

Assessment Worksheet

Let's start with who is on your leadership team. It's important to build out your core campaign team early on in your race. That way you can build leadership development into your campaign from the very beginning and you will have a team to support you in running for office from the start. This is important because the candidate's time needs to be spent wisely and there is lots to get done when you are starting-up your campaign.

Below list the names of people that are currently in or are prospects for these positions

Kitchen Cabinet: This is your close team of advisors. They should be people you trust, can add capacity to your campaign and can provide strategic support and guidance.

1. _____(circle one: currently on/need to ask)
2. _____(circle one: currently on/need to ask)
3. _____(circle one: currently on/need to ask)
4. _____(circle one: currently on/need to ask)
5. _____(circle one: currently on/need to ask)
6. _____(circle one: currently on/need to ask)

Campaign Manager: This person will support the candidate in executing the campaign plan and overseeing and driving the day to day work.

1. _____(circle one: currently on/need to ask)

Lead volunteers or staff: They drive different parts of the campaign plan. Typically starting with at least one lead for these three areas: communications, fundraising and organizing.

1. Organizing _____(circle one: currently on/need to ask)
2. Fundraising _____(circle one: currently on/need to ask)
3. Communications _____(circle one: currently on/need to ask)

OTHERS:

1. _____(circle one: currently on/need to ask)
2. _____(circle one: currently on/need to ask)
3. _____(circle one: currently on/need to ask)

Now let's look at organizing people! Think of your life list, how many people would you be able to organize into a canvass if your campaign were to launch a month from now. If they have relationships that might be useful to you—write the # of people you think they'd be able to organize into your campaign. Underline all of the people who live in the jurisdiction you would be running in.

1. _____

14. _____

2. _____

15. _____

3. _____

16. _____

4. _____

17. _____

5. _____

18. _____

6. _____

19. _____

7. _____

20. _____

8. _____

21. _____

9. _____

22. _____

10. _____

23. _____

11. _____

24. _____

12. _____

25. _____

13. _____

26. _____

Let's move on to organized money. Raising money is critical to your campaign; the money you raise will allow you to successfully build a strong campaign that can achieve all of your goals. So, what would be your starting place? Think of friends, family, coworkers, leaders and neighbors who you could ask to donate monthly to your campaign. Write down the monthly donation they could give and add it all up at the bottom- then multiply by 7 months. That is your starting place. You may also have folks that could give larger, one time donations. Write those down too and add them up to the 7 month total.

Current money raised: \$ _____

Monthly Donations List- *People you can ask now to give monthly, along with amount you will ask for:*

Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____

Total Amount Listed: _____ *7months= _____

Larger One Time Asks Donations List- *People you can ask now to give a larger one-time contribution, along with amount you will ask for:*

Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____
Name: _____	\$: _____	Name: _____	\$: _____

Total Amount Listed: _____ + Monthly Donations _____ = _____ (starting funds)

Next, let's think of institutions you have relationships with. Are you a member of a union? Are you currently a local PTA member? Do you have relationships with the neighborhood association or chamber of commerce? Could these relationships yield organized money, organized people or both? Write the organization(s) and the people and money they could give to your campaign.

What is the message or story your community has about you? Do they know who you are and recognize you as a community leader? Is there an issue fight or electoral campaign you've been in with your neighbors that they have seen you lead on? What would your neighbors say about you in that story?

Finally, are you in relationship with other elected officials or community leaders in this city or state? Do they support you in your campaign? Are they willing to be spokespeople on your behalf? Do they bring in other resources- like people, money, campaign office space and office materials or even important connections or mentorship?