

# Funding the Next Generation

A Children's Fund Campaign Manual



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## Welcome to the world of children's fund campaigns

You have joined an amazing and inspirational group of advocates from across the country who are working to deliver a better future for the next generation. *50+1 Strategies* and *Funding the Next Generation* have worked together to create this manual as a guide to those interested in leading this work in their own communities.

This manual is a guide to creating a local children's fund through the ballot – giving local voters the opportunity to directly allocate funds to children and youth services. There are other approaches to generating public funding for children's services (e.g. through the annual budget process) and *Funding the Next Generation* has materials to help you decide the right approach for your community. Note that while this manual is focused on California, most of the information will be relevant to cities and counties throughout the country.

Every campaign is going to be different. There is no one-size-fits-all approach to political campaigns. Our hope is that this manual, in conjunction with other *Funding the Next Generation* materials, will provide a baseline of knowledge to help you run a campaign of your own.

**This manual is not intended as a substitute for professional consultation from lawyers, election officials or campaign consultants.** It is intended to serve as an introduction to running a children's fund campaign. Once you've finished this manual you'll be armed with all the information necessary to understand the campaign process. With the support of your staff and a strong team around you, this manual will provide the tools you need to run an effective, and hopefully successful campaign.

In putting together this manual, we tackle campaigns methodically. We will start with the basics of setting up the pre-campaign infrastructure you need to legally run a political campaign. We will then address the day to day operations of running a campaign. Finally, we will discuss how to work with your campaign team to create a successful campaign infrastructure.

Remember, you are not the first person to run a political campaign, so you should not feel like you have to reinvent the wheel. There are plenty of people who can and will provide you with the help and support you need to achieve victory.

Throughout the manual, we've included tips, case studies, and templates for you to use. These additional tools provide some extra context, and practical examples to help get your campaign off the ground.

It's likely that, at first read, this manual will seem overwhelming. Do not let that worry you. Campaigns inherently are full of ups and downs. Our hope is that this manual can prepare you for some of the biggest challenges you will likely face, while also helping you achieve the confidence you will need to lead the way.

*Funding the Next Generation* and our network of advocates, consultants and advisors are available to help you take the next steps to get the ball rolling on your campaign.

**GOOD LUCK!**



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# 1

## Transitioning to a Campaign

It is likely that you have spent years bringing together your coalition, talking about the services your community needs for its children and youth and brainstorming potential ways to fund them. The time you have invested in organizing and community outreach so far will lay the foundation for your campaign, but moving to the ballot will bring new challenges.

Now that you are starting your campaign, a lot of decisions need to be made before you get to the ballot box. This section will explore the transition to a campaign in some more detail. While this chapter contains an overview of the transition process, more information on funding streams and services is available in the *Funding the Next Generation* manual “*Creating Dedicated Funding Streams for Children’s Services.*”

Every district is different, and a children’s fund ballot measure in San Diego will look different than one in Sonoma. The actual drafting process could take as much as two or three months and will require the support of some experts, such as a law firm which specializes in drafting ballot measures. Before you can draft the measure there are a lot of decisions that need to be made about your children’s fund. What are the different funding options? What services will you include? How do you make these decisions?

This whole process could take several years and it is important to invest time and energy into finding the right mix of services, and potential partners, and funding stream for your measure.

In the end, the decisions you make about which services will be funded will be based on a creative mix of polling results, data about children’s needs, the consensus of the major stakeholders – or even including the priorities of a large group of volunteers ready to be the foot soldiers of the campaign or the personal passion of the leading public official putting his/her resources and reputation behind the campaign. This decision is as much an art of strategically considering many factors, as a science. In that sense, it is like many other aspects of a campaign.



“When is the right time to pull the trigger? You obviously want to get as much support as possible, but don’t want to tip off your opposition. In hindsight, I’d say you can never have too much time.”

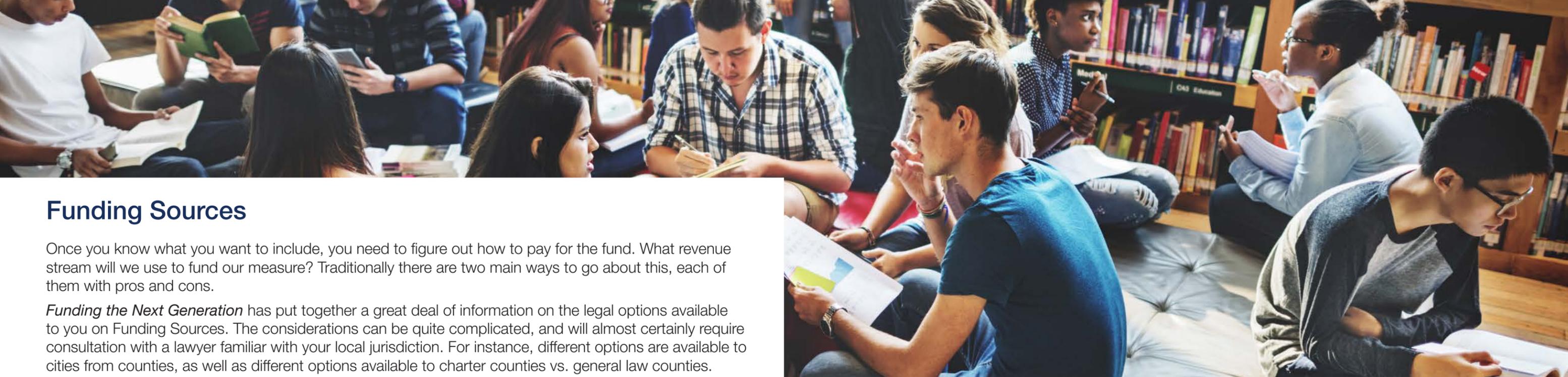
*Kathy  
Campaign Manager, Marin*

### What services do you want to include?

Try an exercise to define what your perfect measure would look like. Forget about funding or political realities. If you could include every service you wanted in the measure, what would it look like?

You don’t have to have all of the answers yourself. Convene a roundtable of other people who are passionate about funding services for children and youth and work together to identify the programs you’d love to include in the perfect measure.

Your final measure almost certainly won’t contain everything in your perfect measure, but you should start the process by defining everything you want to include. Is the focus of your measure children, youth or both? Are you focusing on expanding existing programs, or creating new ones? Who will be in charge of administering these resources?



## Funding Sources

Once you know what you want to include, you need to figure out how to pay for the fund. What revenue stream will we use to fund our measure? Traditionally there are two main ways to go about this, each of them with pros and cons.

*Funding the Next Generation* has put together a great deal of information on the legal options available to you on Funding Sources. The considerations can be quite complicated, and will almost certainly require consultation with a lawyer familiar with your local jurisdiction. For instance, different options are available to cities from counties, as well as different options available to charter counties vs. general law counties.

### Budget Set-Aside

A budget set-aside basically takes existing government revenue and dedicates it for a particular use.

#### PROS

No new taxes! This method has the benefit of not increasing people's taxes, meaning they can fund children's services without having to pay anything. Sounds pretty good, right? Generally, unless there are specific local laws in place, set-asides only require 50%+1 of the votes in your district in order to pass.

#### CONS

Chances are you'll be taking money away from something else. This means a higher chance of facing organized opposition. It can also be hard to gain support from political leaders for this type of measure, as elected officials like to retain the flexibility to budget as they see fit. There are also many well-resourced groups such as organized labor, chambers of commerce, or economic development organizations that strongly oppose any budget set asides. Depending on your local laws, funds secured through set asides can often be redirected by your local elected officials without direct voter support.

### New Revenue Stream

This could be new taxes or fees such as a sales tax, while the hurdles to introducing a new tax can be high, there are some big upsides too.

#### PROS

You're not taking money away from any other cause or project, this will help significantly as you try to gain political and union support. There is also longevity. If you are successful passing this type of measure it becomes locked in and difficult to overturn. This means you likely have a dedicated funding stream for a long time into the future.

#### CONS

New taxes often come with higher thresholds, meaning you may need to win 66.67% of the votes to be successful. This requires more votes and therefore makes your path to victory harder. People are also generally skeptical of any new taxes. Some tax sources are controversial (particularly marijuana or soda taxes) and this will affect how people feel about your measure.

#### PAST EXAMPLE

##### San Francisco 2014

The San Francisco Children's Fund is a budget set aside. It was first passed in 1991, and most recently reauthorized in 2014. It takes a percentage of the city's revenue (currently about \$70 million) and puts it in a dedicated fund (The San Francisco Children and Youth Fund) for children's services. The fund is overseen by commissioners appointed by the Mayor.

#### PAST EXAMPLE

##### Sacramento 2016

In 2016, a measure was placed on the ballot in Sacramento to fund the Sacramento Children and Youth Fund through a new tax on marijuana dispensaries. Despite opposition from the city's major newspaper, the measure garnered 65.8% of the vote – falling agonizingly close to the two-thirds threshold it needed to pass.

Examples of Previous Funding Models	
City and County of San Francisco	Property tax set-aside
Marin County	Special Sales tax
City of Oakland	Budget set-aside
City of Sacramento	Marijuana tax
Solano County	General sales tax w/ advisory measure
Napa County	General sales tax for two specific purposes determined by Board of Supervisors
City of Richmond	General fund set-aside (in process)

### Marijuana taxes in California

Marijuana can be taxed in California at the city level or at the county level in unincorporated areas. Cultivation, manufacturing, distribution and even transportation can all be taxed. It is important for child advocates to become knowledgeable about this potential new source of funding. There is a strong argument to be made for services to children, youth and families to be funded from these taxes – as one way to mitigate the damage that has been done through both enforcement and inappropriate use.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- How much would you need to fund your perfect measure?
- What are the options for raising these funds? Is there a difference?
- What is the most you can realistically raise?
- How would you change your measure to fit this budget?

## Using Polling to create your measure

We will discuss polling in some more detail later in Chapter 5: “Research” beginning on page 31, but a feasibility poll can be useful in determining what services get included in your measure. You can also find more information on polling in the Funding the Next Generation handbook “*Creating Local Dedicated Funding Streams for Kids*.”

While polling isn’t perfect, it is the best tool you have to understand how likely voters might vote on a particular issue. Finding the funds to run a poll before you draft the measure can help provide clarity about what pieces to include.

A good poll will provide more information about which services local voters want included in the measure and how they feel about the different funding mechanisms. Which pieces are most popular and should definitely be in the measure? What is the least popular and should be left out of the measure? How do all of these results change your approach?

Remember, finding the right balance is going to be critical to success. Be prepared to leave out lower priority and unpopular funding needs in order to make your measure more successful.

## Drafting Your Measure

The next step is compiling all of the pieces and turning them into the potential ballot measure. If you have the support of elected officials who want to put the measure on the ballot for you, they will be able to get assistance drafting the measure. If you’re going to qualify your measure through collecting signatures, you will need to find a lawyer or similarly qualified official to help with drafting. We will discuss these two approaches in some more detail in Chapter 2: “Getting on the Ballot” beginning on page 13.

*Funding the Next Generation* has identified the major elements of a children’s fund ballot measure:

**Rationale, Title of fund, Funding mechanism, Services eligible for funding, Assurance of non-supplantation, Oversight, Administration, Planning and accountability, Severability**

Decisions regarding these elements can require a lot of background work – input from stakeholders, negotiations, compromises, and research. Once the actual drafting of a measure begins, inevitably changes will be made.

The formal drafting process could take anywhere from 6 weeks to 3 months, so start early, and leave plenty of time to draft edit and finalize your measure. Campaigns miss the ballot all the time because they start this process too late. Your consultant or campaign manager should be able to help you find the right firm to do this. Be prepared to articulate exactly how you would like the measure to look, the source of the funding, and the specific programs you want to fund.

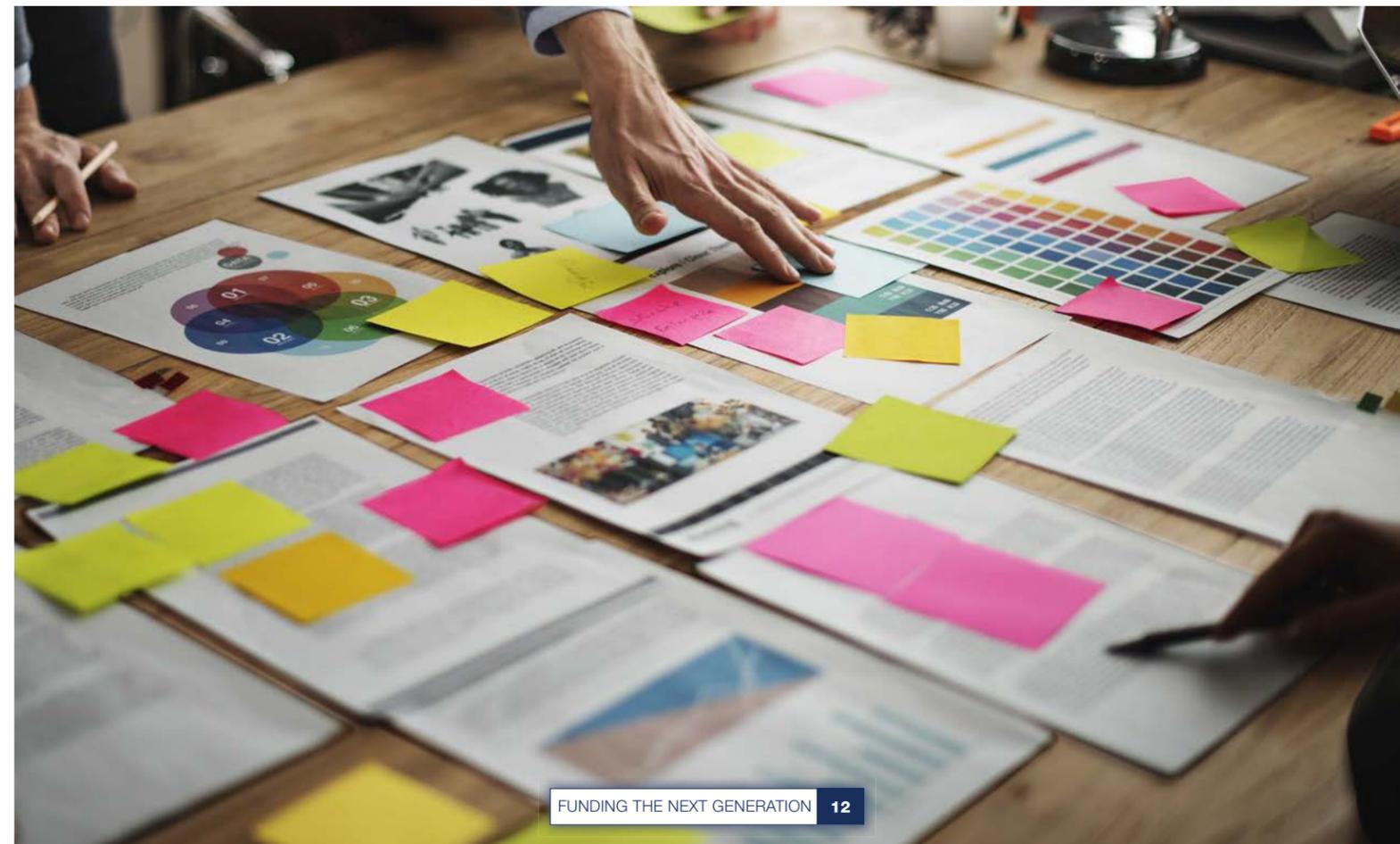
Throughout this process, your measure will continue to evolve. Creating the perfect measure is impossible, but striking a balance to draft the best measure possible, with sufficient political and public support, means making sacrifices. Be prepared to negotiate to help make your dream a reality.

## Deciding which election

You will have a choice of which election to pick for your measure. This is where seasoned political consultants can help a lot – as well as community and elected officials with lots of political experience. The general consensus is that high turnout elections are best for children’s fund measures. But that may not always be the case. Other factors to consider include other measures on the ballot, time needed to prepare, and legal considerations. (In California, funding measures can only be on the ballot when legislative bodies are also on the ballot.) Generally you will choose among a presidential primary, general election, Congressional primary and general election, each these will have a different pool of likely voters who are going to turnout. Make sure you talk to a political consultants or a pollster about when is the right election for your measure.



It is very important to give your fund a name, and make sure the name describes what it is. It is likely that the name will appear in both official information from your city or county, as well as in your own literature. Most people have simply called their funds children’s fund – some include youth, and some put in the name of the city or county.



## 2 Getting on the Ballot

There are two paths for placing local measures on the ballot: submitting signature petitions of registered voters or legislatively through support of local elected officials at the county or city level. Both options have their advantages and challenges, and the steering committee should take these into consideration during your campaign planning stage.

Most children's fund initiatives have been placed on the ballot with the support of elected officials (not through signature collection), but remember – if you go this route you are giving up control of the ballot language and what services the measure supports.

### Elected Official Supported Measure

A measure placed on the ballot by local elected officials is called an ordinance, a question, an issue, or a charter amendment. This process will require support of other legally specified number of members of the legislative body (this will change by jurisdiction). If you take this approach to the ballot, the measure will be authored by one or multiple members of the Board of Supervisors or City Council. In some places, the Mayor can also place a measure on the ballot either directly or through the legislative body.

This route is appealing if you have identified a local elected official as a champion of your initiative. Placing your measure on the ballot this way allows you to avoid the time-consuming and costly process of signature collection. However, you give up direct control over the ballot language. Extensive political outreach and analysis is required. You need to know who is willing to sign on to support the measure and who is likely to oppose it.



#### LESSONS LEARNED:

The role of elected officials once you have qualified for the ballot can vary greatly. If this is your path to the ballot make sure you clearly understand what role they are going to play once the campaign is underway.

##### San Francisco 2014

During the 2014 campaign, the committee made of local organizations that led the pre-campaign work played a significantly reduced role once the measure had qualified for the ballot. Local political leaders created their own steering committee and infrastructure to lead the campaign.

##### Solano 2016

In 2016, the Solano Fund for Children qualified for the ballot with the support of the local elected officials. The campaign made the assumption that the local Board of Supervisors would act as champions to help with fundraising and securing endorsements. In the end, this didn't happen and placed a much greater burden on the community funding coalition.





## Signature Supported Measures

Two successful children's fund measures (Oakland and San Francisco) have been placed on the ballot through signature collection. The measures were politically controversial at the time, so signature collection was the only path to the ballot for the measures.

Collecting signatures to place something on the ballot allows the proponent to have control over the ballot language. You will also have a head start on identifying supporters and developing volunteer leadership through the community outreach conducted during the signature collection process.

Cost can be a challenge. A signature collection operation requires significant staff, steering committee, and volunteer resources. You should plan to collect at least 50% more signatures than the requirement. For example, if you need 3,000 valid signatures to qualify, you should craft a plan to collect at least 4,500. This cushion will allow you to make up for any signatures that get disqualified during the verification process.

Each signature is verified by the election official's office to check if the person is a registered voter and to confirm the address listed on the petition matches the address of where they are registered to vote. The verification process typically takes 1-2 days depending on how many petitions you submit at once. It is advisable to turn in small batches every week, so that you know how close you are to meeting your goal and can plan accordingly.

