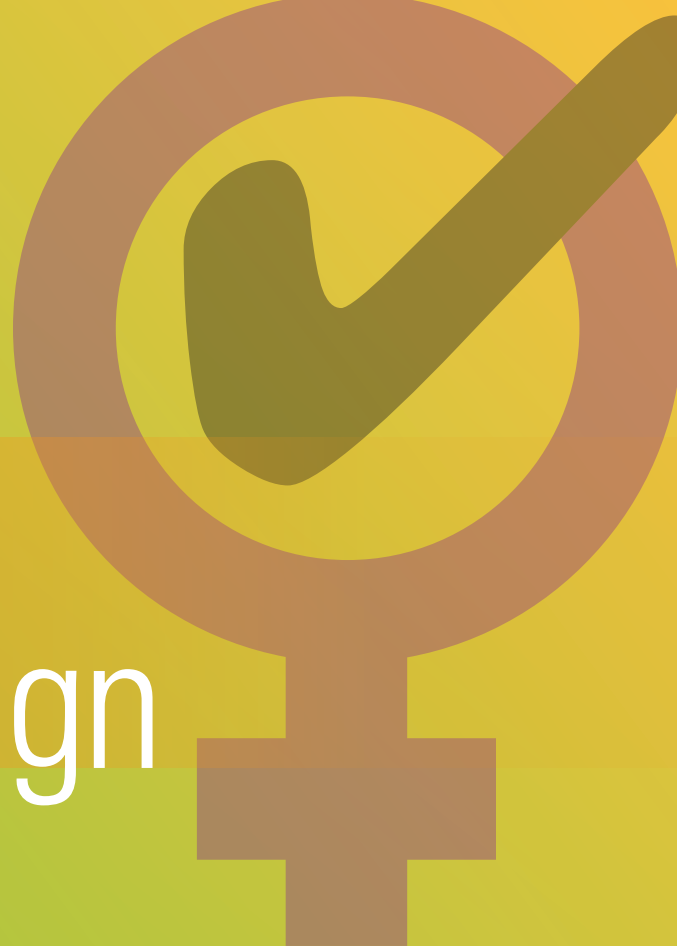


Planning Your Campaign



CAMPAIGN**SCHOOL**
for women

Introduction

Now that you have decided to run, or secured a nomination, it's time to start planning your campaign. There are many components to consider – this booklet includes practical considerations, tips, and tools to get started. A great campaign starts with a great plan!

It also starts with a great team. This booklet highlights the various roles and supports that can help you bring your campaign strategy to life, as well as key elements of the campaign trail – from canvassing, to fundraising, to communications and media engagement.

Some candidates find fundraising to be one of the most daunting aspects of the campaign, while for others it is canvassing and meeting as many voters as possible on the doorstep.

With a solid plan, you will be able to anticipate challenges, ensure you have enough time and resources, and assemble a team that matches the ambition of your campaign strategy.

This booklet includes several worksheets and planning tools to assist in mapping out your plan, estimating your budget, and putting together a solid message.

Throughout your campaign, take every opportunity to repeat your views on the issues and, when all else fails, repeat them again. Let your voters get to know you and what you stand for.



Start planning
1 year before election.

Confirm campaign team
6 months before election.

The earlier you decide to run for office, the better. When possible, six months to a year is a good lead time, and your campaign team should be in place six months before the election is called. However, you may not know when an election will be called, and planning your campaign in advance is beneficial.

Putting Your Team Together

Identifying the right people to fill key positions on your campaign team is critical. You will need people who are committed, dedicated, trustworthy, hard-working, and able to volunteer a great deal of time during the campaign.

There may be a campaign team already available in cases where a party reaches out and asks a candidate to run. In some campaigns, party workers from other provinces are brought in to assist local constituencies.

Approach individuals from a wide range of community groups and organizations to work on your team to ensure that you have broad and diverse representation within your constituency.

Broad support is crucial, and diversity in your team will enhance your support base and improve your understanding of the various perspectives on issues.

In some cases, workers are paid a stipend or salary for their time. Whether you can afford to pay your workers depends on your campaign finances.

It is important to remember that, while you are looking for commitment from your volunteers, individuals have other commitments regarding work, family, or other volunteering, and these commitments need to be respected.

Your Campaign Team: Positions and Responsibilities

An effective campaign team is crucial for a successful election campaign.

