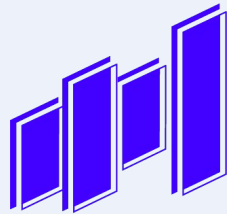


# Transitioning to Campaign Mode



50+1 STRATEGIES

+





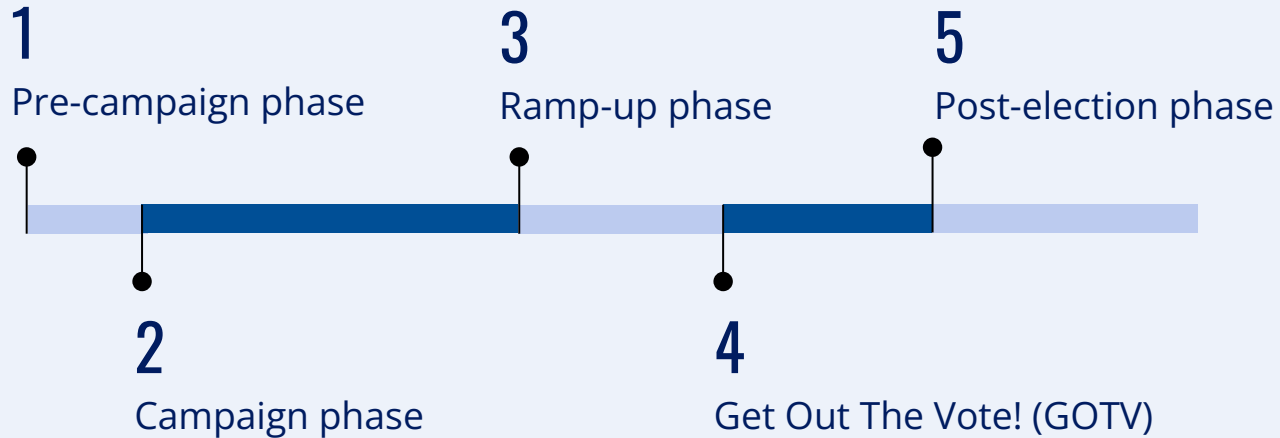
## Session Overview

- Phases of a Campaign
- Campaign Planning
- Campaign Components
- Campaign Strategy Basics
- Coalitions & Decision-Making
- Campaign Roles
- Setting Your Campaign Up For Success

# PHASES OF A CAMPAIGN



There are five phases of a campaign



# Decision-Making Factors



**Impact**

**Leadership &  
Team (your  
coalition)**

**Viability &  
Research**

**Electoral  
Landscape**

**Resources  
(\$ and people)**

**Due Diligence &  
Potential  
Opposition**



# Elements of Campaign Strategy



# What is your campaign's

## *Theory of Change?*



What are the **goals** you seek to achieve through this campaign?



What are the **strategies and actions** needed to accomplish those goals?



What **outcomes** do you expect to see result from those strategies and actions?



# Setting Campaign Goals

S

Specific

M

Measurable

A

Achievable

R

Relevant

T

Time-bound

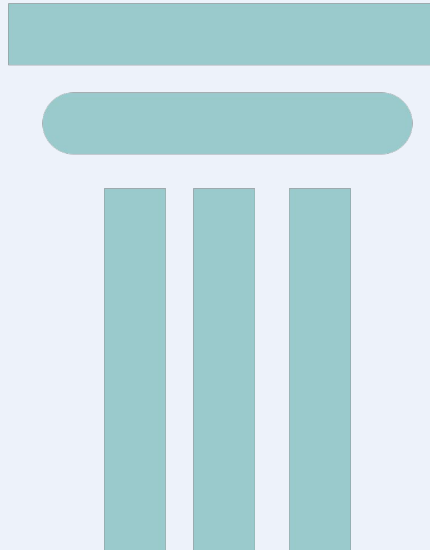


# The **Three Pillars** of Campaign Strategy

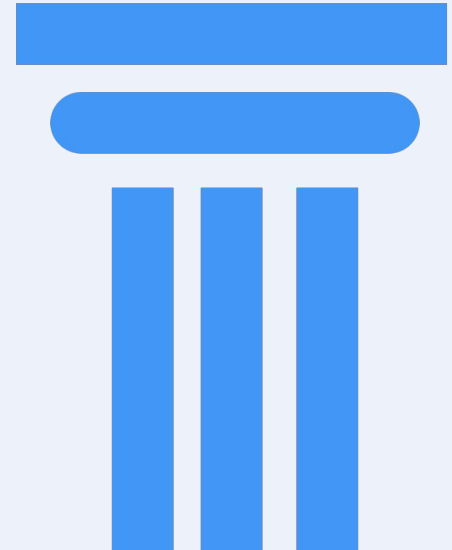
**Education/Awareness**



**Persuasion**



**Mobilization**





# Developing Your Campaign Plan



# Plans Center & Focus the Work

- Effective campaigns are values-based
- Winning campaigns are focused
- Plans establish campaign credibility
- Plans builds consensus and alignment around the plan, strategy and values
- Ballot Measure Campaign Plans do not stop on Election Day
- Plans helps you maintain focus in a crisis

# Key Differences with Ballot Measures



- Ballot measures have no candidate to set the tone and be the main messenger
- Cannot always depend on partisan triggers
- More complex decision making structures (coalition, committee)
- Different finance rules = different staffing structures
- Legal issues are more prominent



# Win Number



## Calculating Your Win Number

Look at how many are usually cast in this election, and what **percentage of votes it usually takes to win**. Take into account the political environment in your community.