You will likely want to engage a professional firm to run your signature collection program. The cost fluctuates each election cycle depending on what else is on the ballot, how many petitions you need to collect, and where you are collecting signatures. Be sure to do your research and get quotes from multiple signature collection firms.

Relying on volunteers to collect signatures can be a challenging process and you should be realistic about how many each person will be able to collect. Many campaigns will hire a professional firm to help supplement a volunteer signature drive because of time and staff limitations.

The requirements and deadlines for each of these processes vary by county. Call the Secretary of State's toll-free Voter Hotline at (800) 345-VOTE for your county elections official's contact information.

Laws about the initiative process are complex and control everything from the print size of petitions to the timelines to which jurisdictions can place measures on the ballot through signatures. That is why it is so important to consult an attorney and your local election officials. In fact, we recommend doubling back and re-consulting local officials. The campaign in Richmond, CA. for instance was given both the wrong number of signatures needed, as well as the wrong due dates for the signatures by their city election official, who had also consulted the local city attorney. It wasn't until two months into the effort that they found out the advice they had gotten was wrong.



Work backwards from the date signatures are due to build a plan and set goals for how many you can collect each week and each day. Be realistic but ambitious.



### LESSONS LEARNED:

Leave yourself extra time to submit your signatures!

#### Richmond 2016

The Richmond Children's Fund campaign in 2016 utilized volunteers and teen activists to collect signatures to qualify the measure for the November ballot. After almost six months and hundreds, if not thousands of hours collecting signatures, election officials refused to ratify the results because they were late in filing with the department of elections. This led to a two-year delay with the measure now due to be considered in 2018.

#### 2017

One county in California planned to place a general sales tax and an accompanying advisory measure (about spending the sales tax on children's services) on the ballot through the initiative process – only to learn from their attorney that it is quite probably illegal to place budget advisory measures on the ballot in General Law Counties, a fact that no one among the Funding the Next General Law network of veteran campaign experts knew. Campaign and election laws are specific – so it is ALWAYS essential to consult legal experts before going too far down the road – especially on an approach that doesn't have a long track record.

Note: If you are not from California, your state may not allow measures to be placed on the ballot by voter signatures.

## BREAKING NEWS: AUGUST 2017

In August 2017, the California Supreme Court issued a ruling in a case that could potentially make it easier for local citizens to increase or enact new taxes through the voter initiative process. The case centered on Proposition 218 (passed by voters in 1996), which limits the ability of local governments to levy certain taxes by imposing requirements such as election-timing and voter approval thresholds on the tax measure. By drawing a distinction between “local governments” and the electorate, the court ruled that the scope of Proposition 218 is limited to actions taken by local governmental bodies, and does not similarly extend to citizen-initiated tax measures. The breath of this case has yet to be determined as the court did not rule specifically on certain issues, such as supermajority requirements and other “types” of taxes that can be proposed through initiatives. It is highly recommended that you consult an election attorney when considering your own tax measure.



## The Ballot Question and The Ballot Handbook

This important piece of the campaign is often overlooked. When it comes down to it, the actual question that will appear on the ballot will probably have a greater impact on how people vote than anything else. For many people that is ALL they will see before they vote yes or no. It is important to pay attention. The City or County attorney will actually write the question. If you have an ongoing relationship with that person, it will help. Also, you probably have the legal right to take issue with the drafting (as happened the first time in San Francisco). You must know all the timelines, when it will be drafted, when it will be made public, your legal rights to appeal, and what you want it to say.

### Consider the difference between a question that reads:

*Shall the City be required to set aside a certain amount of the property tax revenues annually for ten years, to be used only for certain additional services for children?*

*Shall the city create a children's fund to be used only for additional services for children, by setting aside a certain amount of the property tax revenues for ten years?*

In the first example, the word “children” appears at the very end. That is what the City Attorney first drafted for the nation’s first dedicated annual local fund for children. After a legal appeal, the word children was the fifth word!



Make sure the word “children” appears in the first phrase of the ballot question – if at all possible – and the word “tax” appears at the end. And remember, if you name the fund in your actual measure that will increase the likelihood that it will appear in the question.

The next step will be to write a ballot argument and then to refute the opponent’s argument that will appear in the local Ballot Handbook. It is important to be very strategic about this part of your campaign. This is the one piece of literature that will go to every single voter. You will have word and time limits. Whether you are a community group sponsoring the legislation or elected officials, this is a very important part of the campaign. Everything counts – the layout, the credibility and diversity of those signing the argument, and of course the words that are used. You can use the argument to point out major supporters, the current scope of the problem and the benefits of the solution.

In some cities, there can be paid additional arguments in the ballot handbook. This is an awesome opportunity to continue to make the case, and more importantly, to demonstrate the scope of support. In the original children’s fund campaign in 1991 in San Francisco, 26 arguments were submitted by groups and individuals ranging from neighborhood activists, to nonprofit, to business people, to various labor supporters to the Police Officers Association.

# 3

## Creating your Steering Committee

Running a successful campaign takes a village. No one person has the time, skills or expertise to do every aspect of a campaign by him or herself. Finding the right mix for your campaign steering committee will make a more efficient and successful campaign in the long run.

Your campaign steering committee is the primary consultative and decision-making body for your campaign. Every campaign has a different decision-making structure and some steering committees have more direct control than others. Regardless, you, and eventually your campaign staff, should regularly update the steering committee and committee members should be included in all major decisions relating to the campaign. It is important that the steering committee has pre-set voting rules and processes in place to deal with any disagreements if they arise. The steering committee should have a range of expertise to help keep the campaign on track and should include individuals who can each provide significant support around key campaign responsibilities.



### TIP

Your steering committee is the central decision making body of your campaign, make sure your chair is someone with deep knowledge of the issues, and the skills to negotiate and find solutions if and when conflict arises in your determinations

## Committee Size & Structure

It is important to find the right size for your steering committee. If your committee is too large, decision-making can become impossible. If it's too small you'll miss out on expertise that could make a big difference to your campaign. Between 6-10 members is probably the sweet spot, but feel free to adjust this as you identify the specific needs of your campaign. Don't be afraid of evolution in your steering committee. Throughout the campaign your needs will change. Early on fundraising and political relationships will be more important, later in the campaign volunteer recruitment will be critical. You should be ready to add, subtract or replace people so you are matching your needs at different stages of your campaign.

If there are other people or organizations who want to get involved, consider setting up an Advisory Committee. The Advisory Committee can provide advice on major pieces of the campaign without being as intimately involved as the steering committee. They can also provide much needed support with event planning and volunteer recruitment.

### San Francisco 2014

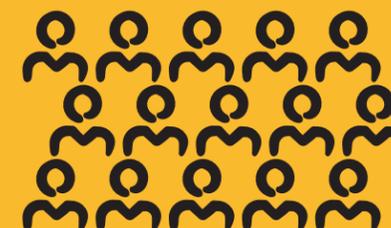
During the 2014 campaign in San Francisco, there were two separate committees for the campaign. Initially, there was a steering committee with eight members. This committee was primarily responsible for overseeing all aspects of the campaign. They would meet weekly and had decision-making authority for the campaign. There was also a campaign Advisory Committee, which had almost 40 members, but didn't have any decision-making authority. They met bi-weekly and helped offer strategic advice, provide additional support for major events and source volunteers for voter contact events. This dual committee format allowed the campaign to leverage the skills and insights of the larger advisory body, but kept decision-making streamlined and manageable.

PAST EXAMPLE



Steering Committee  
(8 Members)

Decision-making Authority



Advisory Committee  
(40 Members)

Supports events and source volunteers

## Who should be on the committee and what skills should they bring?

While there is no perfect formula for a steering committee, there are some essential pieces that every campaign needs. Having a mix of skills and experiences will reduce the burden on you and help make strategic decisions. Your steering committee will have a lot of responsibility in the campaign. Make sure you have people that are ready to roll their sleeves up and get to work!

**As you plan your steering committee membership think about including people with expertise in some or all of the following areas:**

### Fundraising

There is one thing every campaign needs: money. Your steering committee should include someone (or multiple people) with experience in raising money for political efforts. This person should be involved in the planning and execution of campaign fundraising strategy, and be responsible for bringing money in the door. This person could be a Board member of a well resourced children's agency or nonprofit.

### Endorsements

Every steering committee needs people who can help manage political relationships. Generally this would be a member of the local Board of Supervisors or City Council, but this could be anyone that has strong political relationships within your community. His or her focus should be building support with key unions, political parties and other elected officials. Where possible, you should always try to get representation from across the political spectrum. Consider political leaders with a history of support for children or youth.

### Policy Representatives

A children's fund involves many intersecting policy areas (childcare, school, youth policy), make sure each of these areas is represented on your steering committee. Many CBOs will have a direct stake in the success of your campaign. Make sure to get them involved and leverage their expertise.

### Volunteer Recruitment

A strong volunteer base is an important part of any campaign and finding volunteers takes time and energy. Consider adding someone to the steering committee who can help you recruit and mobilize volunteers. For example, someone at a community-based organization, such as your local Boys and Girls Club, who has connections to the community that can help recruit supporters or volunteers. You should also try and have a youth voice represented on your steering committee.

### Spokesperson

Most likely, you're not going to be able hire a spokesperson, but you can get around this by finding a steering committee member, or members, who can serve as spokespeople. Look to leaders at CBOs who have credibility and expertise on children's issues.

Make sure you find passionate and knowledgeable spokespeople who are seen as non-partisan, and whose personal politics or affiliations will not reflect negatively on your campaign.

### Staff

Whoever is running the day-to-day campaign operations (Campaign Manager/Coordinator) should be a member of your steering committee. You should also include your campaign consultant if you have one. Remember, these staff members are professionals for a reason, and you should include their expertise in any important campaign decisions.



### TIP

The most important criteria for steering committee that it be people who care deeply about the success of the campaign.

**"We put together a youth committee for our campaign.** Every organization nominated 1 to 2 young people to be a part of the committee. They were involved in all major decisions. We also provided training on campaigns, messaging and canvassing!"

*Jamileh  
Campaign Manager, Richmond*

## Making the Steering Committee Ask

Making the right ask is a critical piece of any organizing work and the "ask" of everyone on the steering committee will be different. If someone can only commit 4 hours per month you want that time spent in the most effective way, even if they can't attend every steering committee meeting.

As an example, having access to an elected representative's political relationships is more important than having them attend every meeting. So, make it clear upfront that they only need to attend one meeting each month if they can send a staff person to the other meetings and consistently support the campaign.



### TIP

**Be clear on your ask.**

Is it time?

Is it a specific fundraising goal?

Is it political support?

Some of these pieces might seem intuitive, but structuring your ask properly can be the difference between someone saying yes and no. Clearly articulate what you need, be direct about when and how you need it, and get a firm commitment. If they can't commit to joining the steering committee, you can still find a ways to involve them in the campaign.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- What is your preferred steering committee size and structure?
- Who is on your ideal steering committee?
- What is your ask of each of those members?
- Who was missing from previous steering committees that should be on yours?

PAST EXAMPLE

#### Previous campaign Steering Committee makeup

##### Richmond

- 30 Local Children's focused Community Based Organizations x3 (Policy/Youth engagement)
- 30 Consultant with expertise on children's funds
- 30 Asian Pacific Environmental Network (political organizing experience)
- 30 Member Board of Supervisors (Political champion)
- 30 Campaign Coordinator

##### San Francisco

- 30 Member Board of Supervisors (Political Champion)
- 30 Member Board of Education (Policy Expertise)
- 30 Member Children's CBO (Youth Engagement)
- 30 SF Office of Early Education Representative (Policy Expertise)
- 30 Campaign Consultant (Campaign Expertise)
- 30 Campaign Coordinator (Campaign Expertise)
- 30 Fundraising Expert



# 4

## Staffing and Responsibilities

Elections can be daunting, but they don't have to be if you have the right team around you. Quality staff are an important part of any successful campaign. This section will talk about potential roles on the campaign, which pieces will require staff support, which pieces might require staff support, and which pieces can be done by campaign volunteers or steering committee members.

### Finding a General Consultant

If you have the resources, you should approach a campaign consultant to provide strategic support to your campaign. You should look for a consultant with experience running similar ballot measure campaigns or running campaigns in your county (preferably both). A campaign consultant will help you develop your campaign plan, provide advice on your budget and answer key strategic questions that must be answered early in the campaign. They will also help you find staff and other vendors.

Use the *Funding the Next Generation* network to as a resource so you can identify the right consultant to support your campaign. A good consultant will provide a level of services to fit the needs and resources of your campaign. For smaller campaigns, many consultants offer packages to get your campaign infrastructure prepared and your staff hired. This will significantly reduces associated costs. In any event, a good consultant can also recommend other vendors who can provide the services that they don't offer.



#### TIP

There will likely be a range of political consultants who fit the needs of your campaign. Add some time to your process to allow them to bid for opportunity through an RFP (request for proposal) process and don't forget to check references!

### Importance of Staffing

It will be difficult to run a campaign without any staff. There too many pieces for a volunteer to manage by themselves, especially if they haven't run a campaign before. Campaigns that invest money in good staff have a much better chance to win. Ultimately, the number of staff on your campaign will depend on the resources you have available, the size of your community and the support for the campaign. This section will identify the skills you need to make your campaign successful and help you to make decisions about how you prioritize the funding available for staffing.



### BRAINSTORMING FOR YOUR CAMPAIGN:

#### Youth Leadership

A children's fund campaign is a great youth development opportunity. The right youth leaders can make strong campaign spokespeople and energetic campaign volunteers. Many high schools in California require students to volunteer and a children's fund campaign is the ideal place for them to do it. Consider setting up a Youth Committee, as they did in the San Francisco and Richmond campaigns, and set up training and development opportunities to build leadership and grow campaign capacity.

## Campaign Roles

### Manager/Coordinator

Every campaign should have a Campaign Manager or Campaign Coordinator. This person will be the heart and soul of your campaign. Your Campaign Manager will need to wear many hats throughout the campaign and be the one responsible for coordinating every piece of your campaign. This person needs to possess the passion for the cause and be committed to the long hours it will take to successfully manage this race. For this type of role, you should look for someone who has strong connections to the community AND experience working on political campaigns.

In a perfect world this person would be hired in 6-8 months before Election Day, potentially even as early as 12 months before the election. If there was someone who could fill this role as a volunteer, or someone who could do it on a part-time basis it might be possible to wait until later in the campaign to bring someone on full time.

If this is the only full-time staff member you hire, it is important that your Campaign Manager has previous experience managing a canvassing or phone banking program. For most of the campaign, this person will have direct responsibility for training volunteers for these types of voter engagement.

Priority 1 – Should be hired as early as resources will allow. No later than 6 months before Election Day.

### Treasury and Compliance

Before you can raise a dollar or pay for anything, you must know the rules and managing campaign finances requires expertise. Every county has its own specific electoral laws and with rules and regulations constantly changing there is no “one size fits all” approach to campaign financing. Penalties for campaigns which don’t comply can be extreme and engaging someone who understands your local election laws is an essential piece of your campaign.

Priority 1 - A treasury and compliance firm should always be engaged.

### Fundraising Support

There is NO perfect approach to fundraising, but you will need an experienced person to help coordinate your fundraising efforts, if you don’t have the resources to hire a fundraising specialist. It is important that you identify a volunteer or staff member to fill this role. You will need him/her to help identify new sources of funds, assist the campaign in running events and, most importantly, to teach you the basics of good fundraising. This person won’t necessarily raise the money for you but they should have the expertise to make your fundraising operation smoother and more efficient.

Priority 2 - Fundraising support will be required early and will be critical to your campaigns success.



### Coalition Building

If you have additional resources available for your voter engagement program, you should consider hiring someone with the sole responsibility of leading these efforts. You would be well served trying to identify someone who has deep ties to local youth organizations or someone who has access to a large volunteer network. They should focus their time on identifying organizations that could benefit from the measure and building relationships that will help mobilize volunteers for phone banks or canvassing. If need be, this person can be hired part-time.

Priority 3 – This position could be for as little as a month or could be hired earlier if there is extra funding available.

### Volunteers

Volunteers are the backbone of most campaigns. Your steering committee will likely all be volunteers, but many campaigns also recruit volunteers to help with running phone banks, hosting campaign events or for their canvassing program. It is important that you are honest with your supporters about the capabilities of your campaign, and ask them to help where you need it. Volunteers want you to succeed and will need the right training to help you get it done. Your Campaign Manager should be able to train these volunteers as leaders and volunteer recruiters.

“The field campaign was done by young people through EBAYC (a local community based organization). We had two parallel canvassing, door to door and phone banking programs for the last 6 weeks. They were the power behind the campaign. They had a great experience. This was another major success of the campaign. **Hearing how excited and committed they were was amazing. They hadn’t had an opportunity like this before.**”

*Claudia*  
Campaign Volunteer, Sacramento



## The Role of Nonprofit Children and Youth Agencies

Nonprofits can be the heart and soul of your campaign. They are often the most knowledgeable about both the gaps and benefits of children’s services; and they will benefit from having a new funding source. The 2016 campaigns in California had high hopes that the nonprofits in their communities would provide most of the volunteer help. But, while many nonprofits stepped up in various ways, their involvement was less than the campaign leaders hoped for. First was the obvious reason, people working in nonprofits are already over-worked. Second, was the culture of nonprofits – which were not used to political activity – and even suspected that it was not legal for them. Because this is a common dilemma, we offer the following recommendations:

- Engage your nonprofit colleagues and allies early on in the process of creating the measure. That way they will be invested in the outcome.
- Conduct several training and orientations about what a campaign is, what activities are involved, and what is legal and what isn’t for nonprofits. One training/meeting is not enough. Start early with this process.
- Target program staff and managers for engagement. ED’s are important in making big decisions, but they simply are too busy to do much real work.
- Present to the Boards of Directors of as many nonprofits as possible, so they understand what is involved and can become part of the campaign.
- Require active participation and contributions to the campaign to have a voice in decision-making.

### BRAINSTORMING FOR YOUR CAMPAIGN:

- If you had unlimited resources how would you allocate campaign staffing?
- Which of these roles could you fill with volunteers?
- What does your potential staffing structure look like?

# 5 Research

Campaigns use research to help inform strategy, communicate their message more effectively, and identify opportunities and risks. There is basic research that you can do, and there is public opinion research that is conducted by a professional polling and research firm. Most winning campaigns will do both. When approaching research, there are three areas that you will want to focus on: topic, supporters and opposition, and public opinion.

## Topic

You should do a significant amount of research on your own during the early stages of your campaign. Start with researching everything happening about children's policy in your area. Stay abreast about the most relevant and important issues and current events—what is politically relevant at this time? Examples could include funding for after-school care, early education programs, school lunch programs, adolescent job training, or juvenile justice and intervention services. Look for information and data that can help you make your case for passing your measure.



### TIP

Elections at national and state levels can drastically change the policy landscape - make sure you research how these changes might affect your measure or help change your pitch to voters.

