



## **CHAPTER IX:**

# *Staff and Volunteers: Creating a Winning Team*

*“Never doubt that a small, group of thoughtful, committed citizens can change the world.  
Indeed, it is the only thing that ever has.”*

*Margaret Mead*

No candidate can succeed without the help of many people at every stage of the campaign. From the kitchen cabinet that helps write your campaign plan, to the donors who sustain your effort, to the citizens who cast their votes on Election Day, campaigns are always won by a team – and no team is complete without a full complement of volunteers and a small but carefully selected staff.

At the state and local levels, it is not uncommon for candidates to hire only a campaign manager and to do so just a few months before Election Day. While you will need to assess and determine your own needs for paid staff, you should understand primary roles and responsibilities of the standard campaign staff positions before you write your plan and budget, or make any hires. It is likely you will need your staff to wear multiple hats, so understanding the skills they will need to succeed is key to selecting staff wisely.

This chapter will outline standard staff roles and responsibilities within the context of a multi-person office and walk through the ways volunteers can be effectively cultivated, engaged and best utilized within your campaign.

## **I. STAFF**

Unless you’re seeking statewide or federal office, it is likely that you won’t employ a full complement of staff – nor will you need one. Outlined below are the primary positions usually hired within big-budget campaigns. Remember that even if your budget only allows for one hire, pieces of all of these jobs will have to be covered by that individual.

## **A. CAMPAIGN MANAGER**

This is the person responsible for the big picture; his or her eyes must remain on the prize while overseeing the campaign's many moving parts, including field, fundraising and cash flow, media and message, and overall operations. You will work closely together, so it is imperative you fill this position with someone you trust and can work well with. The manager should also be someone who has strategic political experience, can command the respect of the campaign leadership, staff, volunteers, the press and wider community, and who can work well under pressure. On a day-to-day basis, the manager will:

- ◆ Design and oversee overall electoral strategy, including targeting, message, polling, earned media, paid media, fundraising and budgeting
- ◆ Prepare campaign plan and budget
- ◆ Hire and manage staff
- ◆ Hire and manage consultants
- ◆ Manage cash flow, pay bills and prepare and file financial reports
- ◆ Liaison with the state party, elected officials and outside organizations
- ◆ Speak to press on the record

## **B. FUNDRAISER**

Your fundraiser must wear many hats. He or she should be an innovative thinker with a constant focus on creative ways to fundraise; an implementer who can put the fundamentals of your fundraising plan into action quickly and efficiently; an administrator who handles the tracking of donors and financial gifts with careful attention to detail; a ringmaster who can simultaneously manage individual donor, Internet, phone solicitation, direct mail and event-based fundraising programs; a diplomat who can make every donor feel appreciated; a cheerleader who can successfully motivate your supporters to raise money, host house parties and generate attendance at fundraising events; and a coach who can keep you motivated to do daily call time and stay on track to meet your goals. On a day-to-day basis, the fundraiser must:

- ◆ Write and implement a comprehensive fundraising plan
- ◆ Prepare candidate call sheets and staff candidate during call time

- ◆ Staff candidate at high-dollar fundraising meetings
- ◆ Solicit contributions
- ◆ Organize and manage phone solicitation program
- ◆ Plan and implement fundraising events
- ◆ Write direct mail appeals
- ◆ Plan and manage house party program
- ◆ Issue fundraising appeals via email
- ◆ Secure PAC contributions
- ◆ Build donor database and track all donor activity
- ◆ Produce weekly fundraising reports
- ◆ Assist with preparation of financial reports
- ◆ Implement fundraising systems
- ◆ Thank donors
- ◆ Understand and communicate knowledge on state election laws
- ◆ Work with campaign treasurer to ensure legal reporting and disclosure

### **C. PRESS SECRETARY**

Your press secretary is your front line to the world. First and foremost, he or she should have good political instincts. Having a person in this position who understands what makes a good story or what the proper response is to the issue or crisis of the day will save your campaign many a self-inflicted wound. He or she should also be a competent and quick writer and personable enough to build friendly relationships with reporters and spend a good part of the day on the phone. The press secretary will:

- ◆ Speak to reporters on the record
- ◆ Build and maintain relationships with key reporters
- ◆ Prepare candidate for and staff candidate during interviews and editorial board meetings
- ◆ Write media advisories, press releases, talking points, speeches and letters to the editor
- ◆ Conduct rapid response
- ◆ Plan and execute press conferences and media events
- ◆ Recruit and manage surrogates
- ◆ Build and maintain press database
- ◆ Create and distribute media kits
- ◆ Build and maintain candidate clip file