- **Estimate turnout:** the likely number of voters who will cast a ballot in this election
- **Consider drop-off** for local ballot measures (use the lowest percentage of drop-off in the last 3 similar elections)
- Determine the **percentage of votes you need to win**
- Add a **buffer of 2%**
- **Most important:** continue to monitor and adjust



# Ballot Measure Laws and Rules



- Writing and filing the proposed ballot language
- Review and clearing by state/county/city officials
- Signature gathering
- Counting and verifying signatures
- Shaping the official voter information pamphlet

# Timelines Matter



## Understand the most important deadlines and work backwards

- When is the last day to file your measure?
- When is the last day to pull your ballot measure?
- When will language be final and approved for circulation?
- When will petitions be printed?
- When can signature gathering begin?
- When are signatures due?
- When do you want to turn in signatures?
- NO campaigns: When can you file a legal challenge on signatures?
- What is the deadline for challenging the ballot title, question, or description?

**You really, really need a lawyer.**

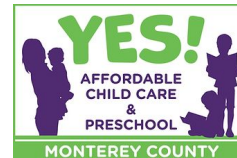


# TENTATIVE GENERAL TIMELINE

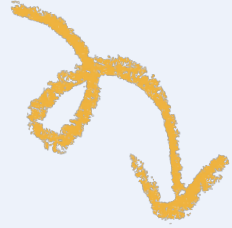
Assuming no signature gathering – Put on ballot by City Council or Board of Supervisors



FUNDRAISE FUNDRAISE FUNDRAISE FUNDRAISE







# Campaign Components



# Campaign Components

## **BUILDING YOUR SUPPORT BASE**

(Endorsements, Coalition Development)

## **PROFESSIONALIZING YOUR OPERATION**

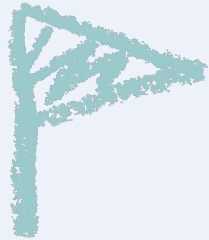
(Compliance/Legal, Budgeting, Structure/Decision-Making)

## **NEUTRALIZING & MINIMIZING OPPOSITION**

## **VOTER COMMUNICATIONS**

(Message Development, Earned Media/Press, Paid Communications, Field Direct Voter Contact)





# Building **Your Coalition &** Putting Together Your **Campaign Team**



# Why do we build coalitions?

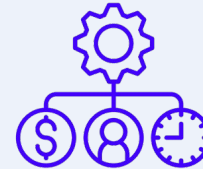
1

Collaborative Strategy



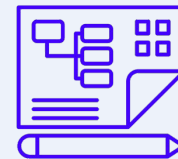
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Maximize Resources



3

Plan Long-Term



# Coalition Spectrum

Awareness

Coordination

Collaboration

Co-Creation



# Doing it right



- **Get the right people involved EARLY!**
- **Bring multiple perspectives to the table**
- **Be conscious of equity & implicit bias**
- **Trust takes time**

# Getting The Right People Engaged



Look for organizations and leaders:

- who have a history of leading work on this issue.
- who are directly impacted by this issue.
- who have deep relationships in the communities you need to vote in favor of your ballot measure.
- who might be with us and have deep relationships in the communities you need to stay neutral on your ballot measure.



# Getting The Right Structure

Getting the right people engaged is important but so is setting up the structures and processes for engaging those individuals.

- Be crystal clear about who is responsible for what.
- Be crystal clear about how you will communicate.
- Having a clear structure can help with both clarity and accountability.



# GETTING STARTED



## Convening organization

- Must have credibility with initial coalition, the community at large and the political establishment.
- Must have capacity to staff a committee or coalition.

## Ground Floor Committee

- Motivated and trusted allies
- Composition – expertise in children, political knowledge, representative of diversity of community, representatives from key organizations needed for drafting and passing measure.

## Tasks

- Assess feasibility of campaign
- Identify revenue strategy
- Develop measure framework
- Form a political committee
- Conduct poll
- Identify allies and opponents



# THE STEERING COMMITTEE



## CENTRAL DECISION-MAKING BODY

Chair – Must be knowledgeable, skillful negotiator to find solutions when differences occur

Size – 6 – 10

Composition – Can evolve as needs change

Skills needed:

- Funding
- Endorsements
- Policy
- Volunteer recruitment
- Spokesperson
- + Staff

Decision - What is the “ask” for being on the committee?

Create an **Advisory Committee** to involve a broader network – could have 40 members



# STAFFING



## **General Consultant** – Political campaign expert

- Role – Campaign plan, budget, strategy, vendor selection
- Critical selection process- evaluate experience in your community, with your issues, previous success, interest in the cause, personal relationship with Steering Committee

## **Campaign roles**

- Manager/Coordinator
- Treasurer
- Fundraising
- Coalition building
- Recruiting and managing volunteers

Key decision – Paid vs. Volunteer responsibilities





# KEY STAKEHOLDERS

## What should be their roles?



- Non-profit providers
- Parents and youth
- Public agencies
- School districts
- Political champions
- Civic organizations
- Labor
- Community volunteers
- Advocacy organizations



# Navigating Power Dynamics



Power dynamics often play out in coalitions:

- Clarify an intentional decision making process
- Prepare for how to handle outside influences
- Set up clear communication structures and feedback loops
- Articulate your coalition's shared values at the outset

Questions ?