## Supporters and Opposition

It is wise to do a basic internet search on the members of your steering committee and key campaign supporters. Anyone that may act as a public spokesperson of the ballot measure must be vetted appropriately to ensure that your opposition does not uncover something that could be used to discredit your campaign. Look for basic background information, education and work history, information on political affiliation, newspaper articles, and any criminal records or civil cases.

Conduct similar research on your opposition. You need to have a real understanding of your opponent's strategy and their background. This starts with gathering as much information as you can. Who is leading the opposition campaign? What do they stand to gain by opposing this measure? Where is the funding coming from? What other issues or campaigns have they been involved with? Knowing this information will put you in a much better position to respond to potential attacks.

### PAST EXAMPLE

#### 2016 in Solano and Marin

We have learned to expect opposition from anti-tax groups. The campaigns in Solano and Marin were taken by surprise when several weeks before the election huge signs appeared throughout their counties opposing their measures. The signs were actually illegal, and they misrepresented the measures. However, it was too late to push-back. This sort of thing happens a lot and people should be ready for it.



## BEST PRACTICES

- Set online alerts for specific topics and keywords related to your measure
- Monitor social media sites and follow key influencers
- Look up facts or statistics for press releases
- Find information on key stakeholders involved
- Use the Pew Research Center to look for studies or topics that are relevant to your measure

## Public Opinion

Public opinion polling is more than just numbers and percentages; it should help you understand how voters feel and help you craft a messaging strategy that will move people toward supporting your ballot measure.

Polling is highly valuable, but it can be expensive. You will need to hire a research firm (aka pollster) who will help you design and execute your research.

They will work with you to create and manage the entire research process including:

### Research instrument design

What questions are you asking and what order are they in the poll?

### Sampling and recruitment plan

Who will you talk to and how will you reach them?

### Data collection

How will the data be collected and presented?

### Analysis and interpretation

What does the data say and what does it mean for your campaign?

You should plan to spend around 10-15% of your campaign budget on quality research. Keep in mind the cost of each poll depends on how many people are surveyed, how many questions are in the poll, and how long is spent collecting results. Be sure to get proposals from a number of public opinion research firms. You should consider their rates and approach; whether they have experience on child-related issues and/or tax measures; their familiarity with the local community; and their reputation.

## Types of Polling

Use polling to help direct your messaging and voter targeting to ensure you are talking to the right voters right away—and not use messages that are ineffective or waste time communicating with voters who are unlikely to support your measure.

Ideally, the first step is to invest early in a **feasibility poll** that will help craft the content of your measure and identify the most compelling way to talk about it. Not all campaigns are able to do this because of time or financial constraints, but the goal is to determine what voters care about. A feasibility poll can also help your steering committee select which services will be funded through your measure. Many will also use this type of polling to determine the most effective language to use for drafting the initiative.

Often, campaigns will also conduct a **baseline poll** in the early stages of planning to test the campaign messaging and to identify your supporters, opponents, and persuasion targets. Your polling data will offer an important information on the mood of the electorate and help identify which issues they care about most. If you're aiming to be on the November ballot, you should conduct a baseline poll in the spring or early summer – before you develop your campaign messaging or conduct any direct voter contact. This information will inform your campaign plan and nearly every tactical and strategic decision you will make.

In terms of content and questions, a baseline poll should test different campaign messages and messengers. A well crafted poll offers a frank assessment of the voters' knowledge of the potential initiative, the measure's strengths and weaknesses, and the appeal of your campaign's message. Once you test the message, you need to determine who is going to be most effective at delivering it. Options could include a student, parent, law enforcement leader, pediatrician, teacher, or local elected official. You may decide to have a mix of messengers, but the baseline poll can help you determine which voices are the most compelling. It is also a good idea to test how voters in the district prefer to get their information – *local newspaper, direct mail, tv ads, radio ads, online sources* – and use this to inform your voter contact strategy.

You may also consider doing a **tracking poll** in the final weeks of your campaign to measure shifts in public support. This type of research measures changes in opinion or knowledge among the same group of people over a designated period of time. The data allows you to monitor shifts and prepare for course correction during the critical weeks leading up to election day.

For additional information on how your measure can utilize polling, please see the Funding the Next Generation guide “*Creating Local Dedicated Funding Streams for Kids.*”



### TIP

If your campaign lacks the resources to do extensive public opinion polling, you should try to attach your measure to another poll. Oftentimes, allied campaigns can help by including a question or two about your measure. The data may be minimal and you will have little control over how and when the poll goes into the field, but it will give you some insight into how your measure is perceived.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- Your pollster will take the lead on designing the poll but you should provide input on the questions being asked, the survey size, where the data is sourced, and how long the survey is in the field.
- Make sure your research and polling reflect the electorate by comparing the demographics of your sample to the voter demographics.
- If you can only do one poll, it is best to do a baseline poll 6-7 months before from Election Day that thoroughly tests your campaign message against opposition messaging, identifies your supporter base, and tests persuasion messages.



# 6 Political Outreach

From the beginning of your organizing and community outreach efforts right through to election day, political outreach is a critical piece of the puzzle. Throughout the campaign there are many roles local political leaders can play, such as: neutralizing your opposition; acting as spokespeople; securing endorsements; or helping you to find donors.

Even if you have spent time building relationships during your foundation building phase, as you transition to the ballot you need to increase your political outreach. It's important to start this outreach early so that you understand before you draft your measure who a likely supporter is and who a likely opponent could be.

### There are a number of advantages to starting outreach with elected officials and political influencers before the measure is drafted:

1. Some might sign up to support your measure now with just few small amendments
2. They may have suggestions on potential partners and funders for your measure
3. You may be able to neutralize your opposition by removing anything that is strongly opposed
4. Elected officials can help you improve the measure with their knowledge of government funding programs

### Who to talk to?

#### Elected Officials

Reach out to people across all ideological backgrounds at all levels of government

#### Organized Labor

Who are the largest unions in your county? Is there a way you can secure their support or neutralize their opposition?

#### Major Local Organizations

Chambers of Commerce, nonprofits, senior citizen groups, political clubs, youth organizations, etc.

There are going to be a lot of curveballs throughout your campaign, and elected officials are an excellent resource to provide advice in how to overcome these challenges.

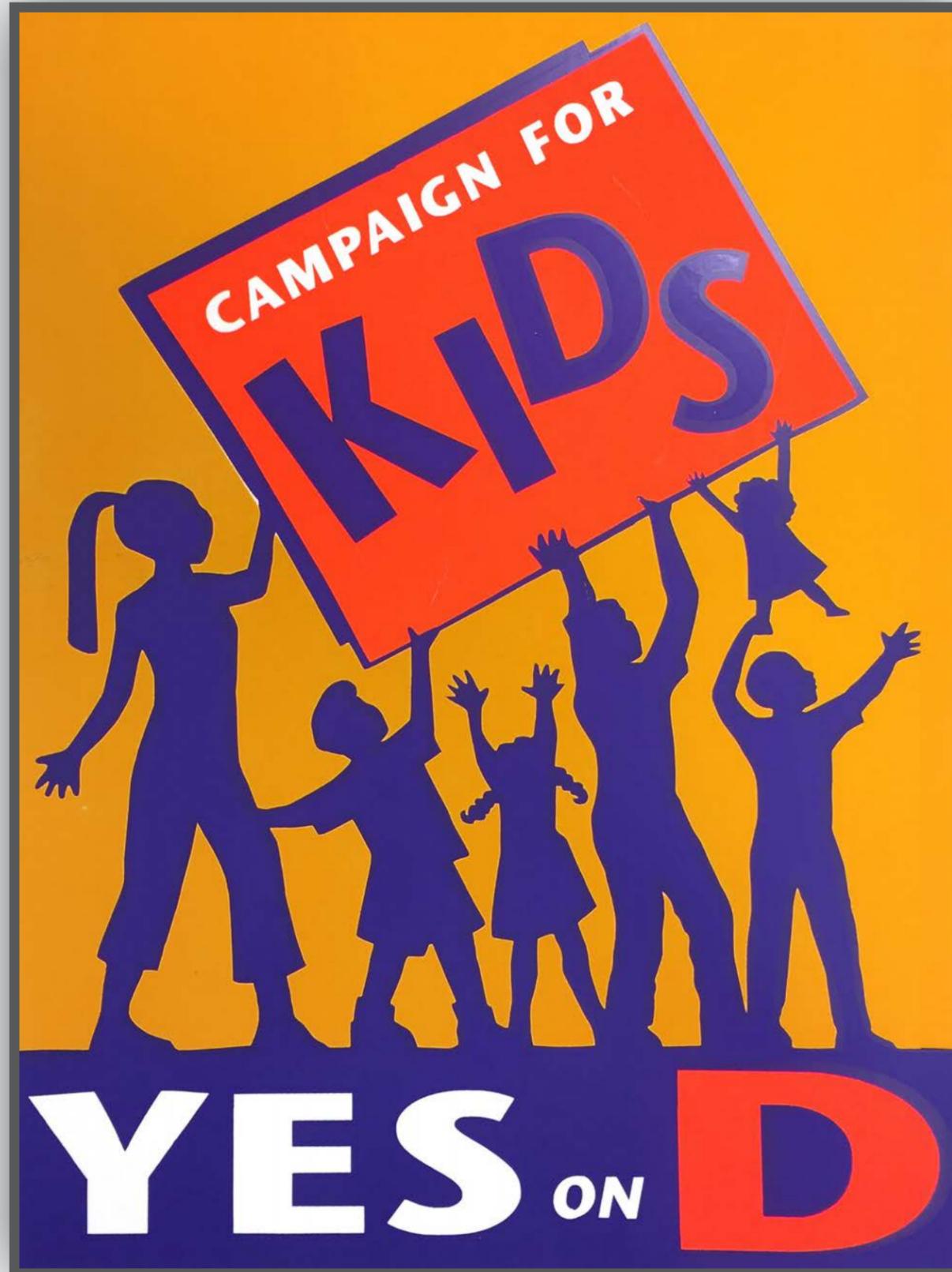


“During the 2014 campaign in San Francisco, there were literally years of political outreach and negotiation that occurred prior to moving forward with a ballot measure. Having a consensus measure that was supported by the Mayor and the entire Board of Supervisors was critical to securing the fund for 25 years!”

*Jason  
Campaign Manager, San Francisco*

# PART II

## Building Your Campaign



- 7 Your Win Number
- 8 Developing Your Message
- 9 Fundraising
- 10 Treasury and Compliance
- 11 Volunteer Recruitment
- 12 Endorsements



# 6

## Your Win Number

You know you need to earn votes to pass your measure, but how many does it takes to win? Your win number will inform your campaign’s strategies for voter contact, volunteer recruitment, communications/ media, and fundraising. Remember, some measures require two-thirds of voters’ support to pass the measure and some require a simple majority—be sure to know the rules pertaining to your specific measure.

You need to determine your win number and refer back to it constantly. Use this number as a way to prioritize your campaign actions. Everything you do should be focused on reaching that number.

The number one factor to consider when finding your win number is historical turnout. You can get this information from your local Elections Department or Office. Some cities and counties will have a city department dedicated to administering local elections, while others may have one clerk or individual. Regardless, you should get to know these people. They can be very helpful and you will need their help more than you think.

First, find your “**expected turnout**” by averaging the turnout percentage from each of the past three similar elections. To find the turnout percentage, take the total number of ballots cast on a similar measure – not the total number of people that voted for a candidate – and divide it by the total number of registered voters. You can obtain this information from your local election official’s office.

$$\text{Expected Turnout} = (\text{Year 1} + \text{Year 2} + \text{Year 3}) / 3$$

Your win number equals Expected Turnout multiplied by the current number of registered voters and the percentage of the vote required to win. If the measure is a simple majority requirement, then you will calculate 50% plus 1 vote.

$$\text{Win Number} = (\text{Expected Turnout} \times \text{Registered Voters}) \times 50\% + 1$$

If a measure requires two-thirds of votes cast, you will calculate 66.66% plus 1 vote.

$$\text{Win Number} = (\text{Expected Turnout} \times \text{Registered Voters}) \times 66.66\% + 1$$

### EXAMPLE:

Example: You are trying to determine the expected turnout in Alameda County in the November 2018 election. Start by going to the California Secretary of State’s website and search in the Elections Data for the “Voter Participation Statistics By County” report. Pull up the General Election Reports for 2014, 2010, 2006 – you will use these years (instead of Presidential election years) because they are most similar to 2018 in terms of what will be on the ballot. Look for the “Percent of Registered Voters” and you will find:

2014 = 45.04%

2010 = 61.17%

2008 = 61.23%

$$\text{Expected Turnout} = (45.04 + 61.17 + 61.23) / 3$$

$$\text{Expected Turnout} = 55.81\%$$

There are currently **888,664 registered voters in Alameda County**. Calculate your win number by multiplying the current number of registered voters by the expected turnout and the necessary vote threshold.

**Simple Majority Win Number =**

$$(888,664 \times .5581) \times 50\% + 1 =$$

**247,983 votes**

**Two-thirds Vote Win Number =**

$$(888,664 \times .5581) \times 66.66\% + 1 =$$

**330,611 votes**

Remember: Your win number is the assumed **minimum number of votes needed to win**. To be safe, you should always build in a 2-5% cushion to determine your vote goal.



### **BRAINSTORMING FOR YOUR CAMPAIGN:**

- If your measure is going to be on a June primary ballot, you must look at the last three June primary ballots and not the three most recent elections.
- Visit your local election official's website or office to find out how many voters are currently registered in your district and information on past election results.
- Is there another competitive measure or race on the ballot that will increase voter participation? Remember, we can expect higher turnout when a presidential candidate is at the top of the ballot versus midterms or other years.
- Are there any recent changes to the voting laws, such as registration or voter ID requirements? Changes to these laws can either increase turnout or depress the vote.
- When calculating your win number, always round up to 1 if you get a decimal in the final equation.

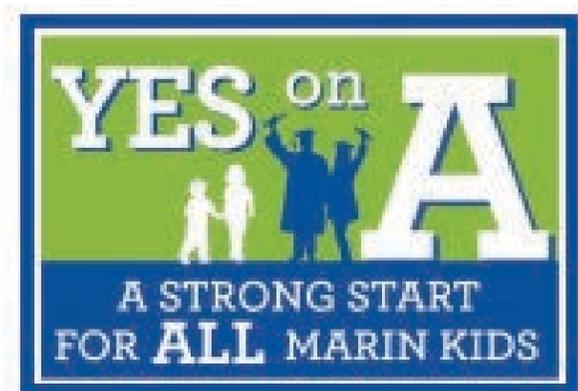
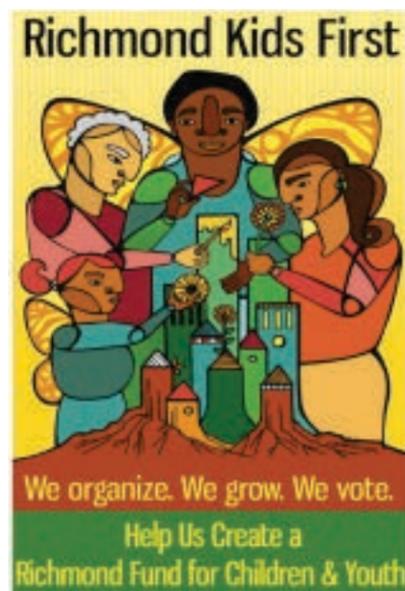


# 7 Developing Your Message

Your message conveys the values and vision of the campaign and is the core argument for your initiative. It answers the questions of *why*: why does it matter and why should voters care about your children's fund initiative. A good message will move people to support, donate, and volunteer for your cause. The campaign message is conveyed in a multitude of ways— your branding, paid communications, social media, news articles—and your campaign must be disciplined and consistent.

of your campaign. The best slogans and taglines are simple and straightforward. For example, take a look at the Richmond campaign poster. The campaign tagline “Richmond Kids First” is direct and simple but the slogan “We organize. We grow. We vote.” doesn't effectively convey what the campaign hopes to accomplish.

Alternatively, the Yes on A campaign in Marin County aimed to provide: access to quality preschool; comprehensive health care and wellness services; healthy nutrition; childcare and afterschool academic support. They chose the slogan “A strong start for ALL Marin kids” to immediately share what the campaign is hoping to accomplish.



Your campaign's core message isn't just a slogan, it's much more. Wellstone Action, a leading national political training organization, recommends following these guidelines when crafting your messaging strategy.

An effective message is:

**Credible** – it should be delivered by a credible messenger and the content should be backed up with facts or data supporting it

**Concise** – avoid jargon that would be hard for everyday people to understand

**Relevant** – your content should be timely and should be relevant in your community

**Compelling** – it needs to draw people in and keep their attention

**Contrasting** – offer a choice in the messaging and define the opposition

**Repeated** – consistency is key and remember to convey the same message over time and across media platforms

The steering committee should work together to develop the messaging strategy. Ideally, this is a guided conversation with the goal of drawing out the values behind your measure and identifying the arguments for and against your initiative. Many consultants are strategic messaging experts and can help the steering committee with this process.

## BRAINSTORMING FOR YOUR CAMPAIGN:

- What are you trying to communicate about your measure?
- What is the tone (uplifting, serious, sharp)?
- How would you position your measure on the political ideology spectrum (liberal, moderate, conservative)?
- Who would be credible messengers given your message, issues, and audience?

## SAMPLE CORE MESSAGE

Our children have the right to know their community will provide the services they need to thrive, yet too many have been left behind for too long. Together, we can make a commitment to every child's future. Our campaign will make early education and childcare more affordable for working families to give children a strong start. This initiative will fund organizations and programs that have been proven to work for educating young children and keeping them healthy. We must do everything we can to help kids at a critical period of brain development by investing in early education and childhood services because it will benefit the economy and workforce for years to come.



## Who are our targets?

Speaking generally, there is broad public support for investing more in children's services (a 2013 nationwide poll showed 70% of people support "doing more for children"). Based on polling we've conducted in California, we know our core supporters are women (especially mothers) over 45 years old. These groups are usually the most supportive demographic for the children's fund measures.

Be strategic about your messaging strategy for different audiences. Your target groups may have different priorities and perspectives and it will be your job to craft a compelling message that appeals to them. For example, In 2014 the San Francisco campaign focused on different messaging for the west side of the city which is traditionally more politically moderate than for the east side which is traditionally more progressive. The west side message focused on all the programs that would be delivered with no new taxes and the east side messages were focused more on the social benefits.

**TIP**  
Children are at the center of all of our work. They should be at the center of all your messaging!

## Message Box

A message box is a tool used by strategists to develop ways that you will communicate about yourself and your opposition. It will help you define a clear messaging landscape and assist with developing a clear contrast between your measure and the opposition.