- The more people you have volunteering for your election campaign, the more voters you can reach and identify to vote for you, assuring someone will be available when needed.
- More volunteers will also ease the workload and pressure, both for you as the candidate and the rest of your campaign team.
- Depending on the size of your campaign and the level of government, the number of individuals filling these positions will vary.
- The composition of your campaign team will depend on what works for you in your electoral area and in your circumstances, as well as with your team members.
- Each party has a campaign team guidebook that details what each campaign team position involves.



Key positions on your campaign team

While the following functions are needed, multiple functions may be handled by the same person.

Official Agent

You must name an official agent when registering as a candidate at the municipal, provincial, and federal levels. This person is responsible for keeping track and submitting expenses and contributions to the Chief Electoral Officer.

Campaign Manager

Your Campaign Manager will oversee your campaign team and ensure that the campaign runs as smoothly as possible by directing the candidate's daily activities. Your campaign manager may also act as your channel to the party and the riding association.

Ideally, your campaign manager will be someone with political experience who you respect and get along with, who can give you both praise and criticism, is trustworthy, and has good organizational and people skills.

Communications Coordinator

Your Communications Coordinator will arrange appointments for media interviews and prepare news releases and article submissions for newspapers, radio, and television, in conjunction with the candidate, campaign manager, and researcher. They also design and schedule advertising, including through the campaign's website, and monitor and support the candidate's social media accounts.

Finance Coordinator/ Fundraiser

Working closely with your Official Agent, your Financial Coordinator is responsible for bookkeeping, must be familiar with the rules associated with campaign expenses and, depending on the size of your campaign, may conduct fundraising. They should be a thorough record keeper and, if possible, have connections, especially regarding potential funding sources.

It is often suggested that fundraising activities should be completed even before an election campaign is called.

Researcher/ Information Officer

Your Research/Information Officer will locate material on issues important to your constituency, your party, and your campaign, and monitor newspaper stories relevant to your campaign. They may also assist in writing background material for speeches, public forums and debates, news releases, and pamphlets. This person often works with your databases to identify the vote as well as supporters who want to volunteer or put a sign on their lawn.

Volunteer Coordinator

Your Volunteer Coordinator will recruit, manage, and look after your election campaign volunteers. They train and assign volunteers to tasks and often look after scheduling. In most cases, this person will also recruit drivers with vehicles who can volunteer on Election Day. The Volunteer Coordinator sometimes also acts as the Canvassing Coordinator.

Canvassing Coordinator

Your Canvassing Coordinator will find and assign volunteers to canvass households in the polling district, door-to-door or by telephone, and strategically plan when and where to canvass. They may also develop a canvassing script with the communications team.

The coordinator collects the information gathered by canvassers and consults with the campaign team about updating databases and planning follow-up actions.

Canvassers

The main goal of canvassing is to identify your voters and get them to cast their ballot. Canvassers identify where campaign signs can be placed and whether supporters are willing to volunteer. They share information about advance polling opportunities and ask whether supportive voters need a ride to an advance poll or on Election Day.

Campaign Headquarters Office Manager

Your Campaign Headquarters Office Manager will look after campaign headquarters, including replenishing office supplies. They often welcome guests and volunteers, and answer and retrieve messages from the main phone line.

Depending on the structure of your campaign, they may maintain a database or voter lists for your campaign, important in identifying your supporters and getting the vote out.

Poll Coordinator

Your Poll Coordinator is responsible for finding a poll captain and scrutineers, the volunteers who watch the counting of the ballots, for each electoral or polling district for polling day. They also call in final numbers to the campaign headquarters as they become available on Election Day for an unofficial tally of votes.

Election Day Coordinator

Your Election Day Coordinator will organize the scrutineers' Election Day schedules, organize drivers and day care for voters who need them, post polling results in the campaign headquarters as they become available, and organize the post-election party for the evening of polling day.

Preparing for Campaigning • Summarizing Research

The following template is designed to help you pull all of the information you have gathered together in one place to develop a comprehensive campaign plan.

How would you describe the riding in which you will be running?

Who are the voters in the riding?

What has happened in past elections in this riding?

What are the factors/issues that will influence this election?

Who are your opponents, and what do they stand for?

What sets you apart from your opponents?

