the base and persuasion direct mail program?

Political

[The political plan will explain how the campaign will build coalitions, interact with key constituencies and individuals, and work with organizations to build support and maximize the candidate's time.]

1. How do we interact with and maintain supporters?
 - a. How do we respond to all supporter inquiries?
 - b. What is our system for maintaining and strengthening relationships with all supporters?
2. [If incumbent] What is our specific plan for interacting with and maintaining supporters who are unhappy with the City/State?
3. Who are [insert candidate]'s core constituencies? What system will we use to establish, develop, and maintain core constituency groups? What is the role for validators and surrogates?

Scheduling

[This section is to provide an overview of the scheduling of events and time management.]

The most valuable asset on any campaign is the candidate. One can always raise more money, recruit more volunteers or send more mail, however NO ONE can create more time. It is

imperative that the candidate's time be spent on the most productive activities – persuading voters and raising money.

1. What is the scheduling protocol for all events?
2. Who decides what events are critical and which are not?
3. [If incumbent] What is the relationship between the campaign and the official office?
Who maintains the calendar?

Candidate Schedule Guidelines

[This section is to outline the guiding principals of the candidates time and scheduling.]

1. [Insert Candidate] should spend at least X hours a week on fundraising call-time.
2. [Insert Candidate] should spend approximately X hours a week on political/field call-time.
3. Events will be limited to the following categories: Party, Organizing/Community, Political and Fundraising events.
 - a. Party events are events sponsored by a local, regional or state party committee or group.
 - b. Organizing and Community Events- events that are driven and lead by community members and/or volunteer appreciation events for you volunteer base. Examples- farmers markets, local fairs and festivals, canvass kick offs, community issue forums.
 - c. Political events are events that serve a purpose outside of the Party, these meetings/events include Union/Labor meetings, Progressive organizations, etc.
 - d. Fundraising events are fundraisers or meetings with high profile donors.

Fundraising

[The finance plan will explain in detail how the campaign will raise enough money to pay for all the campaign operations. Each piece of this campaign plan will have a cost; the finance plan will determine how to raise enough money to meet those costs.]

How much money does the campaign need to raise (this will correspond to the budget – found below)?

The campaign's goal is to raise X.

The campaign has the following date specific goals:

How does the campaign plan to raise the money? What fundraising systems will the campaign use to meet its goal?

The campaign currently uses or is planning to use:

- Call time (what does this program look like, how many hours/week, how is it managed, etc.)
- Events

- House Parties
- Mail
- Email
- Web-based

Who will have access to/authority over banking information? Check signing? Debit/credit cards?

What are the goals for each program (call time, events, house parties, mail, email, web-based, supporter commitments, etc.)?

How do we systematically evaluate each program – cost/benefit?

What should the donor maintenance program include (donor dinners, regular check in calls, etc.)?

Budget

[This portion should outline key expenses for each phase of the campaign.]