US on US	THEM on THEM
<p><b>What we are saying about ourselves</b></p> <p><i>What are the reasons for the measure? Paint a picture of what the measure stands for or what you hope to accomplish.</i></p>	<p><b>What they are saying about themselves</b></p> <p><i>What does the opposition say about its position? What is their call to action?</i></p>
US on THEM	THEM on US
<p><b>What we are saying about them</b></p> <p><i>Define the opposition. What are we saying about them and their position?</i></p>	<p><b>What they are saying about us</b></p> <p><i>What does the opposition say about your measure? How will they frame our issue?</i></p>



# 8 Fundraising

There is no single solution to fundraising. This is the most important aspect to keep in mind as you begin to fundraise. Unlike many other types of campaigns, there are rarely interest groups that will benefit financially, and therefore fund a children's fund measure. There are no infrastructure contracts to award, and kids don't have any money. These challenges will make your campaign different from others.

The basics of good fundraising won't change though. In the coming months you will have to ask a lot of people for money in a lot of different ways, and you must ask over and over again. Fundraising demands a lot of time and your full commitment; it must be your top priority.

## Professional Support

As we lay out the approach for fundraising, you may be wondering, "I have to do all of that?" Conveniently, no! There are people who can help with this such as a fundraising director or fundraising consultant. You should leverage their expertise to help with assembling your fundraising plan, draft scripts for calls to potential donors, and manage other aspects of fundraising. If you do not have the resources to hire a fundraising director or fundraising consultant, you can consider, with support from your campaign team, managing your own fundraising operations.

Regardless of whether you are able to hire a fundraising director or consultant, you should plan to hire a firm to manage compliance. These firms will make sure that you follow all laws set by the local governing body for elections and that you file all of your contributions, each with the correct information, before every filing deadline.

## Rules for Fundraising

There are a few basic rules to follow for fundraising. First, you must know about and be prepared for each filing deadline. Campaigns are expected to file all of their contributions at specific points and must follow a number of laws and guidelines. Please see the Compliance section of this manual for more information.

We'll discuss this in more detail during the compliance section, but remember you cannot begin collecting contributions until you establish a committee and a bank account for the campaign. You cannot legally put campaign contributions into a personal account, even if you are just storing them until you open an account. A good rule of thumb is to establish your committee and open your bank account as early as possible so that you can begin fundraising earlier and have more time to do it.

While there are no individual contribution limits for ballot measures – anyone can donate as much as they would like – there are rules about who and what entities can donate. Be sure to do your research and understand who can legally contribute to your campaign.



### TIP

Passion is infectious – authenticity in the ask and the person asking is key to successful fundraising.



## How much do you need?

You'll need to raise enough money to cover your budget, as well as a buffer so that if the campaign goes over budget, you are not left in debt.

Raising a campaign out of debt is hard and in some cases, nearly impossible. You must work closely with each campaign team to make sure that the campaign is on track and will not overspend.

In the case of a ballot measure campaign, such as a local children's fund campaign, you should be prepared to raise at least \$125,000. While it may be possible to do it for slightly less than this, it would require a very large and very active volunteer base to make this possible. It is unlikely that you can properly run a children's fund campaign for less than \$125,000. At most, a very well funded campaign of this type in one of the biggest counties would be able to raise \$400,000. The raise amount will, of course, depend on the location of the campaign and whether there is an opposing campaign. A campaign in a larger and/or more populated municipality will cost more. Additionally, you'll need to raise more for a campaign with an opponent or opposing campaign than you will for a campaign running unopposed. However, don't assume that you'll need to raise significantly less if you're running unopposed. Based on the children's fund campaigns so far and the potential budgets we'll outline in Chapter 17: "Campaign Budget" beginning on page 103, we believe that you would struggle to run an effective campaign of any description for less than \$125,000.

## Analyzing your fundraising capacity

In order to analyze your fundraising capacity, you must first analyze your network, the networks of campaign team members and endorsing elected officials, and your community. You will need to build a database, where you will store all of this information and can track all calls you make; all contributions; all pledges to contribute; thank you notes; and more.

You should start by assembling the contacts of everyone you know that might support your campaign. You should also ask team members, and key friends and allies of the campaign to do the same with the contacts that they feel comfortable asking depending on what your needs are. These can be cell phone contacts; social media connections; email contacts; professional connections; holiday card lists; or circles of friends. Begin doing research about your community. Look for elected officials; clubs and organizations; companies and businesses; schools and afterschool programs; community leaders; and labor organizations and unions. You will need to identify key individuals and groups whose interests align with the campaign. You should also look at who has funded similar campaigns in the past. Later on, you will want to attend local and community events on behalf of the campaign to begin making those connections.

### PAST EXAMPLE

#### Sacramento 2016

In 2016, the Sacramento campaign raised almost \$210,000. In the end a vast majority of this money was raised from the marijuana industry, who were the subject of the tax. Industry supported the tax because they believed it would improve the image of the industry. This is a unique example but an excellent illustration of a campaign finding people or organizations who are likely to benefit from the measure and making them the focus of fundraising efforts.

Once you assemble this group of contacts, you should sort each contact or potential contact into one of four bucket areas:

#### PERSONAL CIRCLE

**WHO:**  
Family members, friends, and professional colleagues

**WHEN:**  
First

**MESSAGE:**  
You know me, and this is important

**EXAMPLES:**  
People directly connected to you and/or steering committee members

#### IDEOLOGY CIRCLE

**WHO:**  
People who share your causes or advocacy for a cause (e.g. staff and boards of children's agencies)

**WHEN:**  
Early

**MESSAGE:**  
Together we can make life much better for our kids and families

**EXAMPLES:**  
Childrens' CBOs, CBO Board members, Foundations, Education Unions

#### AXE-TO-GRIND CIRCLE

**WHO:**  
People who dislike and want to defeat your opponent

**WHEN:**  
Early, but need to show some viability first

**MESSAGE:**  
We can't rely on elected officials unless we the voters demand changes in the budget

#### POWER CIRCLE

**WHO:**  
People who want to protect or advance their political interests

**WHEN:**  
Late

**MESSAGE:**  
We're going to win (and when appropriate – your agency will get more funding).

**EXAMPLES:**  
Major donors of your political supporters

# Building a Fundraising Plan

Once you have assessed how much you need to raise and how much you are capable of raising, you are ready to begin assembling a fundraising plan. Remember, some fundraising directors and firms can assemble this for you, but you should play an active role in writing, reviewing, and approving the fundraising plan – you should also understand how and why fundraising plans are crafted, thus the reason for this section.

**A fundraising plan should answer the following questions<sup>1</sup>:**

1. How much do you need to raise?
2. How will you raise it?
3. When is it needed?
4. When will you raise it?
5. Where will you raise it?
6. Who will you raise it from?
7. What will it cost to raise it?

**Potential Donors**

- Family/Friends/Colleagues of you and steering committee
- CBO's
- CBO Board Members or Major financial supporters
- Education Unions
- Donors of your Political Supporters (you should ask for these)
- Foundations (particularly community foundations that have the most flexibility in political funding)
- Organizations that supported similar measures (School Bonds, similar tax measures)
- Teachers, school district employees or other education professionals

There are a few main ways to raise money, which include:

**Call time**

The most effective way to raise money is by calling people directly to ask

**Events/Fundraisers**

Combine high and low-dollar events so that everyone can be involved at a level they feel comfortable with and consider assembling host committees where hosts can invite donors from their own networks and can donate or raise to meet pre-set goals

**PACs**

Many corporations, labor unions, and local clubs have PACs and will contribute, if they endorse your campaign and get a follow-up call/letter asking for a contribution

**Bundlers/Finance Committee**

Trusted advisors that will raise money on behalf of the campaign, bundlers will often bundle contributions from a number of donors

**Online**

A combination of fundraising email blasts, which should be interspersed with non-fundraising email blasts to avoid burning your email list out, and social media posts or ads that drive people to fundraising pages; you should always work to build your email list through website and social media sign-ups and through event sign-in sheets

Determine how much you will raise through each of these channels, then determine timelines. You should consider building out timelines for the chunk of money you'll raise from each of these channels, as well as a timeline for your overall raise goal. Build your overall timeline around filing deadlines.

**“The majority of our money came from community foundations and a few small individual donors who contributed a good amount. Steering committee members were also required to reach fundraising goals.”**

*Jamileh  
Campaign Manager, Richmond*

## Potential Pitches

The most important thing to keep in mind while fundraising is that no one will give you money unless you ask. They might say no. Be prepared for some awkward conversations, but also be prepared to make some money.

**Whether in person or on the phone, you need to practice and perfect your ask. Use the following structure to increase your odds of getting a “yes”:**

1. **Introduction**
2. **Connection** – establish a rapport, make them feel connected to you
3. **Benefit** – why it matters to him/her, why it should be worth investing his/her hard-earned money in your campaign
4. **Direct Ask** – it must be specific and must include an amount
5. **WAIT** – go silent
6. **React** – depending on his/her response
7. **Thanks and follow-up**

**There are a few tricks to delivering a strong ask:**

1. **Pay attention to your pacing** – Speak slowly, it portrays confidence.
2. **You must have a concrete ask** – No one will give you money unless you ask. An example is “Can I count on you to contribute \$500 to our campaign?” or “Would you be able to make a contribution of \$250?”
3. **Remember tone** – If the tone of your voice drops at the end of the ask, making it a statement instead of a question, it is subtly commanding and makes it harder for people to say “no.”

**Don’t forget to listen and respond. For example:**

- “That’s too much” --> Negotiate
- “Not ready” --> Call back
- “Need more info” --> Provide it
- “NO” --> Why?



## Keep in Mind

1. It is really hard to ask people for money. It goes against most of our natural instincts. Be prepared for hard, awkward, and downright uncomfortable conversations. Stick with it, your commitment will pay off in the end.
2. No one will give anything unless they are asked. And even so, they will most likely give the bare minimum possible.
3. People want to feel a personal connection to the campaign/the issue. If they don't feel connected, they are not inclined to donate.
4. Early fundraising is critical. Some people will try to avoid donating until you qualify for the ballot. Be clear, **without financial supporters this may never get to the ballot.**
5. Be confident. It will be hard when people are saying no, but you believe in this campaign for a reason. Help people to understand those reasons.
6. Passion is infectious – authenticity in the ask and the person asking is key to successful fundraising.
7. This is more than a donation. It is an investment. People need to understand that their money will have an impact on their community and on other people's lives.
8. It is not rude to ask someone more than once. Sometimes people need more time or more information before they are ready to donate. Don't write these people off. Nurture these relationships until they are ready to invest.

## Exercises

### Practice writing a call-time script.

*You are the campaign manager. The School Board President is going to spend two hours in your office calling donors in her network.*

Create a script for her that includes the structure we discussed: an introduction, a connection, a description of the benefits, a direct ask, a space for silence, and potential responses to the variety of reactions she might get.

- Introduction
- Connection
- Description of the benefits
- Direct ask
- A space for silence
- Potential responses to the variety of reactions she might get

### Practice delivering the ask!

1. Find a partner.
2. Choose one person to be the School Board President who is making calls on behalf of the campaign, the other person is a potential donor.
3. Take 30 seconds to determine details.  
*If you are making the call, who do you represent?  
Why do you care about this ballot measure?  
If you are receiving the call, what is your current financial situation?  
What do you do for a living? Why should you care about this ballot measure?*
4. Practice your phone call. To the caller, practice delivering your ask and handling the response, whatever it may be. To the potential donor, don't say yes right away! Push the caller to really pitch to you.
5. Switch places and repeat

# 9

# Treasury and Compliance

**NOTE: THE FOLLOWING SECTION IS PREPARED FOR GENERAL INFORMATIONAL PURPOSES AND IS NOT INTENDED AS LEGAL ADVICE. IN ALL MATTERS, YOU ARE ADVISED TO SEEK THE ADVICE OF COUNSEL.**

Campaign finance and reporting is a highly regulated activity, comprising a complex and constantly evolving patchwork of various state and local laws. Noncompliance and other violations, no matter how minor, may be costly and detrimental to your campaign. You are strongly advised to consult and retain the support of trained political compliance and accounting professionals to assist you in navigating the registration and reporting requirements before engaging in any campaign activities.

This section will walk through the various steps for setting up your ballot measure campaign, what to expect for compliance reporting, and rules for third party organizations and nonprofits. The following information is intended as a reference and resource, but it should not replace the advice and counsel of a trained professional.



### TIPS

- List of Political Treasurers  
<http://cpta.info/directory/>
- List of Political Attorneys  
<http://www.cpaonline.com/members>

“I can’t stress enough the importance of finding a lawyer you can trust early in your campaign. This is critical, for getting the campaign moving, in the event of any legal action or reviewing FPPC reports.”

*Jamileh  
Campaign Manager, Richmond*

# Initial Setup of Local Ballot Measure Committee

Once you intend to start a campaign to support a ballot measure, you should form an independent entity (i.e. ballot measure committee) as a vehicle to conduct advocacy work. The committee would be subject to the registration, reporting, and disclosure requirements of the California Political Reform Act (“Act”). There is no set time you have to start your committee, but it must be open before you start raising money. Often campaigns will form a committee early so they can prove to doubters early that they can raise money.

## 1. Register your Committee

It is highly advisable to form a committee *before* you begin fundraising or engaging in campaign activities. Committees are often named in conjunction with the issue they are working on. This is especially helpful in the cases of ballot measure coalitions that would otherwise seem counterintuitive or not easily recognizable by the general voting population.

Once the committee raises (or spends) \$2,000 or more, the committee has *10 days* to file a “Statement of Organization” (**FPPC Form 410**)<sup>2</sup> form with the Secretary of State (“SoS”) and the applicable local filing authority. This will formally establish your committee.

- File the *original* Form 410 (with a wet signature) and a copy with the SOS – if the committee is formed primarily to support a single ballot measure (or two or more related ballot measures), be sure to classify the entity as a “primarily formed” committee in section 4 of the statement.<sup>4</sup>
- File a *copy* of the Form 410 with the local filing authority.<sup>3</sup> Be sure to obtain a date-stamped Form 410 from the filing office as proof of filing.

After the Form 410 is filed and approved, the SOS will issue a unique seven-digit identification number (FPPC ID#) that the committee must use on all subsequent filings.

*Note: You must amend the Form 410 whenever the pertinent information on the statement changes (e.g. upon raising \$2,000, changes to the committee name, committee status, principal officers, and/or bank account, etc.)*

### Useful tools on committee setup and legal issues.

<http://fundingthenextgeneration.org/nextgenwp/wp-content/uploads/2015/01/Ballot-Measure-Committee-Set-up-Instructions.pdf>

<http://fundingthenextgeneration.org/nextgenwp/wp-content/uploads/2015/01/Ballot-Measure-Cmte-Legal-Issues-2014.pdf>

## 2. Set up Tax Classification

Advocacy around ballot measures and initiatives are regulated as “lobbying” activities under current IRS regulations. To conduct in such activities, ballot measure committees are usually organized as unincorporated tax-exempt entities pursuant to Section 501(c) of the Internal Revenue Code.

- *Obtain a Federal Tax ID Number* – ballot measure committees should obtain an employer identification number from the IRS (“FEIN”) to allow the committee to open a bank account and conduct business. You can apply for an FEIN by filling out a Form SS-4<sup>5</sup> or visiting the IRS website.<sup>6</sup> *When applying for an FEIN, be sure to classify the legal structure of the organization as an “Other Nonprofit/Tax-Exempt Organization.”*
- *Declare Intent to Operate under Section 501(c)(4)* – IRS regulations require ballot measure committees to notify the IRS of its intent to operate as a Section 501(c) organization by filing Form 8976<sup>7</sup> within 60 days of formation.<sup>8</sup>

## 3. Open a Bank Account

It is important for the committee not to mix its campaign funds with any individual’s or organization’s funds. The committee should maintain a separate bank account to deposit and separate the money raised and spent on the campaign.<sup>9</sup> To open up a bank account, most banking institutions require the following:

- The FEIN letter from the IRS,
- A date-stamped Form 410, and
- In some cases, the SoS letter assigning the committee its FPPC ID number.



- The name you provide for the federal tax ID can change as needed, if for example you change your committee name to include the letter of your measure.
- In many counties the name of your campaign treasurer must appear on everything you produce. Consider asking someone with a good reputation in your community to act as Treasurer for your campaign.

# Reporting Obligations

Ballot measure committees are required to file periodic reports disclosing the contributions they receive and the money they spend. The committee should retain all records of contributions and expenses, including photocopies of checks and invoices received and/or issued by the committee, along with other original source documentation, such as bank statements, and other records reflecting account activity. While specific laws may vary between jurisdiction, it may also be necessary for your donors to report their activity separately. For more information about local requirements you should contact your local Department of Elections.

## What counts as a contribution?

- A contribution includes any monetary payments (including loans) and non-monetary payment (e.g. donated goods or services, and payments made by third parties for campaign services) received by the committee. Each type of contribution is reported differently. Consult the FPPC or an appropriate professional on specific reporting requirements.
- The committee must document and report the amounts and identities of each contributor (including their names, address, employer and occupation). Failure to disclose the true source of a contribution is considered one of the most serious violations of the Act.
- Donated goods or services count are considered non-monetary contributions (known as in-kind contributions). This could include food donations, promotional materials, meeting space, etc. The committee must document and report the value of any non-monetary contribution received as determined by the fair market value of the good or service. If the committee is unable to determine the value, a letter from the contributor stating the value of the good or service is sufficient.

## Pre-campaign Activity

While the obligation to begin reporting arises once the proposed legislation become a measure, nevertheless the committee must disclose those contributions and expenditures made before the proposal becomes a ballot measures. For organizations conducting fundraising operations, the committee must disclose the names of any contributors who knew or had reason to know that their contributions would be used to support the qualification or passage of a ballot measure.

## Contributions Generally

A contribution includes any monetary payments (including loans) and non-monetary payment (e.g. donated goods or services, and payments made by third parties for campaign services) received by the committee. Each type of contribution is reported differently. Please consult the FPPC or an appropriate professional on specific reporting requirements.

The committee must document and report the amounts and identities of each contributor (including their names, address, employer and occupation). Failure to disclose the true source of a contribution is considered one of the most serious violations of the Act.

## Intermediaries

Generally, campaign contributions should be directly deposited into the committee's bank account. However, if contributions are made through an intermediary,<sup>10</sup> the committee must report the required information for both the intermediary and the true contributors. This includes any contributions received by a nonprofit organization and channeled to the ballot measure committee.<sup>11</sup>

## Non-monetary Contributions

Donated goods or services count are considered non-monetary contributions. The committee must document and report the value of any non-monetary contribution received as determined by the fair market value of the good or service. If the committee is unable to determine the value, a letter from the contributor stating the value of the good or service is sufficient.

*Exception: Volunteer Personal Services – if an individual donates his/her personal or professional services to a campaign, no contribution has been made or received so long as there is no understanding of reimbursement.*

## Expenditures

Ballot measure committees are required to disclose all expenditures spent by the committee even if such expenditures occurred before the proposal became a measure. Additionally, the Act and the California Elections Code sets forth restrictions and permissible uses of campaign funds. Please consult the FPPC or a professional on the appropriate use of funds.

## Common Reports

For local ballot measure committees, these reports are generally filed with the local filing authority.