- ◆ Manage volunteer letter to the editor campaign
- ◆ Establish and provide content for website

#### **D. FIELD MANAGER**

The field manager is the backbone of your electoral strategy – someone who believes in the importance of engaging voters on an individual level, understands the value of recruiting and developing activist leaders, lives by the rules of effective voter targeting and can implement a plan to reach your target audience multiple times and in multiple ways before Election Day. The field manager becomes a more necessary hire in the final three months of the campaign. On a day-to-day basis, he or she will:

- ◆ Conduct and hone targeting
- ◆ Design candidate and volunteer walk plans
- ◆ Prepare walk packets
- ◆ Prepare direct mail lists and GOTV phone lists
- ◆ Develop literature and other materials used for voter contact
- ◆ Plan and execute literature drops
- ◆ Plan and execute visibility
- ◆ Plan and execute Election Day plan
- ◆ Send vote-by-mail, absentee ballot and sample ballot information
- ◆ Plan and implement voter contact phone banks
- ◆ Track voter contact
- ◆ Hire and manage paid or volunteer canvassers
- ◆ Recruit, manage and motivate field volunteers

#### **E. SCHEDULER/ASSISTANT**

The scheduler will essentially manage your life, and as such needs to be someone with whom you can work closely. They need to have the ability to balance a barrage of conflicting requests, deal diplomatically with your family as well as those wishing to get on your schedule, ensure that fundraising call time and door knocking maintain top priority and make all scheduling decisions with the end game in mind. Your scheduler will:

- ◆ Manage intake of all scheduling requests

- ◆ Prepare your daily schedule
- ◆ Compile all briefing information for you prior to each meeting or event, including your speech, talking points, point-to-point driving directions, on-site logistics and participant lists and bios
- ◆ Manage your personal rolodex
- ◆ Staff you as appropriate

## **E. RESEARCHER**

Over the course of the campaign, your researcher will utilize all available tools to assemble information on you, your opponent and the issues of relevance to your race. He or she will not deal regularly with the general public; resourcefulness will be his or her most important attribute. Day to day, the researcher will:

- ◆ Compile and maintain an opposition book on your opponent
- ◆ Monitor major sources of local and national news for key stories
- ◆ Monitor the daily schedule of your opponent(s)
- ◆ Monitor and tape all local television and talk radio programs
- ◆ Prepare issue briefings
- ◆ Fill out questionnaires

## **F. VOLUNTEER COORDINATOR**

While the volunteer coordinator won't be making strategic decisions, he or she will have one of the most important jobs on the campaign. Recruiting, training and managing volunteers takes a personable, patient and highly organized individual willing to work incredibly long hours over the entire course of the campaign. He or she has the ability to provide a meaningful experience for hundreds of people and turn volunteers into lifelong supporters of your political career. Each day, a volunteer coordinator will:

- ◆ Work with entire staff to determine overall volunteer needs
- ◆ Develop a plan for volunteer recruitment, training, utilization and retention
- ◆ Prepare volunteer recruitment materials
- ◆ Seek out and make use of opportunities to recruit
- ◆ Coordinate volunteer trainings

- ◆ Greet volunteers both day and night and provide them with clearly defined tasks
- ◆ Arrange for refreshments for all volunteers
- ◆ Ensure volunteers are routinely thanked and recognized for their work
- ◆ Assess and modify volunteer assignments as needed
- ◆ Create and maintain volunteer database

## II. VOLUNTEERS

Whether taking on select responsibilities outlined above for which you do not have paid staff or conducting more routine tasks such as canvassing, assisting with visibility, conducting literature drops, answering phones and stuffing envelopes, volunteers will be the heart and soul of your campaign. On a strategic level, they can make the difference between a winning effort and one that had great vision, message and strategy but not enough people to carry it through. On a global level, integrating volunteers into your campaign reinforces the grassroots, populist ethic that progressives bring to politics.

Recruiting volunteers and implementing a plan to utilize them effectively, show appreciation for their efforts, and keep them coming back should be a top priority for your staff. Managed correctly, a volunteer program can be an incredibly productive and rewarding one for the campaign, the volunteer and the community.

### A. PLANNING

An important first step in seeking and utilizing volunteers is mapping out a plan for how many you will need for your designated projects and how you will recruit, engage and retain them.