Preparing for Campaigning • Voter Contact

The most effective ways to reach out to your constituency may differ depending on your location. Consider the demographics in your area, what methods have worked in the past, and set a target number of constituents you want to connect with.

Target Group	Methods to Reach Them	Numeric Target
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Setting a Goal

Based on your riding and the number of campaign volunteers/ staff you have, set a 'votes won' goal.

The total **population** of the riding is: _____

The total **number of voters** is: _____

Expected turnout in this election is: _____

We will win if we receive this number of votes: _____

Canvassing

One of the most important activities for any candidate is door-to-door canvassing. A one-on-one connection with the voter is critical, putting a face to your platform and views, and allowing voters to ask questions about your plans for the community and your stand on various issues.

While many ridings are geographically large, make every effort to visit each household at least once. A second visit is desirable, particularly in areas with large numbers of undecided voters.

While some campaigns include phone-based canvassing, elected candidates have consistently attributed their success to their door-to-door canvassing.

Make every effort to visit each household at least once.

The Strategy

Typically, campaigns include up to three canvasses, each with a different goal:

- The first canvass will be early in the campaign, focusing on delivering literature, and meeting your constituents.
- The second canvass is your main canvass and will be the primary source of voter identification information.
- Held just before Election Day, the third canvass should concentrate on undecided and unidentified voters.

Canvassers should focus most of their time on voters who seem undecided or who may be leaning towards supporting you, thereby consolidating your support!

Regardless of how many canvasses your campaign can manage, it is crucial to remember that the goal is to identify the intentions of as many voters as possible.

Do's and Don'ts of Canvassing

Do:

Do have a team of well-spoken representatives to join you for canvassing.

- Your team should be trained with a canvassing script and be familiar with who you are as a candidate and your main messages and platform.
- Your team should be able to identify supporters who will vote for you on Election Day.

Do take pamphlets with you that summarize who you are and where you stand. If no one is home, leave literature in the mailbox or on the door latch so voters know that you took the time to visit their area.

Do keep a written record of homes you and your team have visited. Track whether the voters in those homes will support you, your opponent, or remain undecided.

The door-to-door canvass is also your opportunity to ask if the voter will display a lawn sign on your behalf.

Don't:

Don't canvass early in the morning, after 9 pm, or at mealtimes.

Don't canvass alone. A candidate or volunteer should never go canvassing door-to-door alone. Be mindful of safety considerations, including house pets such as dogs. Also be mindful that some voters who support your opponents, or who have sexist or racist attitudes, may intend to keep you there for a long time in order to delay you from getting to other households.



Public Events

Get to know your constituents, and demonstrate that you are engaged in the community, by attending community events.

The more events you attend, the more you will be able to connect with voters and share your beliefs and agenda.

This can be particularly important in rural areas, where the geographic size can make it difficult to connect with every voter.

Debates

The decision to attend, or not attend, an all-candidates debate can be a strategic one. Voters and media expect candidates to participate in all-candidate debates.

Debates give candidates a platform to share their beliefs, agenda, and passion with a broad audience that includes supporters for all sides.

- Prepare and practice your opening remarks, and do not exceed the time allotted.
- Ask your supporters to attend with questions you can prepare for.
- Be polite and courteous with everyone throughout the event, including the hosts, staff, opponents, and the audience.
- Keep your temper. Remember that your opponents' supporters are likely in the audience, and may ask questions they know will agitate you.
- Keep your responses concise.
- If your opponents begin arguing back and forth, wait for an opportunity to calmly interject a balanced remark. You will be seen as a voice of reason, and the best person for the job.
- Unless you are answering a direct question from another candidate, aim your remarks at the audience.



How much will your campaign cost?

Candidates usually have 3 main sources of campaign funds: individual contributions/donations, personal investment, and party contributions.

If you are the party's nominated candidate, you will have the support and experience of the party organization, its fundraising committees, and possibly access to funds from your party riding association that may have accumulated since the last election.

Who and How Much

In municipal politics, individuals, companies, and organizations may donate to candidates, and are not subject to donation limits.

In provincial and federal politics, only Canadians citizens can donate, and within limits related to both contribution amounts and residence requirements.

Different fundraising rules apply to the various levels of government. Know the rules for your level of government.

Fundraising: What works?

Depending on the level of government and the party organization, different methods of fundraising may be traditional in your area.