### FPPC Form 460

Campaign Disclosure Statement – Ballot measure committees are required to file Form 460<sup>12</sup> reports on a semi-annual and pre-election basis.<sup>13</sup> This report provides the public with a detailed overview of the committee's activities (including funds raised and spent) for the period specified.

### FPPC Form 497

#### 24-Hour Late Contribution Reports

Ballot measure committees are required to file Form 497<sup>14</sup> reports within 24 hours of receiving (or making) contributions totaling \$1,000 or more from a single source during the 90-day period before the election.

### Major Donor Notification

If the committee receives one or more contributions totaling \$5,000 or more in a calendar year from any individual or entity (that is not a recipient committee under the Act), the committee must send the contributor a written notice that they may have "major donor"<sup>15</sup> filing obligations. Such notices must be sent to the contributor within two weeks of receiving a contribution of \$5,000 or more (or one week if the contribution is \$10,000 or more and received within 90 days of Election Day).

## Nonprofits and Third Party Activities

Certain organizations (e.g. nonprofits) that contribute or spend money in connection with a ballot measure may be subject to additional registration and reporting requirements. Make sure the organizations you are collaborating with are aware of their reporting requirements under campaign finance, election, and tax laws. Below are some general guidelines, but Organizations' involved in the following activities are strongly encouraged to consult an elections attorney.

### Contributions of \$10,000 or more

If an organization (or individual) makes contributions or expenditures of \$10,000 or more in connection with your ballot measure, that organization would be considered a "major donor" and would be required to register with the SOS as a major donor committee and disclose their activity.<sup>16</sup>

### Contributions of \$50,000 or more

Any nonprofit organization<sup>17</sup> that makes political contributions or expenditures totaling more than \$50,000 in a calendar year (or more than \$100,000 in four consecutive calendar years) must register as a recipient committee and file campaign statements disclosing their political activities and the sources of funds (i.e. their donors) that were used for those activities.<sup>18</sup>

### Receiving Donations for the Purpose of Making Campaign Contributions or Expenditures

Organizations that solicit and receive contributions of \$2,000 or more in connection with a ballot measure campaign are required to register with the SOS, and disclose their donors as the sources of those funds. Specifically, this includes:

- Soliciting and receiving payments from donors for the purpose of making contributions or expenditures
- Accepting payments from donors with the agreement or understanding that all or a portion of the payment will be used for making contributions or expenditures
- Reaching a subsequent agreement with donors that any portion of existing funds will be used to make contributions or expenditures

### Nonprofits are allowed to do political work!

There is a misconception that nonprofits can not do political work – this is not true. Nonprofits can't be partisan in their politics. There are distinctions between advocacy and lobbying. The IRS sets limits on the amount of lobbying some nonprofits can engage in (less than 20% of their work). More information on this is available in the Funding the Next Generation manual "Creating Dedicated Funding Streams for Children's Services" or from the Alliance for Justice at

[www.bolderadvocacy.org/wp-content/uploads/2014/08/Californias\\_ballot\\_measure\\_disclosure\\_and\\_nonprofits.pdf](http://www.bolderadvocacy.org/wp-content/uploads/2014/08/Californias_ballot_measure_disclosure_and_nonprofits.pdf) .

We've also included some information in the appendix to help nonprofits clarify what constitutes lobbying and what does not.

Many people, including both lawyers and accountants for nonprofits, do not fully understand the extent to which nonprofits can engage in non-partisan political activity. In two counties in California nonprofits were misinformed by their lawyers and accountants about this important issue.

## PAST EXAMPLE

### San Francisco 1991

During the first children's fund campaign, Coleman Advocates for Children and Youth emptied its bank account to make a \$50,000 donation to the campaign. It was well within the law, and reflected the deep commitment of the organization to the need for a sustainable funding stream for children's services. Since 1991, the Fund has resulted in almost one billion dollars to fund children's services. Clearly the initial campaign investment paid off for San Francisco's children.

### Sponsor Organizations

If any organization (or person) contributes 80 percent or more of the committee's funds, collects contributions for the committee from its membership dues, provides all or nearly all of the administrative services for the committee, or sets the policies on how the committee raises or spends its funds – such organization is considered a "sponsor" of the ballot measure committee.

Sponsor organizations must be identified in the ballot measure committee's name on the Form 410, and may be subject to additional registration and reporting requirements as a separate committee. However, a sponsor organization that has a membership base is not required to register as a separate committee so long as the organization does not make or receive payments in excess of \$10,000 in connection with the ballot measure (such organizations are permitted to report their activities on their sponsored committee's campaign statements).

### Tax Implications for 501(c)(3) Organizations

In general, Section 501(c)(3) organizations are permitted to make contributions to ballot measure committees. However, 501(c)(3) organization risk losing their tax-exempt status if a substantial part of its activities are dedicated to attempting to influence legislation (i.e. lobbying). Contributions to ballot measure committees by (c)(3) organizations must be included in its lobbying calculations for purposes of determining whether a substantial part of its activities consist of attempting to influence legislation.<sup>19</sup> Consider engaging an election attorney if your campaign is receiving help from a 501(c)(3) organization.

### Employee Time

The employer has made a nonmonetary contribution to the committee if an employee spends more than 10 percent of his or her compensated time in a calendar month performing campaign activities. The amount of the non-monetary contribution is determined by the following equation:

$$\frac{\text{Compensated Time spent on Campaign}}{\text{Total Compensated Time}} \times \text{Gross Compensation} = \text{Nonmonetary Contribution}$$

*Note: Gross compensation includes wages paid and any wage equivalents (such as stock options).*

### Internal Newsletters

An organizations may advocate on behalf of a ballot measure in its regularly published newsletters, as long as its circulation is limited to its members and is distributed in the same style and manner as done previously. The costs and payments associated with such communications would not count towards the \$2,000 registration threshold.

# 10 Volunteer Recruitment



Developing a volunteer base gives you the opportunity to **build real community power and create a network of grassroots activists fighting for children's issues in your community.**

Volunteers are the backbone of your campaign. All campaigns must determine how and where you will find volunteers; how you get them in the door to help; what actions will you have them take; and, how do you keep them coming back?

Your volunteer recruitment program should be a strategic plan of action that uses available direct contact tools and tactics. It is how you will create a solid base of support that pure media campaigns lack. This is the opportunity to empower real people from the community in your campaign and give them the tools they need to make a difference. Build off the growing momentum for children's fund campaigns with the goal of creating sustainable coalition that will be in place for years to come.

## Where to Start

You need to target the most favorable groups of people. Start by identifying individuals who stand to benefit from this initiative—such as children's service organizations.

Cast a wide net and develop a list of all of the potentially supportive organizations, groups, and individuals in your area. Think about service providers, educators, parents, students, etc. Who cares about your initiative, and who could be helpful?

It is also helpful to understand the local political environment and align your campaign with other people who are doing this work. For example, the groups involved in planning the resistance actions (Our Revolution, Town Hall Project, etc) across the country are tapping into a reservoir of political action and could be a huge opportunity for you to meet people who would care about your issue also.

Before you begin outreach, find an efficient way to gather and organize contact information (phone numbers and emails). You will also need to determine what action you want your volunteers to take and when.

### PAST EXAMPLE

#### Solano 2016

The Building Trades had a representative on the Steering Committee, and that resulted in considerable volunteer help with tasks that required heavy lifting, such a putting up and taking down large signs along the highways.



## Canvassing

Meeting voters by knocking on their doors and having face-to-face conversations; identifying them as supportive, opposed, or undecided; distributing literature, yard signs and bumper stickers; knocking on doors on Election Day to urge people to vote. This is the most effective way to identify supporters and to persuade voters to support the measure. Remember, canvassing requires extensive walking, so your volunteers will need to be healthy enough to walk for 2-3 hours.



## Phone banking

Calling voters using the voter file data to identify supporters and recruit volunteers. If a volunteer is unable to walk door to door, perhaps he or she will be willing to make phone calls.



## Write postcards

Writing personalized postcards to people in their network (think friends, family, club members, co-workers, business associates, etc) to ask them to support the measure. The card and postage can be supplied by the campaign, but volunteers should write personalized messages to each person. Postcards are also a way to share the stories of your campaign. A powerful example would be to send a postcard from a homeless student to potential voters explaining the ways this measure would impact their life.



## Put up a yard sign

Most neighborhoods allow homeowners to put up yard signs, which are often useful indicators of grassroots support. This is an easy thing for a volunteers to agree to do. You can also ask them to recruit neighbors for yard signs, too.



## Organize a house party

A good way to meet voters is to have volunteers sponsor functions in their homes. From these get-togethers, you can often recruit new volunteers. This could look like a one-hour coffee/breakfast meeting or a larger and longer cocktail reception. Some supporters will often want to do more, offering to throw lavish shindigs with flowing drink and plentiful food. You should avoid paying for social gatherings like house parties from the campaign budget. Get people to donate food and drinks and have them fill out an in-kind contribution form. (Always make sure you check applicable laws on contribution reporting and limitations as they relate to in-kind donations.)



## Collect money

Ask your volunteers to help raise money for the campaign by making phone calls or e-mails to their family and friends. Sometimes a volunteer can turn a house party into a fundraiser. Perhaps it will be a low-dollar, \$25 per person gathering or a \$200 per person cocktail soiree, whatever fits the audience. If your supporter has good contacts, and approaches friends and associates the right way, this would also be a way to engage many new, untapped donors



## Create a neighborhood campaign center

If your campaign covers large geographical areas, you can ask volunteers to turn their houses (or at least a room, garage, storage unit or closet) into a phone bank room or depot for distribution of campaign materials (signs, literature, and stickers).



## Attend rallies and public meetings

Often in campaigns, you need a large collection of people as a show of force. Volunteers can be extremely helpful here. Whether it's populating a fundraiser, a town hall meeting, a press event or a rally, they can be your best pool from which to draw a crowd.



## Comment on blogs, radio talk shows, and newspaper forums

Ask volunteers to carry the message of your campaign to public forums.



## TIP

To get young people involved in your campaign, make volunteer events and activities fun and social. Host a high school canvass launch, turn a phone bank into a pizza party, or create a fun competition for the number of calls made or doors knocked! (This strategy also works for adults too!)

“The Local Democratic Party was very helpful in providing volunteer space for phone banking and provided doorhangers.”

*Kathy  
Campaign Manager, Marin*

## Planning Recruitment

When doing volunteer recruitment, make sure you’re asking the right people for the right things and planning enough time to recruit as many volunteers as you’ll need.

**Phone banking and canvassing can have a significant impact on voter turnout, so this should be your first ask when recruiting volunteers.** However, you may have people who are not comfortable making calls or knocking on doors at first. Give them something else to do initially, and try to escalate their activity over time.

When you are recruiting for a phone bank or canvass, count your volunteer needs in shifts – *not people*. For example, if your goal is to knock on 500 doors next weekend, let’s determine how many shifts you need to recruit using the following matrix:

Tactic	Calls Made/Doors Knocked Per Hour	Per 3 Hour Shift
Canvassing	20	60
Phonebanking	30	90

Volunteer shifts are usually three hours long, so we can assume that 60 doors would get knocked in one shift. Therefore, you will need to complete 9 shifts to knock on 500 doors.

### ★ TIPS

- Count your volunteer capacity needs in “shifts” not people, because one person may do more than one shift or action.
- Always assume a 50% flake rate at your volunteer events. People will cancel on you at the last minute or just not show up. This means your recruitment goal should be 18 shifts for the upcoming weekend.

### PAST EXAMPLE

#### San Francisco 2014

The San Francisco campaign in 2014 had an advisory committee with more than 30 organizations from across the city that worked with children and young people. Throughout the campaign these organizations mobilized hundreds of young people to canvass, table, attend rallies and put up signs. This was both possible and powerful since for the first time young people aged 18-24 were included in the fund.



## Making the Ask

Organizing is all about asking. We ask people for their vote, their money, and their time, among other things. Mastering your ask is important to running a good campaign. As they say, you get some of what you ask for and none of what you don't.

**Follow these guidelines to deliver an effective ask:**

### It's Personal

An effective ask is personal. It is connected with what a person cares about – the issues that are important to them, or their values, or their interest – why the issue matters to them. We want to be explicit about what skills, talents or attributes this person brings to the campaign. It's flattering and meaningful to a person if you are thoughtful about the specific ways they can make a difference.

Take a high school student for example. She wants to get involved in local politics and has told you she cares about improving public school programs and intervention services. She is available to help out about 10 hours/week. A good ask for her would be to come help recruit and coordinate other volunteers. Explain that her passion for this issue is contagious and that it will easily draw people into the campaign. This opportunity will also be a good learning opportunity and provide valuable experience for her.

### It's Connected to Need

A good ask is not just meaningful to the person being asked, but meaningful to your campaign. You must articulate how the person can contribute to your campaign and how that fits with your overall strategy. There are a LOT of things that need to happen to make your campaign successful, and it is critical to be thoughtful about what you need volunteers to be doing—and how that will move your campaign forward.

For example, we would explain to the same high school student how volunteer recruitment helps grow our capacity and increase our impact. The point is to help her see how even seemingly small tasks like phone banking can make a large impact in the campaign. See the "Opportunities for Volunteers" section for more examples on how volunteers will support your campaign.

### It's Specific

Be clear about exactly what your ask entails. What is the actual commitment of time? What are the specific things that they would be required to help you with? An effective ask is really specific about details. Before making your ask, make sure you understand what you need and when you need it. An effective ask is really specific about details of the action and it asks people to give you a yes or no answer – "Can I count on you" forces them to respond.

Instead of asking the high school student to "sign up to volunteer" or "to make phone calls" ask her to "meet you on Tuesday at 5 pm at the local coffee shop to help with phone banking to recruit other volunteers for your weekend canvass." The specific details in this ask make it much stronger and it makes it easier for her to say yes.



## BRAINSTORMING FOR YOUR CAMPAIGN:

- Who are 10 people or organizations that would fall within your "Support Universe"?
- What roles do you have for volunteers to play now?
- What are some other creative ways for you to engage your volunteers?



Especially in lower profile local elections, endorsements are critical. While most people see a lot of information about Presidential or Gubernatorial elections, they are less likely to know about local ballot measures. If people don't understand the details of something that is on the ballot they will look to the organizations or candidates that they support to provide information about how they should vote. You will want as many of these organizations and candidates as possible to recommend and evangelize your ballot measure to voters. This section will explore how you build an endorsement plan, who to seek endorsements from, and the process for securing different types of endorsements.

Endorsements are generally split into three categories: individual, organizational and media. The process is different for each type of endorsement and will often occur at different times in the campaign, so we'll explore them separately.

### Where to look for endorsements

Here are some examples of people who could make strong endorsers for your measure:

- Law Enforcement leaders – Often local Chiefs of Police will say positive things about crime prevention
- Leading Pediatricians – A well respected group when it comes to children's issues
- Labor leaders – Talking about future workforce
- Celebrity Endorsers – High profile people in your community who are supportive of the issue
- Pastors/Ministers – Excellent profile, and have a large reach
- PTA – Excellent brand. Who knows more about what kids need than parents?
- Health Organizations

**"I wish someone would have told us to talk to our local unions. We should have spoken to them before we started drafting the ballot language. We would have been on the ballot if we had their support."**

*Jamileh  
Campaign Manager, Richmond*

## Early Endorsements

Early endorsements can really help get some momentum behind your campaign. Here is a partial early endorsers list from Marin in 2016:

### LIST OF EARLY ENDORSEMENTS

**Jenny Callaway**, Expenditure Committee Chairperson, Former Trustee, San Rafael City Schools, MarinKids

**Mary Jane Burke**, Marin County Superintendent of Schools

**Liz Burns**, Community Action Marin

**Mike Daly**, Chief Probation Officer, Marin County

**Aideen Gaidmore**, Marin Child Care Council

**Carlos Garcia-Bedoya**, PhD, Parent Voices

**Cynthia Murray**, North Bay Leadership Council

**Pat Kendall**, San Rafael Citizen of the Year, 2013

**Heather Ravani**, Marin County Health and Human Services

**Amy Reisch**, First 5 Marin

**Curtis Robinson**, MD, Marin Community Foundation, Marin County Board of Education

**Juan Rodriguez**, Principal, Venetia Valley K-8, First 5 Marin

#### Organizations

**Canal Youth & Family Council**

**Community Action Marin**

**First 5 Marin**

**Hispanic Chamber of Commerce of Marin**

**Latino Council**

**League of Women Voters of Marin County**

**Marin Child Care Commission**

**Marin Child Care Council**

**MarinKids**

#### Parent Voices

**United Way of the Bay Area**

**Youth Leadership Institute**

**Margaret Ballou**, Women's Commission

**Barrie Becker**, Youth Safety Partners

**Christa Brown**, United Way of the Bay Area

**Maribeth Bushey**, San Rafael City Council

**CJ Callen**, Youth Leadership Institute

**Susan Christman**, Trustee, Larkspur-Corte Madera Unified School District

**Pepe Gonzalez**, Principal, Laurel Dell, Board of Directors, 10,000 Degrees

**Shalee Cunningham**, Superintendent, Novato Unified School District

**Peggy Dodge**, College of Marin, Early Childhood Education

**Michelle Fadelli**, First 5 Marin, MarinKids

**Patty Garbarino**, Marin County Board of Education, San Rafael Chamber of Commerce

**Susan Gilmore**, North Bay Children's Center

**Marcia Hagan**, League of Women Voters

**Liz Hall**, Marin Organizing Committee

**Sara Jones**, Director, Marin County Free Library

**Dana King**, Chair, MarinKids

**Laura Llerena**, Marin Organizing Committee

**Jonathan Logan**, Marin City Community Services District

**Sally Matsuishi**, Next Generation Scholars

**Sheri Mowbry**, Trustee, Tamalpais Union High School District

**Laurie O'Hara**, Board of Directors, Canal Welcome Center

**Cheryl Paddack**, Novato Youth Center

**Bonny White**, Marin County Free Library

**Tom Popenuck**, SEIU

**Olga 'Jade' Prospero**, Parent Voices

**Bob Rosenberg**, Marin County School Volunteers

**Marian Schinske**, NovatoSpirit

**Deborah Schoenbaum**, Youth Leadership Institute

**Maureen Sedonaen**, Goodwill SF-Marin-San Mateo, Youth Leadership Institute

**Marianne Slattery**, Marin Head Start

**Sparkie Spaeth**, Marin County Health and Human Services

**Susan T Sutton**

**Kathleen Tabor**, MarinKids

**Heather Tadlock**, Parent Voices

**Gail Theller**, Community Action Marin

**Dr. Shirley Thornton**, Sausalito Marin City School District

**Sharon Turner**, Marin City Youth

**Christina Warren**, UC Berkeley

**Mike Watenpaugh**, Superintendent, San Rafael City Schools

**Cecilia Zamora**, Hispanic Chamber of Commerce

**Eric Lucan**, Novato City Council

\*Organizations not in bold listed for identification purposes only

## Individual Endorsements

You'll gain most of your individual endorsements through political networking. As soon as your measure has qualified for the ballot, representatives of your campaign should meet with any elected officials that are not yet supporting your campaign. Polling can be very important for this process, politicians love to know what the public thinks about a measure before they support it. You should think about what information you can provide out of your poll to help garner their support.