Begin by making a list of your volunteer or unmet staffing needs within all areas of your campaign operation. Listed below are those tasks you may want to incorporate, separated into areas of focus:

#### **FUNDRAISING**

- ◆ Host a house party
- ◆ Staff events
- ◆ Serve on an event host committee
- ◆ Make low-dollar donor calls
- ◆ Stuff and mail invitations and thank you notes
- ◆ Assemble donor packets

- ◆ Copy checks and donor cards and maintain files
- ◆ Assist with donor research and data entry

### **PRESS/RESEARCH**

- ◆ Copy and assemble media kits
- ◆ Attend press conferences and media events
- ◆ Tune in to and report back on assigned news programs daily
- ◆ Write letters to the editor
- ◆ Call in to talk radio
- ◆ Maintain news clip file
- ◆ Conduct issue research
- ◆ Take photographs at candidate appearances/events
- ◆ Write copy for the website and email list

### **FIELD**

- ◆ Canvass door-to-door
- ◆ Conduct literature drops
- ◆ Register voters
- ◆ Compile walk packets
- ◆ Conduct visibility at assigned locations
- ◆ Post campaign signs
- ◆ Make volunteer recruitment and GOTV calls
- ◆ Make signs
- ◆ Work the polls
- ◆ Flush neighborhoods
- ◆ Provide rides to the polls

### **GENERAL/OFFICE**

- ◆ Answer phones
- ◆ Run errands
- ◆ Drive candidate
- ◆ Lead volunteers

Once your staff has determined the tasks to assign volunteers, they will need to do the math to determine how many hours of help will be needed on each project and therefore how many volunteers the campaign will need to recruit overall.

For example, if your task is to engage volunteer callers in a 2-week telemarketing campaign, your formula would be as follows:

$$\frac{\textit{Total nights} \times \textit{hours per night} \times \textit{number of phones}}{\textit{Average hours per volunteer shift}} + 30\% = \textit{volunteers needed}$$

Assuming you're calling six nights a week for two weeks, or a total of twelve nights; each night you're calling from 5:30 – 9:30 pm, or four hours; you have four dedicated phone lines; your volunteers work an average two hours per shift, and an average seven in 10 -- or 70% -- of your volunteers show up, you would need 114 volunteers to fulfill your phonebanking capabilities.

$$\frac{12 \times 3 \times 4}{2} + 42 = 114$$

Because recruiting this many volunteers is a Herculean task, staff should ask each volunteer to work more than one shift and alert the fundraiser that the phones will likely not fill to capacity. Give him or her a reasonable assessment of the volunteers you can recruit, since phone banking income will depend on it.

By performing a similar equation for each of your programs, your staff can determine your total volunteer needs and plan recruitment efforts accordingly. The plan should map out the time during the campaign when each program will take place and it should rank volunteer projects in order, so those of the highest priority get volunteer assistance first.

*When doing the math on your volunteer needs, assume an 70% participation rate among those who sign up.*

## **B. RECRUITMENT**

Now comes the hard part: finding the volunteers. Your staff should begin by creating a diverse list of all of the groups that can be helpful to your effort, starting with your inner circle of friends, family members, past and current campaign supporters, and organizations and clubs to which you belong. Next, they will want to engage political and progressive organizations that are aligned with you on the issues, as their members are strongly inclined toward political activism, and constituency organizations that will help engage a diverse team of people into your campaign. Third, groups with which you may not have an existing connection but that are ready-made sources for potential volunteers should be added, such as student groups and neighborhood associations. Your initial list should include, but not be limited to, the following:

- ◆ Family members
- ◆ Friends and neighbors
- ◆ Past and current campaign supporters
- ◆ Fellow church, organization, club, or sorority/fraternity members
- ◆ State and local parties
- ◆ Women's organizations
- ◆ Environmental organizations
- ◆ Civil rights organizations
- ◆ Labor unions
- ◆ Teacher's groups
- ◆ Constituency groups
- ◆ Civic groups
- ◆ High school government classes
- ◆ University and community college political science departments, student governments, activist clubs and sororities/fraternities
- ◆ Senior citizens groups

One of the best ways to reach the members of these groups is via email; ask if the staff of the organizations listed above would send 'request for volunteers' notice on your behalf. While many groups must remain nonpartisan or refrain from assisting your campaign prior to an official endorsement, it is worth asking. If email is not possible, ask for alternative suggestions for ways you might engage their members.

Your staff should also post flyers on college campuses, at neighborhood community centers and on the bulletin boards of friendly organizations. Flyers should be brightly colored, prominently placed and include pull-off phone numbers so interested parties can get your number without tearing down your flyer.

A volunteer sign-up sheet should be passed around at every event you host, attend or speak at, and you should invite the participation of new volunteers in your remarks when and where appropriate. Don't just leave a sign-up sheet on a table – Make sure there is someone assigned to ask people on the spot to volunteer for a specific upcoming action.