Yard sales, auctions, bake sales, car washes, and dinners all remain effective ways of raising money, and also serve as a way to introduce yourself and your team to the community.

Your riding association may host fundraising events for your support base, such as workshops or dinners.

Other fundraising strategies depend to a large extent on direct solicitation by phone or email.

Flyers, emails, and other campaign materials should always include an opportunity to donate to your campaign, and include the mailing address where cheques can be sent, and a website where donations can be made securely.

Tax breaks

Donations to federal and provincial candidates are eligible for income tax breaks and subject to donation limits. Donations to municipal candidates are not tax refundable, and are not subject to donation limits.

Provincial & Federal Elections

Provincial and federal elections can be very expensive and require an organization and management strategy that calls for greater spending. If you have already been nominated to represent a party in an election, you will have financial and resource backing from your party.

These funds are usually raised by the local party association in preparation for an upcoming election, so the amounts available will depend on the party and the riding association where you will be the candidate.

Make sure you are clear about your personal financial responsibility as well as the campaigning limits and associated rules for both your nomination and elections campaign.

To estimate how much money you will need to run a successful campaign, look at the returns for the last election at your level of government in your riding. Included in these returns are lists of candidates' expenses broken down into categories such as personal expenses, office rental, travelling expenses, goods supplied, and advertising. Although expenses will vary from riding to riding, party to party, and individual to individual, you will get a general sense of how much it will cost to be competitive.

Be sure to check the appropriate elections act and the established spending limits.

In federal and provincial elections, candidates who secure more than 15 per cent of the votes in their polling district receive an election rebate from their level of government. The rebate received from public funds, such as the Provincial Consolidated Fund, is based on the number of people in the riding and the number of candidates who receive more than 15 per cent of the votes.

To estimate this amount, find your riding in the "election expenses of candidates" section in the returns for the latest election. If you are eligible for a \$20,000 reimbursement, but you only spent \$10,000 on your campaign, you will receive only what you actually spent.

Do not count on this money until after you have received more than 15 per cent of the vote. Many candidates are disappointed to find they are ineligible for the rebate, particularly in elections with many candidates.

Set a goal for your team to fundraise as much as possible before the campaign officially begins so you can focus on campaigning instead of raising funds during your campaign.

Municipal Elections

With the exception of mayoralty and amalgamated municipal campaigns, municipal level campaigns can typically be run on a limited budget.

Unlike provincial and federal elections, there are no party campaign funds for candidates, and fundraising is left almost entirely up to the individual and her campaign team. Also, unlike provincial and federal donations, municipal campaign donations are not tax-deductible, which may deter financial contributors.

Estimating Your Campaign Budget

Determine which expenses are necessary, and which are not vital, but would be beneficial to running a successful campaign.

You may select some, or all, of the components in this campaign budget worksheet as appropriate to the size and style of your campaign, and the budget you have available.

Obtain realistic estimates—do not guess. Have a member of your campaign team call or search online for current rates of photographers, printers, media agencies, office supplies, phone companies, and so on. Look for opportunities for bulk purchasing and competitive pricing.

	Pre-Campaign	Election Campaign	Post-Election	TOTAL
EXPENSES – INCOME OUT				
Promotional Materials				
Professional photo(s) of candidate				
Posters (graphic design and print)				
Flyers and leaflets				
Lawn signs				
Paraphernalia (buttons, stickers, pens, etc)				
Invitations				
Photocopies				
Media & Communications				
Radio ads				
Billboards				
Newspaper ads				
Social media ads				
Website (design, hosting costs, etc.)				
Press events				
Mailouts				
Fundraising				
Events				
Meetings				

	Pre-Campaign	Election Campaign	Post-Election	TOTAL
Campaign Headquarters				
Office rent and utilities				
Phones, internet, TV/cable				
Supplies (paper, pens, etc.)				
Office technology (computers, printers, etc.)				
Coffee/tea/refreshments				
Postage				
Volunteer expenses				
Staff / consulting fees (if applicable)				
Voter Contact				
Voter list				
Canvassing (door to door)				
Community meetings				
Get Out the Vote				
Transportation				
TOTAL EXPENSES				

REVENUE – INCOME IN				
Candidate contributions				
Political Party contributions				
Donations				
Fundraising events income				
TOTAL INCOME				

TOTAL EXPENSES				
TOTAL INCOME				
CASH FLOW				
CASH-ON-HAND				



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