The pitch in every individual endorsement meeting is different, but you should be looking for ways to highlight why your measure, or their endorsement of your measure, will help them. What else can you offer that is going to help both of you? For example, you could offer to feature them in mail or another type of paid communications. This would benefit you from having a high profile supporter that voters recognize on your mail, and they would benefit from the increased exposure.

Don't just try to get endorsements from your traditional supporter base. It is important to secure broad support across the ideological spectrum. An endorsement from a someone outside your base might actually be worth more votes on Election Day, even if it is harder to secure.

Sometimes, with important endorsements (such as a respected elected official), the process of obtaining an endorsement will take time – maybe multiple meetings, maybe with a group with connections to the official, and it could involve a visit to a children's program to bring home the argument.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- Who are the top 10 elected office holders in your city?
- Who are another 5 high profile people (local celebrity, civic leader, etc.) that would help your measure succeed?
- What relationships do you already have that could help you secure an endorsement?



### TIPS

- You don't have to be qualified for the ballot to get an endorsement. As you identify supporters in the early stages of building your measure, ask them for an early endorsement!
- When you receive a verbal endorsement from an individual you should get them to sign a statement that certifies he or she or their organization has endorsed your campaign and are happy for you to use their name on materials. This will save a lot of headaches later!

## Solano 2016

### List of Endorsements

#### Individuals

Congressman Mike Thompson  
Senator Lois Wolk  
Assemblyman Bill Dodd  
Assemblyman Jim Frazier  
Mariko Yamada, former State Assemblywoman  
Erin Hannigan, Chairwoman, Solano County Board of Supervisors (District 1)  
Linda Seifert, Solano County Supervisor  
Skip Thompson, Solano County Supervisor  
John Vasquez, Solano County Supervisor  
Jay Speck, Solano County Superintendent of Schools  
Elizabeth Patterson, Mayor of Benicia  
Harry Price, Mayor of Fairfield  
Osby Davis, Mayor of Vallejo  
Lori Wilson, Mayor Pro tem, Suisun  
Dr. Rozanna Verder-Aliga, Vice Mayor, Vallejo  
Katy Meissner, Member, Vallejo City Council  
Bob Sampayan, Member, Vallejo City Council  
Barbara Kondylis, former Member, Solano County Board of Supervisors (District 1)  
Tony Intintoli, former Mayor of Vallejo  
Mike Ioakimedes, former Member, Benicia City Council  
Kathy Hoffman, former Member, Vallejo City Council  
Rebecca Billing, former Benicia School Board Member  
Bill Pendergast, former Vallejo School Board Member  
Elise Crane, Commissioner, First 5 Solano Children and Families Commission & City of Vacaville Planning Commission  
Monica Brown, Solano Community College Trustee  
Pam Keith, Solano Community College Trustee  
Liat Meitzenheimer, Vallejo Parks & Recreation Board of Directors  
Landis Graden, Vallejo Planning Commission Chair

#### Organizations

Children's Defense Fund – California  
Children's Network of Solano County  
City Council of Benicia  
Common Ground  
Congregation B'nai Israel  
Dixon Family Services  
Fairfield – Suisun Chamber of Commerce  
Emmanuel Arms Community, Inc.  
Fighting Back Partnership  
First 5 Solano  
Napa Solano Building and Construction Trades Council, AFL-CIO  
Napa-Solano Central Labor Council  
Iron Workers Union, Local 378  
Solano Children's Alliance  
Solano Coalition for Better Health  
Solano County Young Democrats  
Solano County Board of Education  
Solano Democratic Central Committee  
Solano Family and Children's Services  
Stonewall Democratic Club  
United Democrats of Solano County  
United Way of the Bay Area  
Vacaville Teachers Association

PAST EXAMPLE

## Organizational Endorsements

While most individual endorsements can be secured at any time, endorsing organizations have a formal process and a set timeframe for endorsing. The specific rules and format will differ between organizations, but the process for most of them is similar.

There will be some organizations that are connected to your campaign, like children's services agencies that will endorse you early. These will be some of the most important endorsements you receive. These will be organizations that were involved in getting the measure off the ground, or ones which will directly benefit from the measure. You should actively encourage early endorsements as they can have a snowball effect; each one you secure helps you secure more.

Once all the items on the election ballot have been finalized, most endorsing organizations will set meetings for campaigns to come and present their case for an endorsement to a board of directors, group of leaders, or collection of members within the organization. Finding the right person to speak to each of these can be this difference between success and failure. A person that is compelling to a youth group will not be the same as your local chamber of commerce. Try to find the best fit from within your network to attend each of these endorsement meetings. These meetings generally follow a similar format. Both supporters and opponents of each measure will make their pitch to the membership or board, there will be a short Q&A session, and then qualifying members will vote. Most of the time, the people in the meetings will only spend 10 or 15 minutes discussing your ballot measure as they will have a lot of other issues to discuss at that meeting

For important endorsements, such as major political parties you should use your network to lobby members before their endorsement meeting to increase the support you have during the voting process. Keep in mind that many elected officials are also members of organizations that endorse. Where possible you should also seek their support in lobbying members.



### TIP

Endorsement meetings are as much about public speaking as they are about knowledge of the measure. You need the right mix of expertise and public speaking skills. It is important to make sure you have a group of people who are well trained in public speaking and have a strong understanding of your measure. You should organize a training for these representatives before major endorsements start (about 3 months before the election).

## Media Endorsements

Some of the most important endorsements will be those of the major media in your community. Preparing for an endorsement meeting with the media requires preparation and strategy. This includes learning ahead of time who will be at the meeting and understanding their interests and points of view. You should also be very familiar with past positions of the media organization, most likely a newspaper, and be prepared with arguments that address their general concerns. An important meeting like this should be attended by more than one person – several people who can speak to different aspects of the issue as well as represent different types of stakeholders. You should have a planning meeting ahead of time, and your initial presentation should be well-orchestrated and thoroughly practiced.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- On top of organizations that have already pledged support from your support community, what are 10 other organizations who you'd like to endorse your measure?
- Who are the 5 highest profile elected officials you'd most like to support your campaign?



- 13 Press and Media Relations
- 14 Paid Communications
- 15 Digital
- 16 Direct Voter Contact



There has been a substantial shift in how people consume their news over the past two decades. However, local news outlets remain one of the most trusted sources for local election information.

Having the support of your local paper, and getting positive stories in local media can make a real difference in the outcome of your campaign. Put simply, media matters.

Throughout the course of your campaign there will be limited chances to earn the attention of the press. In order to maximize these opportunities, you must be realistic about what you can achieve. It is likely that you will only get a couple of stories written about your campaign. Making sure they are the right stories could make a big difference in how the public views your initiative.

### Build a Relationship with Reporters

Most local media outlets will allocate a journalist to your campaign or to the issue area. Establishing a relationship with this reporter is a smart way to influence what gets covered. Start by asking them to get coffee with you to have an introductory conversation about the measure. The goal is to get to know them and to offer yourself as a resource to help them. If they can't meet in person, then ask to do a phone call.

Once you have built a relationship with them, journalists will likely be more receptive to positive stories about your campaign. Alternatively, if your opposition is trying to pitch a negative story about your measure, the journalist will likely come to you directly for a response before they publish anything. Members of your steering committee might already have these relationships, so don't be afraid to leverage them to benefit the campaign. Building a strong collaborative relationship with local journalists early will benefit your campaign in the long run.

## Leveraging Major Campaign Milestones

You will have limited opportunities for positive stories. This makes it important to maximize the few opportunities you do get. Be prepared to have a plan to notify and engage with the press around major campaign milestones, such as the date you qualify for the ballot, your official campaign launch, or a big volunteer event with local children.

### Ballot Qualification

This is a big milestone for any campaign. After months (or years) of work, you can now be certain people will vote on your measure come Election Day. There might be less fanfare if you got it on the ballot legislatively instead of through signature collection, but you should use this moment to celebrate with your supporters and use it as an opportunity to get positive press.

At this point, most people probably aren't aware of your measure. Think about what you want them to know. Your perfect headline might be something like "Historic Fund for Local Children Qualifies for Ballot". What could the story look like? A good pitch would be a story of a young family who's going to get access to childcare or some school kids that are going to get access to after school programs. Think about how you can tell the story of your measure through an event or images which will provide context for the local press.

Think about how you can incorporate children into your qualification announcement. One of the most iconic images of the first children's fund campaign in San Francisco was of children pulling little red wagons filled with petitions to City Hall. These images became a symbol for the whole campaign!

### Campaign Launch

Prepare a press strategy for your public campaign launch. If you're holding a public event or press conference, send a press release and invite reporters to attend. This could be a great opportunity for positive press and offer an ideal photo opportunity. Ask the reporters if they would like quotes from community members and leaders and prepare a couple of supporters to speak to the press. Keep in mind these people should be local and be able to speak with authenticity about why they support the measure.

Visuals are important to a successful launch event. In short, you want kids, lots of kids, in a setting that people associate with children such as a school or childcare center. As you are planning your launch you should also think about the photo you want people to see and do not be afraid to use props such as balloons, signs or toys.

If you do not hold a public event, consider placing an op-ed in the local paper or pitching a story to local morning news announcing your campaign. In both of these instances you will want to involve a local spokesperson. It's best if you have someone that people will recognize (i.e. the Mayor, school administrator, local community leader).

### Volunteer Mobilizations

Imagine you're a few weeks away from Election Day and one of your steering committee members, a local basketball coach, has organized 50 young basketball players to go door to door in their uniforms to talk to voters. This is a perfect opportunity to pitch a story to the local paper and news station. These images are tailor made for local media. Events such as this will convey excitement about your campaign and will show the reader how hard your campaign is working to get the word out. Other volunteer mobilization opportunities you could pitch to reporters are volunteer-led phone banks or trainings.

### Other Opportunities

Most likely press coverage of your campaign will be sparse, but always keep on the lookout for opportunities to get coverage for your campaign. Some other examples of this are major (or celebrity) endorsements and large supporter rallies.



Always have children involved in your media events!

### PAST EXAMPLE

#### Napa 2016

The 2016 campaign in Napa provides an excellent example of how much you can gain based on relationships with local journalists. The Campaign Manager for the Yes on Measure Y campaign leveraged her existing relationship with a local journalist to secure positive coverage in the major local paper the Napa Valley Register. The article reported favorably on the Yes on Y campaign launch, provided almost none of the negatives associated with the measure and contained numerous positive quotes from campaign supporters.

## Preparing for a Media Event

There are several types of media events: press breakfasts, luncheons, press conferences, or public demonstrations. If you are sharing breaking news, it's best to do a press conference or public demonstration. When planning your event, be sure to consider the limitations of the daily news cycle and time your media event accordingly.

Your campaign manager should oversee this process but you should prepare the following for any event you want the press to attend and cover:

### Prepare Press Advisory

This should be sent two days before your event. Include a brief description of the event and all the logistical information the media will need (who, what, where, when, etc). Send the advisory to every media outlet in your district. A best practice is to send it once more the night before or the morning of the event as a reminder. Make sure to include a contact name a phone number for more information.

### Make Calls to Key Media Outlets

Who are the reporters you would like to cover the event? Call them directly to ask them to attend.

### Draft Press Release

A press release is a short, exciting, description of your event. It should be no more than one page and include everything people need to know about your event. Think of it as a tool for a journalist to use as the starting point for his or her story and include quotes from campaign spokespeople and supporters. Make sure to include a contact name a phone number for more information, and send it to every media organization in your region.

## TIPS

- Reporters work on deadlines. Be sure to respond to their calls or emails ASAP otherwise you may lose your chance to answer their questions or contribute to their story.
- Consider your budget and available resources when planning a media event. Are you able to provide basic materials and supplies (podium, mic, signs, bottled water, etc)?
- If your media event is outside, make sure you check whether you need to obtain city use permits for public spaces or sidewalks.
- Hold your event at an agency or center which will be funded by your measure.
- Make sure to include as many adorable children as you can.



## BRAINSTORMING FOR YOUR CAMPAIGN:

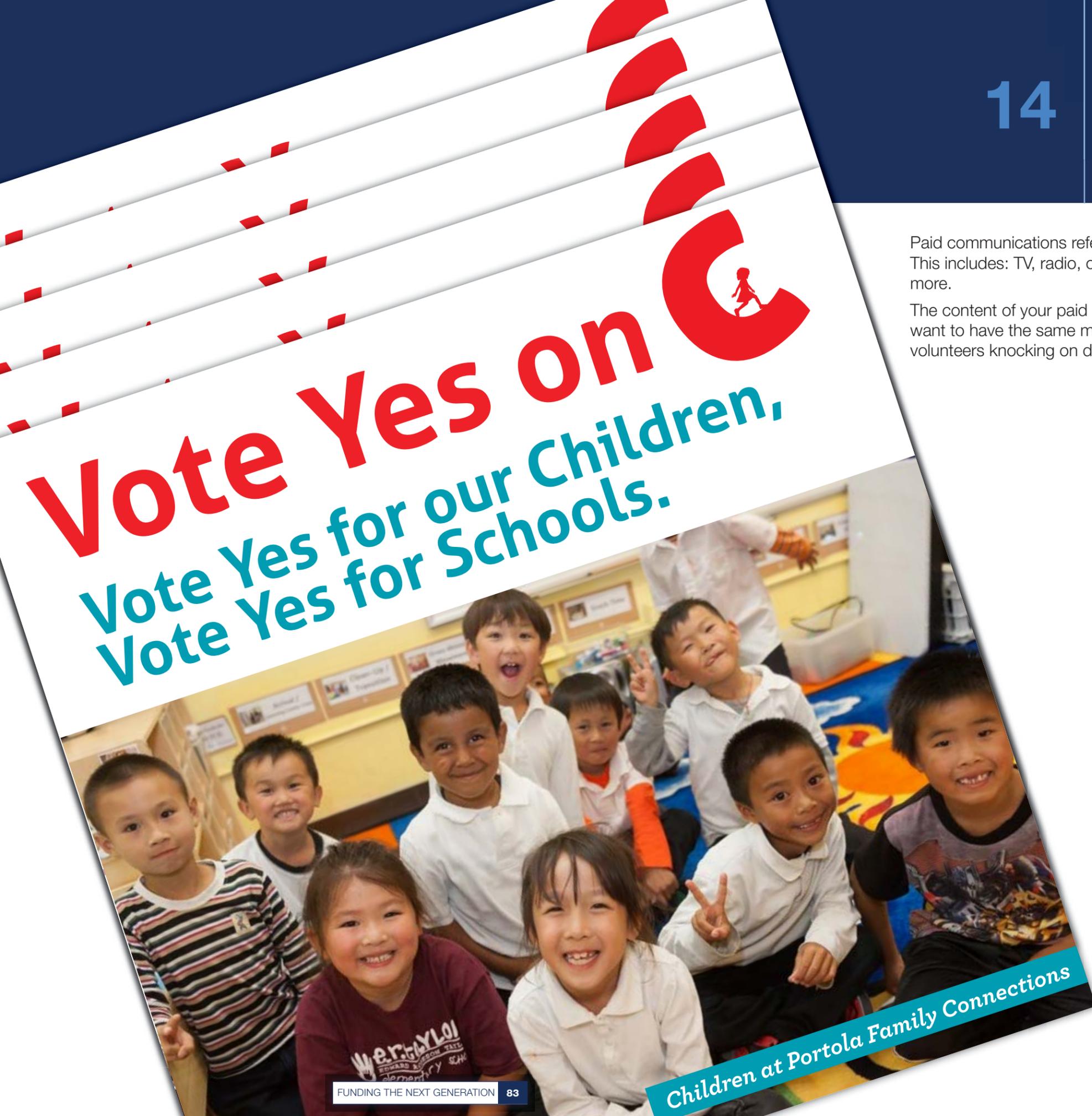
- Which journalists will be covering your campaign?
- What major events are you planning that local press are likely to cover?
- What do your 3 perfect stories look like?

Paid communications refers to *any type of advertising* that you pay to place in front of potential voters. This includes: TV, radio, or online ads; direct mail; newspaper and magazine print ads; billboards and more.

The content of your paid communications should be aligned with the messaging of your campaign. You want to have the same message in someone's mailbox as they read in the newspaper or hear from the volunteers knocking on doors.



Keep your message consistent. It will make all of your campaign communications more efficient.



## Direct Mail

People get a lot of political mail, and there is a good reason for it. It works. The advantage that mail has over other forms of paid communications is that voters will almost certainly have to be exposed to it. No matter how brief it may be; you are still putting your message in front of them.

Mail can also be targeted more efficiently than most other types of paid communications. You can use the voter file to segment people based on any combination of variables including their vote history, where they live, or their age. Direct mail communications are particularly effective in the final weeks leading up to Election Day. Many campaigns will include important voting information (precinct location, voting hours, etc) on their mail. Your campaign manager or consultant can help you develop a targeted mail program.

## Broadcast and Cable TV

It is very unlikely that a local children's fund ballot measure will have the resources for TV advertisements. If you do decide to do TV ads, there are two avenues: broadcast or cable. Both are expensive, and you'll need the help of a media buyer to help place your ads.

The reach of broadcast is massive, and media markets usually span multiple voting districts. It's almost impossible to narrow your audience to the voters you're specifically trying to reach. For example, a TV ad you run on broadcast TV in San Francisco is aired in Oakland, San Jose and many parts of Sonoma County. This works for statewide or national campaigns, but it is a waste of money for many local ballot measure campaigns.

Cable TV allows you to target your ads more specifically to people with certain viewing habits and preferences, but it is still very expensive and not necessarily a good use of your resources.

## TIPS

- On average, a mail piece will cost 65¢ per piece
- Targeting for paid communications is an art. It is critical to the success of your campaign that the right messages reach the right audiences. This is one of the most important jobs of your professional campaign consultant.

## Radio

Radio ads are more affordable than TV ads, but often the stations reach is too broad for the audience you are trying to reach. If you purchase radio ad time, be sure that the people tuning in are located within your district and can vote on your measure. Spanish or Chinese radio ads can be particularly effective in districts with a large number of Spanish- or Chinese-speaking voters.

## Digital

There are many types of digital ads across a range of platforms. Most of them allow you to target a specific audience, albeit in different ways. You can advertise on search engines, so that people see ads for your campaign when they search a series of terms associated with your campaign. Social media advertising is even more specific. You can use Facebook, Instagram, Twitter, and Snapchat to send ads to highly specific audiences, which can be organized based on age, gender, interests, or location. Digital advertising has low start-up costs and is easily scalable. You can reach a substantial audience with \$1,000, as well as \$20,000.

## Print

Ads in major newspapers are often very expensive and out of reach of local ballot measure campaigns. However, ads in smaller neighborhood or ethnic newspapers are often reasonably priced and can be well targeted at specific demographics. This can be an important way to get noticed with a targeted message for a specific audience.

## BRAINSTORMING FOR YOUR CAMPAIGN:

- What paid communications options are available to your campaign (direct mail, print advertisements, digital ads, etc.)?
- Based on your research, which platforms allow you to best get your message to the voters who are either persuadable or supportive of your measure?
- How many times are you trying to reach your target audiences?