The easiest way to get a volunteer? Ask. And just as with getting a vote, the most effective strategy is always direct and personal contact. Everyone who expresses an indication of support should be asked to contribute their time and skill to the campaign. Remember, politics is intimidating to most people, so an invitation counts. You will not succeed in getting the (free) help you need if you are not aggressive.

### **C. TRAINING**

Whether you'll have scores of volunteers assisting your effort on a daily basis or just a few regular faces until the final weeks, training your troops is important to making sure the partnership is a positive one for them as well as for the campaign. For full-scale projects such as phone banking and canvassing, volunteers should be asked to come to a training meeting led by a staffer in charge of that project; at the meeting, volunteers should be provided with clear instructions as well as a written cheat-sheet, and they should have the opportunity to get answers to their specific questions.

Even if your stream of volunteers is light, having your staff spend five minutes with your volunteers(s) upon their arrival to provide clear directions will eliminate second-guessing and save everyone tremendous headaches in the long run.

### **D. MANAGEMENT**

Once you get volunteers in the door, it is important that there be a system in place to effectively engage them in the campaign. As a

candidate for office with a limited budget, you can't afford to lose precious human resources. Investing time on the front end to ensure that volunteers are managed effectively will ensure that you don't.

Following are tips for running an effective volunteer program and ensuring that the partnership provides value to both the campaign and individual volunteers.

**Create a database and listserv.** Anyone who agrees to volunteer should be added to a database that includes name, contact information and skills and interests, provides an emergency contact and allows you to track their participation. You should also create an email list that makes issuing a call for volunteers for specific projects a snap and allows volunteers to communicate with one another.

**Establish a contact.** Make sure someone on your staff is responsible for greeting volunteers when they arrive and providing them with assignments. A friendly face and a sense of direction can make all the difference.

**Be prepared.** Set specific tasks aside as they arise so you've got work ready when volunteers arrive and make sure you've got the supplies, such as envelopes, stamps, etc. to allow for completion of the job. Don't let your volunteers sit around; be ready for them when they show up, and encourage them to work hard for the campaign while they are there.

**Post a calendar.** Use a large wall calendar to announce when specific projects will take place and allow volunteers to sign up. This helps reduce the work of your staff in making recruitment calls, and increases the social aspect of each assignment, allowing volunteers to choose shifts with friends. Know when volunteer opportunities are coming up and make sure staff and current volunteers calling to recruit have several opportunities available for those interested in taking part.

**Create accountability.** Track who works when and what projects they are working on so questions can be directed to the right volunteer(s). Ensure that projects are ultimately overseen by a staff member or trusted volunteer to whom others can go for clarification.

**Provide refreshments.** We are all more efficient when our needs are met. Ensure that you have water, coffee, sodas and snacks on hand; they not only increase productivity, but they make volunteers feel appreciated.



*"Volunteers are the backbone of any legislative campaign. If it weren't for volunteers from my community and from the local Democratic Party, I wouldn't be elected today."*

*- Washington State Representative John McCoy*

## **E. RETENTION**

Showing your volunteers respect and appreciation will increase productivity, ensure a continuous supply of human resources, and create loyal campaign supporters and voters. The following guidelines will help you create an atmosphere that keeps people coming back.

**Create a social atmosphere.** Many people will volunteer for the social opportunities it provides. If possible, provide conference table that facilitates conversation and schedule people to work at a time when they will not be doing so alone. Have a staff person interact with them regularly so they feel appreciated and are kept on task.

**Show respect.** If you're angry with or annoyed by a volunteer, never talk about it with or in front of the others. Creating an atmosphere of respect is critical for morale.

**Provide special benefits.** Simple things like inviting particularly engaged volunteers to attend fundraisers as a guest or recognizing individuals with posted recognition in the office reinforces your commitment to those people who are most committed to you.

**Host appreciation events.** Every once in a while, your staff should invite volunteers to gather for drinks or dinner; it increases the social factor of the work, which for many is a reward in itself.

**Allow for increased responsibility.** Ensure that your best volunteers don't get stuck stuffing envelopes every time they come in. If there are more challenging responsibilities that need attention, assigning them to your best people is a win-win.

**Express appreciation personally.** As the candidate, you should drop by volunteer nights regularly, even if just to say hello and thank everyone for their time. Thanking volunteers as a group in your remarks at all speeches and events is an added plus. Doing these small things is certain to reinforce the people-driven nature of your campaign and contribute to high morale and loyalty among your troops.