## PAST EXAMPLE

### Solano 2016

The Solano campaign paid for a banner on the front page of the county newspaper for the week prior to the election. It was cost-effective and highly visible.

## Your Paid Communications Plan

You should use a combination of direct mail and digital advertising as the primary components of your paid communications plan. The idea is to layer your paid communications with your voter contact program (see Chapter 16: “Direct Voter Contact” beginning on page 93).

Think about your communication with voters in terms of “touches” – how many times someone will see (or be “touched” by) your message. Ideally, your paid communications plan will deliver between five and seven “touches” of your target universe. This could be any combination of ads in mail, print newspapers, digital, radio, or TV. For example, perhaps you design a plan that sends three mailers, and includes one radio ad, two digital ads, and one print ad in the newspaper. This would equal seven total “touches” to that universe of voters.

Think through about the timing and schedule of your paid communications plan. You don’t want people receiving multiple pieces of mail in one day. It’s much better to send one piece of mail per week in each of the three weeks before they vote.

Finally, be sure to separate vote-by-mail and Election Day voters and time your communications differently for each. More people vote by mail than ever before, many of them cast their ballots around a month before Election Day. For example, you could send the same three mail pieces to election day and vote-by-mail voters, the only difference would be that your vote-by-mail voters would receive them in late September to early October and your Election Day voters would receive them late October to early November.

## ★ TIPS

- With more and more people voting by mail, make sure your messages have time to resonate with these voters who will likely vote almost a month before Election Day!
- Remember to include pictures of kids on all your paid communications.

We’ve included some examples of different types of paid communications from previous children’s fund ballot measure campaigns.



## PAST EXAMPLE

### Sacramento 2016

During the 2016 campaign in Sacramento, children’s fund supporters focused their paid communications on direct mail—sending more than 225,000 pieces of mail across the course of the campaign! Their mail program leveraged data from polling results, which helped identify likely supporters and persuadable voters. This data allowed the campaign to tailor specific messages to the voters in order to move them toward supporting the measure.

### Demographic Profiles of Groups Disproportionately Likely to Support, Oppose, or be Swing Voters on Additional Investments in Kids

Consistent Supporters	Swing Voters	Consistent Opponents
Latinos	Ages 75+	Republican Men
Liberal Democrats	Republicans Ages 18-49	Republicans Ages 50+
Independents Ages 18-49	Use All/Mostly Landline	Conservative Republicans
Liberal	Conservative	Liberal/Moderate Republicans
Democratic Women	Conservative Republicans	Republicans
Liberal/Moderate Independents	Children Attend Public School	Conservative
African-Americans	Republican Men	Republicans Ages 18-49
Independent Women	Republicans	Conservative Independents
Women Ages 18-49	Moderate/Conservative Democrats	Men Ages 50+
BOS District 1	Ages 40-49	Republican Women
Ages 18-29	HH Income \$0-\$30,000	Have Adult Children
Ages 30-39	Children's Ages 5-10	Independents Ages 50+
Children Do Not Attend Pre-School/Pre-K	African-Americans	Ages 65-74
Voters of Color	Permanent Absentee Voters	HH Income \$120,000+
Interviewed on Cell Phone	All Other Cities	Men

# 15 Digital

When we say “digital organizing” we are referring to a number of tools, platforms, and types of content that serve two main purposes: on the one hand, they are meant to elevate existing online supporters to offline activists and on the other hand, they are meant to inform and engage new potential supporters.

There is no single, sure-fire approach to digital organizing. You will need to spend time figuring out what content resonates with your followers; what platforms they prefer; and what time of day is best to post on which platform. However, the great thing about digital tools is that we can easily track this information and we can make it easy for our followers to tell us how they feel about our content (without them realizing it).

## Creating Effective Online Content

Consider the people who will see and engage with your content– create three or four different personas that represent the different types of people, who will engage with your content. For example, the older generation who aren’t actively raising kids right now will need to understand how this ballot measure will impact their entire community. Young parents need to see the connection between the ballot measure and their own kids, but have far less time to spend online – you’ll need to send them easy-to-process content with fast action items.

Look at your content from the perspective of your followers. If you are about to send an email or post on Facebook, think to yourself: is this something I would want to receive in my inbox or see on my Facebook Newsfeed?

As you create content, consider the following best practices for the most popular platforms.

### Here are a few examples of platforms you might use to post content:

- Facebook
- Twitter
- Instagram
- Snapchat
- Email
- Medium
- Your campaign website
- Your campaign blog/newsletter



## Facebook

- Understand the difference between organic posts and paid ads. Organic posts refer to the things you post on your timeline. These are your typical, free posts that your followers see and engage with. Paid ads involve paying money to boost content to people beyond the people who follow your Facebook page. Post content organically on your campaign’s Facebook page. Use paid ads to increase the number of people who see your organic posts and other content, like videos, graphics, or events.
- Post 1-2 organic posts each day. Leave at least 2 hours between posts.
- Include simple, concise ideas in your posts. Boil big ideas down to 1-2 sentences. Posts shouldn’t be longer than 3-4 sentences.
- Use pictures and videos as much as possible.
- Respond to comments and FB messages, engage with your followers, but DO NOT respond to trolls, bullies, or anyone who is clearly just trying to bait you

## Twitter

- Tweet as many times each day as you’d like.
- Tweets that start with statistics or numbers perform better than tweets that do not.
- Retweet elected officials, candidates, or organizations of note that tweet ideas/content in line with your campaign. Retweet tweets from supporters, volunteers, and endorsers.

## Email

- There are two hurdles to engaging via email: people must first open the emails you send, then they must read actually read the text.
- Use snappy, engaging email subjects that draw readers in and entice them to open the email and learn more.
- On average, people will spend 15 seconds or less reading your emails. Write them accordingly.
- Most people read emails on their phones – format and test your emails to be sure that they look polished and professional on mobile devices.
- Try to include one ask in almost every email – give your followers a way to show their support, to engage their own networks, to show up at an event, etc. BUT do not include more than one ask in a single email.
- Use emails to fundraise, but make sure you send non-fundraising emails as well so that your followers don’t lose interest or unsubscribe.

## PAST EXAMPLE

### Solano 2016

The Solano Fund for Children campaign effectively used Facebook to push their messages online. Throughout the campaign they regularly posted different types of content aimed at their supporters such as campaign updates, news, or photos of children having fun with campaign signs. In the leadup to Election Day, they ran a Facebook ad campaign targeted at their most supportive voters (women over 45). Even with limited resources the campaign successfully engaged their community throughout the course of the campaign, and help turn out their likely supporters to vote.

## Weaving Online and Offline Organizing Together

The keys to engaging people online are largely the same as engaging them offline, this is why it is critically important to weave online and offline organizing together. You can use digital organizing to supplement or boost parts of your ladder of engagement.

However, you must be sure that your online messaging and branding is consistent with your offline messaging and branding. The importance of consistency can't be stressed enough. If your online content doesn't match your offline content, you are wasting your time. Use online platforms to amplify the message(s) you are using in any and all offline communications.

You can utilize online tools to engage people and share updates, give them easy and manageable ways to show their support, then transition your most engaged supporters into offline activists. Create online RSVP pages for offline events (on Facebook or Eventbrite), so that you can promote offline events through online channels (like emails and Facebook) and people can RSVP quickly, easily, and digitally. Follow-up with texts or calls to confirm their attendance – online RSVPs, particularly Facebook, are unreliable unless you touch base again.

After events, send follow-up content to people who did not attend to demonstrate how easy it is to get involved and have a big impact. Don't worry about duplicating information across multiple online and offline platforms. As with offline organizing, people need to see information 2-3 times for it to really resonate.

Whether you engage them online or offline, people generally want to get involved without exerting a significant amount of time or effort, while having a big impact. You can show supporters that it is possible to get involved, on their own terms. Reflect this in your language, but also in the videos, photos, and updates you share about other volunteers and their profound impact.

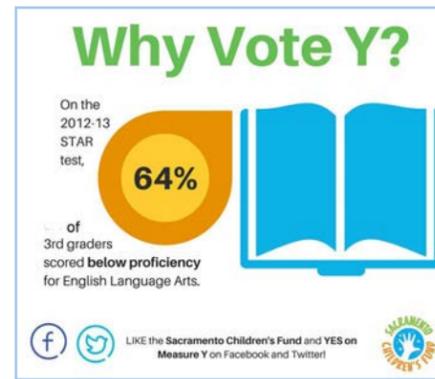
## Activating Supporters Online

Engage with the people who want to be engaged. Don't send emails to people who don't open them. Send emails to people who open them, who click links, and who take action from them. Consider them engaged followers – who are likely to engage again. Give them more ways to engage – and ask them to share content through their own channels so that you're engaging people outside your immediate network.

You should be constantly working to grow your social media followers and your email list. You can grow your list through online and offline tactics, like an online petition or a sign-in sheet at an event.

Give people all of the information they need – to vote, to volunteer, and to engage their friends and neighbors – but in small, digestible chunks of content. Don't send an email that outlines how to volunteer, where to vote, and how to register. Break that into three separate emails, with corresponding social media posts, shareable graphics, and online sign-up pages for volunteer shifts and other events.

Keep in mind that if someone just joined your list, they are unlikely to immediately sign up for a slew of volunteer shifts. Ease people into your content. Be careful not to harass them. Simply keep them informed and, initially, give them small ways to engage. Then, take note of who engages in those small ways and progressively give them larger and larger ways to engage until you ask them to sign up for a shift or attend an event. Approach online organizing in the same way that you approach offline organizing – meet people where they are, in the transition from bystander to supporter to activist.



**SACRAMENTO CHILDREN'S FUND**

**MEASURE Y**

If you want to...

- ◆ be a leader.
- ◆ make Sacramento better for young people.
- ◆ advocate for a cause you believe in.

**VOLUNTEER**

**WITH A YOUTH-LED CAMPAIGN IN SUPPORT OF MEASURE Y.**

WANT TO VOLUNTEER? HAVE QUESTIONS?

Contact CJ Lynch  
Call or Text 69.400.1033  
Email [measurey2016@gmail.com](mailto:measurey2016@gmail.com)

**Y = youth**

Measure Y, also known as the Sacramento Children's Fund, will be on the ballot this June. If it is passed, it will be a funding source for youth programming in Sacramento.

**MEASURE Y**

**change starts with you.**

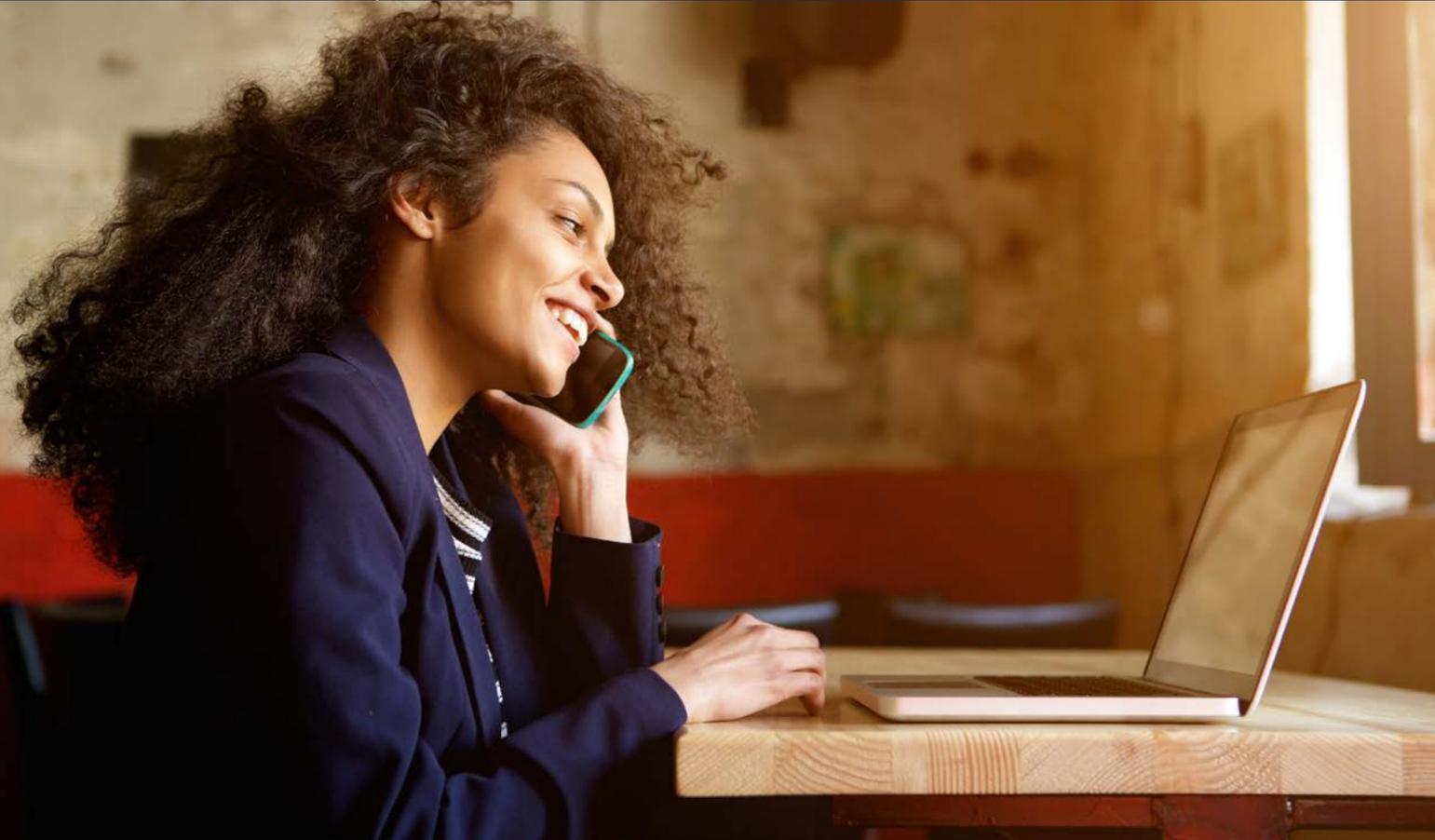


### BRAINSTORMING FOR YOUR CAMPAIGN:

- What online platforms do you use personally use the most?
- What platforms are the supporters in your community using most?
- What is the type of content that you like to see in your newsfeed or inbox?
- What content can you create that is similar to this?

# 16

# Direct Voter Contact



All of the planning and work that goes into your campaign ultimately comes down to whether or not you can identify your supporters and get them to the polls on Election Day. The best ads created with the most money featuring the most eloquent spokesperson won't matter if you can't get your people to cast their ballots.

**You will not have unlimited resources to reach every voter – so you will need to segment the potential voters and be strategic about where you focus your attention.** To decide who you should spend our time talking to, we first divide voters into universes. The information gathered in your polling data and publically accessible voter history will help you build your universes. A universe is a distinct group of voters that share certain qualities. We take eligible voters and divide them into three groups based on vote propensity:

- **Seldom or Never Vote** – irregular or unregistered voters
- **Sometimes Vote** – typically those who have voted in the last 2/4 similar elections
- **Always Vote** – people who have voted in at least the last 4/5 similar elections

From these three groups we have supporters, opponents, and swing or undecided – giving us nine potential universes. Every universe gets a different “treatment” aka outreach strategy. The various universes are listed below in priority order:

- 
- 1. Those who are very strong supporters and always vote**  
These are people who will volunteer or give money. They don't need persuasion, but they need engagement
  - 2. Those who support us but need some help to getting to the polls**  
GOTV (Get Out The Vote) universe; the voters we have to get out to the polls; ask them to volunteer and to commit to voting early or on Election Day
  - 3. Those who support us but do not vote or are not registered to vote**  
These people are your targets for base building and volunteer engagement; ask them to volunteer or to register to vote and commit to voting early or on Election Day
  - 4. Those who are swing voters and always vote**  
These are your persuasion targets
  - 5. Those who are persuadable and sometimes vote**  
Your secondary persuasion targets

		Candidate Support		
		Very Strong Opponent	Swing Voters	Very Strong Support
Voting Propensity	Seldom or Never Vote			3
	Sometimes Vote		5	2
	Always Vote		4	1

What about people who **don't support us at all**? Forget them! Trying to engage with people you know are not going to be supportive is not a good use of resources.

Now that you know who you're going to talk to when and what to ask of them, you can begin executing your voter contact program. You need to talk to as many people as possible to identify as many supporters as you can. This involves having direct conversations with voters on the phones or at their doors.

**Phone banking and canvassing can have a significant impact on voter turnout.** The most effective way to make sure someone gets to the polls is to have a face-to-face conversation with them at the door. Research by the Analyst Institute, a progressive research organization, has shown canvassing can increase voter turnout by:

- 7.8% after persuasion conversation
- 5.5% after mobilization conversation
- 5% increase for *other members of the household*

Phone banking should also be a key tactic in your voter contact program. Often volunteers are more willing to make phone calls than to go door to door. Phone banking is arguably more efficient than canvassing because you can make more calls per hour.

You should also be thinking about voter contact programs as a way to develop leadership within your campaign. The bulk of the work should be executed by volunteers. Give those who take on leadership a special title or role, like "phone bank captain" or "canvass captain" and allow them to take ownership of running their own voter contact events.

"The field campaign was all done by young people. We had parallel canvassing operations door knocking and phone banking for the last 6 weeks. They were the power behind the campaign. They had a great experience. This was another major success of the campaign."

*Claudia*  
Campaign Manager, Sacramento

### Volunteer Phone Banks

- Identify and train a volunteer phone bank captain; this person is responsible for training other volunteers, gathering materials, and handling questions or issues during the phone bank
- Materials needed: phones, chargers, call list, script, pens, talking points
- On average, you can assume 35 dials per hour with a contact rate of 10-15 percent
- Most phone banking shifts are 3 hours in length and can be held at an office, coffee shop, supporter home, or campaign office
- Be strategic when planning your phone banks; the best time to call is between 5 pm – 8 pm on weeknights and after 10 am on weekends
- If you are running regular phone banks, plan to purchase pre-paid phones (\$20-30 each) and budget \$40-50/month for unlimited calling for each line
- Also budget some money for food and other incidentals associated with running a phone bank

### Volunteer Canvassing

- Identify and train a volunteer canvass captain; this person is responsible for training other volunteers, gathering materials, and handling questions or issues during the canvass
- Materials needed: clipboards, walk list, map, pens, literature, bottled water, snacks
- Plan your volunteer canvassing on the weekends – you will get more volunteers to show up and have a higher contact rate at the doors
- Most canvassing shifts are 3 hours in length and should be launched from a location near the area that you'll be sending volunteers; this could be anywhere – a parking lot, park, home, office, business, etc.
- On average, you can assume a very dense walk list in an urban district: average 25 doors per hour; 5 contacts per hour; if you have a sparser walk list or more suburban district with less density: average 15 doors per hour; 4 contacts (3-6 contacts) per hour.



### Support Scale

We typically assess voter support on a 5-point scale based on the conversation you had with them. Collecting this information is critical if you plan to use the data to inform your campaign strategy and GOTV operation.

- 1 = strong supporter
- 2 = leaning toward support
- 3 = undecided
- 4 = leaning toward opposed
- 5 = strongly opposed

## Data

Data is the backbone of your campaign's organization – your supporters, contacts, donors, event attendees, phone calls made, doors knocked on. It is all of your information. Period.

**When a campaign has accurate and dynamic data from a variety of sources that is well organized, it can pivot, grow and mobilize faster and more effectively.**

You will collect information every day that will help you make decisions in the future. Every time you talk to a voter on the phone, or at the door, send an email, or organize an event, online or offline, you are collecting and creating data. The more you know about what you do, who you did it with and how participants responded, the better you'll be at finding the best way to get them involved in the future. It's even important to be able to understand who doesn't want to be involved and why, so you can improve your outreach or manage your time wisely.

Voter contact data is tracked and managed through an online software program, such as Nationbuilder, Political Data Inc (PDI), or Voter Activation Network (VAN). These programs offer varying levels of information and different ways to manipulate the data.

### Nationbuilder

Good for collecting online sign ups and then tracking interactions with them. Many campaigns will host their website on Nationbuilder and use the backend to manage donor data, voter contact, and volunteer sign ups. Voter file lists need to be manually loaded into Nationbuilder.

### PDI

Should be used if you're planning a large scale voter contact push or to purchase your direct mail data set. They have a reputation for the most cultivated and up-to-date voter file information.

### VAN

Widely used for its ability store detailed information about each interaction you have with voters and volunteers. The program allows you to create lists of voters based on their location, vote history, demographics, language preference, and survey responses, among other variables. The voter file information is usually updated prior to each major election (presidential years or midterms).



### TIP

Managing campaign data can seem complicated, but your campaign manager and professional consultant will be familiar with this software and can help you manage this process!

### Data helps you make strategic decisions about how best to use limited resources

As you know, all campaigns begin with limited resources. You must leverage the resources you have to build the power you need. Having reliable data will help you to figure out where your resources may be applied to yield the maximum result.

### Data helps you keep your organization accountable to your goals

Reports and metrics help campaigns understand achievements and failures, as well as opportunities for improvement over time. Collecting data from your voter contact program will allow everyone involved—leaders, organizers and volunteers—to routinely and transparently monitor the progress toward established goals, learn from success and failure, and help leadership decide when and where a strategic change is necessary.

### Data helps you demonstrate power and success

Every successful campaign justifies their work to donors, partners, members, and even elected officials or other leaders. Keeping clean data day in and day out will allow you to provide tangible, quantifiable, and qualitative results to make a compelling case for continued or greater funding, solid and reliable partnerships, and more appropriate allocation of funding.



## GOTV

Get Out The Vote or GOTV (gee-oh-tee-vee) is a highly targeted mobilization program aimed at getting your identified supporters to mail in their ballot or get to the polls on Election Day. Winning campaigns know that everything you do ultimately leads to these final crucial days. You will need to build a specific strategy around making sure your voters have the information they need, specifically where polling locations are, when the polls are open, what to bring with you, what to do if you have issues voting.

Before you develop your GOTV strategy and plan, make sure you know the state and local laws in your district. Be sure you know: when registration deadlines are; if you can register and cast a ballot on the same day; what information you need to register to vote; what documentation you need to bring with you to vote (if any); when in-person early voting starts and which locations offer it; when absentee ballots get mailed; and, when absentee ballots need to be postmarked by.

After you have learned what the rules are around voting, craft a game plan for making sure ballots get cast. Then, start applying tactics to those ideas. Do this early on in your campaign planning—don't think of GOTV as the final lap of a marathon. Remember, everything you do in your campaign should lead up to and reinforce your GOTV strategy.

Who should you talk to during those final precious hours before polls close? Your top-tier targets should be the voters you've identified as supporters who have a poor vote history. You know these people support you, but they need an extra push to get to the polls.

The conversations you have during GOTV should be focused on making a plan to vote. We call this “plan making” language and it should be incorporated into your scripts. You are doing more than just reminding people to vote. You want to walk them through their plan for the day and get them thinking about the specific details.

Switch your phone bank and canvass scripts from identification/persuasion (“Can we count on your support” or “You should vote for our initiative because...”) to plan making (“Your polling place is [XX], what time are you planning to go vote on Tuesday, will be you bringing anyone with you?”).

Another best practices is to use “identifiers” to reinforce a positive association with voting. Remind your supporters that they are the kind of people who care about the future of their community. That voting is important and casting their ballot means they are committed to improving our community. Always thank them for being a voter.

## ★ TIPS

- Know where to direct people who need a ride to the polls (often this is a third party, local nonprofit organization)
- A member of the team should go and poll watch in key precincts, and if possible, at all polling locations. Just to ensure there are no shenanigans, and things are running smoothly
- Make sure you have enough materials (literature, door hangers, paper, pens, clipboards, etc) and pre-order ahead of time if you're running a large scale GOTV program.



## BRAINSTORMING FOR YOUR CAMPAIGN:

- How many people are in each of your five universes? (see page 94)
- What method of direct voter contact is the most efficient for your district?
- What is your capacity for direct voter contact, (taking into account staff and volunteers)?
- How many people can you contact in your campaign?



# PART IV

## Putting It All Together



- 17 Campaign Budget
- 18 Timeline
- 19 It's Time



In this section we will do a deeper dive into how to draft, manage and track your budget. A campaign budget isn't a financial document, it's actually a priorities document. Ultimately every financial decision you make is going to be about priorities. Throughout the course of the campaign you will continually have to ask, how will I spend this dollar? How do I make sure it gets spent in the most effective way possible?

Your campaign budget is the most important document in your campaign. It will guide almost every decision you make, it is the intersection of every aspect of your campaign.

There are three main pieces to managing your budget.

#### Expenditures

In short: how much will we need to win? Throughout the course of your campaign there are going to be a lot of worthwhile opportunities to spend money. You should define your priorities early. What pieces are most important to your campaign, and how much will they cost?

#### Fundraising

How much can you likely raise? You must be realistic about your fundraising capabilities. The bottom line is that you can't spend money you haven't raised. If you don't make accurate estimates on your ability to raise money early on your funds will dry up and your campaign will grind to a halt.

#### Cash Flow

Cash flow is an often overlooked, but critical piece of budgeting. It is the process of managing your money to ensure funds are always available. Remember, if at any point, you have no money in the bank your campaign will fail.

Expect the worst when estimating how much your campaign will cost. Things are likely going to cost more than you've planned, so make conservative estimates about costs. Conversely, you also don't want to expect to raise more money than you realistically can.



#### TIP

Make sure you make realistic estimates about your fundraising abilities.



#### TIP

Use the 15/15 rule. Budget 15% more than you think things will cost and expect to fundraise 15% less than your assessed capacity.

However, do not assume that this is the budget that you should be working with necessarily. There are a few questions to consider when determining whether or not your budget needs to be significantly higher than these examples.

#### 1. How much potential opposition is there for your measure?

- Is your measure controversial?
- Have any organizations (labor unions, etc.) indicated that they would put resources into opposing your measure?

#### 2. Does your measure raise taxes in any way?

- Raising taxes is never easy. Depending on what type of tax you are pursuing (i.e. sin tax, sales tax, etc.), you will likely need to spend additional resources to convince the electorate that the cost is worth the investment.

#### 3. How is your measure polling?

- It's important to do a poll to test your measure before you determine your budget. If your measure is polling tightly you will need to spend more resources than if it is not.

#### 4. How large is your target electorate?

- If you are running a ballot measure in Los Angeles County for instance, it will cost much more than a citywide ballot measure in Vallejo. You can use our budget estimates to scale up based on the size of your electorate.

We've prepared two sample budgets, a low end (\$125,000) and a high end (\$275,000) to give you an idea of potential campaign expenditures. These budgets list the typical expenditures for a county-wide ballot measure in most parts of California. However, if you live in a larger city, some of these estimates may be low.

High-End Budget			
	Months	Cost	Total
<b>Campaign Leadership</b>			
Consultant	10	\$5,000	\$50,000
Campaign Manager	8	\$6,000	\$48,000
Staffing Total			\$98,000
<b>Communications</b>			
Digital Ads			\$17,500
Direct Mail (including commission)	110,000 pieces	\$ 20,000	\$60,000
Slate Cards			\$10,000
Paid Ballot Arguments			\$2,750
Polling (full survey)			\$20,000
Communications Total			\$110,250
<b>Field/Community Engagement</b>			
Doorhangers	20,000 units		\$2,750
Field Events			\$2,000
Campaign Paraphernalia (Signs, Stickers, etc)			\$7,500
Paid Field Program			\$12,500
Field Director	4 Months	\$ 4,500	\$18,000
Field/Community Engagement Total			\$42,750
<b>Finance/Treasury</b>			
Fundraising Event Costs			\$5,000
Merchant Bank Fees			\$1,500
Treasurer's Fees			\$7,500
Fundraising Total			\$14,000
<b>Overhead</b>			
Digital/Website			\$1,500
Photography			\$1,000
Contingency			\$7,500
Overhead Expenses Total			\$10,000
<b>TOTAL</b>			<b>\$275,000</b>

The low-end budget includes a small expenditure for campaign consultants and only one staff member. This campaign will require volunteers to provide more organizational support if it is going to be successful. This means less volunteer resources available for voter contact. The larger budget has additional staff meaning volunteers can be focused on direct voter contact.

Low-End Budget			
	Months	Cost	Total
<b>Campaign Leadership</b>			
Consultant	10	\$2,500	\$25,000
Campaign Manager	6	\$4,500	\$27,000
Staffing Total			\$52,000
<b>Communications</b>			
Digital Ads			\$5,000
Direct Mail (including commission)	41,000 pieces	\$ 8,250	\$24,750
Slate Cards			\$3,000
Polling (Shorter)			\$15,000
Communications Total			\$47,750
<b>Field/Community Engagement</b>			
Doorhangers	10,000 units		\$1,800
Field Events			\$2,000
Campaign Paraphernalia (Signs, Stickers, etc)			\$4,000
Field/Community Engagement Total			\$7,800
<b>Finance/Treasury</b>			
Fundraising Event Costs			\$5,000
Merchant Bank Fees			\$950
Treasurer's Fees			\$5,000
Fundraising Total			\$10,950
<b>Overhead Expenses</b>			
Digital/Website			\$1,500
Photography			\$1,000
Contingency			\$4,000
Overhead Expenses Total			\$6,500
<b>TOTAL</b>			<b>\$125,000</b>

Once you've set your campaign budget, you'll want to incorporate it into an ongoing cash flow tracking document where you track how much money comes in and out each week.



### TIP

Your budget is a living, breathing document. It should be updated weekly, or even daily, as circumstances change and you get closer to Election Day.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- Realistically how much will you be able to raise?
- Are there any things you can do to help defray some of these campaign costs through your network?
- Identify your top three priorities aside from staffing.

# 18

## Timeline

If you are going to be successful in securing a dedicated funding stream from the ballot it is going to take time, effort and a methodical approach to get to the ballot. This is a process that could take years and shortcuts shouldn't be taken. The natural inclination is always to get to the ballot as quickly as possible, but it is more important to get things right, and invest the time to build your community if you want to be successful.

The date of the next election shouldn't determine how long it will take to complete this process. The size and strength of your community should determine when you are ready to go to the ballot.

The following timeline provides will give you an idea of what needs to be done and when. Every campaign will be different and some of these pieces will overlap, but this should serve as a general guide to help you plan for yourself. but the important thing to note is that this is a long process which will only benefit from investing the time.

### San Francisco 2014

In San Francisco, the 2014 reauthorization campaign for the children's fund began almost 3 years ahead of time, with a community advocates organizing nonprofits and others to develop recommendations for improvements in the fund. They went so far as to draft a new measure, and do polling to test public sentiment for the additions they proposed. They began lobbying elected officials for the changes in the measure months before it had to be placed on the ballot – and used polling results to make their case. In the end, the group's work led to major changes in the children's fund, including a 33% increase in the set-aside of the property tax, increasing services up to age 24, and creating a citizen oversight committee for the fund the first time.



### BRAINSTORMING FOR YOUR CAMPAIGN:

- What is your target election date?
- Would your campaign benefit from waiting until the following election?
- What does your campaign timeline look like? What are 3 action items for each phase of the campaign?

## COMMUNITY BUILDING

Many campaigns aren't won or lost on Election Day, their result is determined months or even years before. A strong, driven community of support can be the difference between winning or losing, and it takes time to build. During this phase you should focus on connecting with other people and organizations that are passionate about funding children's services. Funding the Next Generation has additional tools to help you through this process in its organizing manual "*Creating Local Dedicated Funding Streams for Kids.*"

**2 years**  
before election

## MESSAGE AND COMMUNICATION

Following the research phase you should now have a better understanding of what pieces of your measure are popular. This will help guide your messaging which will be used throughout the last year of the campaign. You're trying to win an election, not a policy debate. Focus on the pieces that you know are going to resonate with your audience. Start early, stay consistent. Only after people have heard your messaging again and again will it start to stick.

**1 year**  
before election

## GETTING ON THE BALLOT

Whatever your path to the ballot, either through collecting signatures or having an elected official endorsed measure, the deadline to qualify for the ballot is going to be around 6 months before the election (although this does vary from county to county). Through either approach, this is going to take time, you can't walk into your local Mayor's or local county Registrar of Voter's office a day before the deadline and expect they will put something on the ballot for you, just like you won't be able to collect thousands of signatures in a week. Make sure you have a plan laid out with key dates well in advance of formal deadlines.

**6-9 months**  
before election

## VOTER ENGAGEMENT

The vast majority of your direct voter contact (doorknocking/phonebanking), paid communications, and events are going to occur in the last 6 months before the election. Remember, many "ordinary voters" won't even be paying attention until the last few weeks before the election. Make sure you focus the majority of your direct voter contact efforts in the leadup to election day!

**Last 4 months**  
before election

**Election Day**

**1-2 years**  
before election

## RESEARCH

Much of this research may have been happening for months or years already, but it is important to conduct a "landscape analysis" of local funding for children's services. What programs are already funded? What programs do you think are missing? What are the areas of greatest need? Who are your likely supporters and opponents? Understanding all of these pieces early will help you build a better measure. This is also a good time to conduct a feasibility poll to provide guidance on how voters feel about your measure, what specific pieces you should consider including and what messages are resonating with your community.

**1 year**  
before election

## FUNDRAISING/FINANCE

It is never too early to start raising money, and the last year is when you'll do the majority of your fundraising. Make sure you've engaged a compliance expert to advise you on the rules before you start raising money. Set weekly and monthly goals for how much you need to raise. Then, set goals for the number of phone calls and events you need to hold if you want to make this a reality. Be prepared to adjust in order to meet or exceed your goals!

**3 months**  
before election

## SECURING ENDORSEMENTS

As we discussed, there are different phases to the endorsement process. If you've been successful in the community building phase, you will have already secured the endorsement of some local elected officials and community organizations. Continue securing individual endorsements as you build relationships – stay proactive about it. Remember, many organizations that endorse ballot measures don't make their decision until a couple of months before the election. Do your research to understand the process and timing for each of your target organizations.

This manual was designed to provide you with the tools you need to move your advocacy efforts to the ballot box, so continue to use it as you roll out your campaign. Even if we had 1,000 pages though we still wouldn't have enough space to fully prepare you for everything you are going to face in the coming years and months.

Don't worry. All of us have experienced the doubt, nerves and pressure that go along with running a campaign. This is only natural. With this manual in your back pocket and the right team around you, you're going to be set up for success. Regardless of what happens on Election Day, your advocacy work, your organizing efforts, and your messages are going to make your local community a better place. Just having a campaign means you have already won and so has your community.



Good luck!

**Margaret Brodtkin**  
*Funding the Next Generation*

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**FUNDING THE NEXT GENERATION** is the nation's first and only initiative to support communities in developing local measures that create dedicated funding streams for services for children, youth and their families. Funding the Next Generation was founded in 2013. Its work grew out of the lessons learned in San Francisco's budget and electoral work to expand funding for children's services. Since its founding, the initiative has worked with leaders and coalitions in communities throughout California, engaged hundreds of stakeholders in learning about dedicated funds, and has researched and prepared documents and tools that provide basic information for those interested in sustainable funding streams. Funding the Next Generation is expanding its reach beyond California to work with cities and counties throughout the country.

# Footnotes

1. Wellstone Action
2. Available at: <http://www.fppc.ca.gov/content/dam/fppc/NS-Documents/TAD/Campaign%20Forms/410.pdf>
3. Depending on the jurisdiction, this may be the county registrar of voters, city clerk, or the local ethics commission.
4. If the committee is formed to support (or oppose) more than one ballot measures in more than one election, or in more than one jurisdiction, or if the committee is controlled by an elected official or another entity, please consult an elections attorney.
5. Available at: <https://www.irs.gov/pub/irs-pdf/fss4.pdf>
6. Available at: <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
7. Available at: <https://services.irs.gov/datamart/login.do;jsessionid=w4hGiQXVUrUHlLZKW-dtfMp>
8. Note: as 501(c)(4) organization, ballot measure committees must also file a tax return (Form 990) with the IRS within 4.5 months subsequent to the end of the tax year
9. Failing to segregate funds, or opening a bank account with an individual's social security number may create significant tax liability for the individual and the committee's donors.
10. E.g. if a person/entity makes a contribution on behalf or at the behest of another person and has been or will be reimbursed for the contribution
11. The nonprofit serving as an intermediary for the ballot measure may incur registration and filing obligations
12. <http://www.fppc.ca.gov/content/dam/fppc/NS-Documents/TAD/Campaign%20Forms/460.pdf>
13. Please check with the FPPC regarding applicable deadlines
14. <http://www.fppc.ca.gov/content/dam/fppc/NS-Documents/TAD/Campaign%20Forms/497.pdf>
15. A major donor is defined as any individual or entity (e.g. corporation, firm, business, proprietorship) that makes one or more contributions to state or local committees totaling \$10,000 or more in a calendar year.
16. FPPC Form 461, available at <http://www.fppc.ca.gov/content/dam/fppc/NS-Documents/TAD/Campaign%20Forms/461.pdf>
17. This includes any organization described in Sections 501(c)(3) to 501(c)(10) of the Internal Revenue Code that is exempt from taxation under Section 501(a), federal or out of state political organizations, professional associations, trade associations, fraternal societies, and educational institutions.
18. Exception: a nonprofit organization is not required to file as a recipient committee if the organization uses only "non-donor funds" (e.g. investment income, interest income, capital gains, or income from providing goods and services) to make contributions or expenditures. However, the organization may still qualify as a "major donor committee" or an "independent expenditure committee" if it contributes \$10,000 or more, or makes independent expenditures of \$2,000 or more.
19. Lobbying limits are applicable to 501(c)(3) organizations only. 501(c)(4) organizations may carry out unlimited lobbying so long as such efforts furthers the organization's tax-exempt purpose.





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