

# So you want to be a Candidate

A guide to being a candidate in a municipal  
election



## Preface

Being a candidate in a municipal election is regarded in many different ways by many different people. From the angry home-maker who wants to have a stop sign at the end of her driveway, to the slate of business people who are convinced that economic revival for the community rests with them, to the sports fan who wants a new arena, there are as many different reasons for being a candidate as there are candidates. However the common denominator of all municipal campaigns is that the people who participate are amateurs who need a framework to follow.

This short guide has been written in the absence of advice books and is designed for those who need guidelines and a framework and should be read in conjunction with the publication *Candidate's Guide* issued by the *Ministry of Municipal Affairs and Housing of the Government of Ontario*. For the others, those who will just do it - go ahead and good luck.

Cobourg, Ont. June 2000  
Ben Burd

## Acknowledgements

This book would not have been possible without the help of my friends. Patty Park who contributed her organisational resources and advice. Murray Weppler, the inveterate campaigner for his encouragement and mentoring. Art Cockerill for his non-partisan technical encouragement, and Deb O'Connor for her tireless proofreading. The style of this book will become obvious to you when you realise that it was heavily influenced by my training as a Project Manager. A political campaign is the perfect project for a P.M. Most campaigns have a beginning and an end; nirvana for a project manager!

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# Introduction

**E**lectoral campaigns, like most things in our world are forever evolving. The one constant is the need to identify those who will vote for you and then ensure that they cast their ballot.

“Getting out the vote” is at the core of this campaign guide. Ideal campaigns have hundreds of volunteers to help identify the “the vote” and “to pull” it on election day. If your campaign is at a much smaller scale, the principles and the methodologies listed here can be applied on a small scale consistent with your resources.

Apathy notwithstanding every vote does count and the “campaign” that “pulls” its “vote” has a better chance of winning than the campaign that doesn’t.

Murray Wepler

## **Author’s note**

Murray is a person who has devoted many years of his life to getting others elected in too many elections to count. He finally settled in Hamilton Township where (what else) he ran as a councillor in the local election and now spends his time gardening writing and helping others.

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## Thinking about it: the decision that is

**Y**ou or your friends are talking about local politics and it is decided that change is necessary and being a candidate is suggested to you, your first thought is to demand of yourself "Why". You will need a reason why you want to be a candidate simply because you will be asked many times "Why do you want to be a candidate?" As well you will need a good reason for your spouse!

### So what are your reasons for running?

Don't be shy about giving reasons for running for office, because if you can't you shouldn't even be in the race. Here are a few common ones:

#### **Thinking about it and now's the time**

"Well I have always wanted to be involved and now I have the time because, 'insert the reason here'".

#### **You have a burning issue**

Something that the previous council refused to do, or you think that nobody else feels as strongly as you do about a certain issue makes you think that only by being on council will the issue be resolved.

#### **I'll show them**

Quite often this reason is in response to the 'burning issue' but for some reason you feel that you have something to prove by getting elected.

#### **I'm the designated one**

This occurrence is common when a bunch of voters dealing with 'burning issues' decide that somebody has to be the candidate and you are designated by the group as the most suitable. Be careful what you wish for, you might win.



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## Planning, part one: the decision to be a candidate:

Campaign planning has two parts: the first is to assess the actual decision and the second is to plan the campaign. Being a candidate is not something that happens overnight, (OK it does to the impulsive but there's not many of those), it takes good planning. Here are some components of the plan that must be addressed, before the decision to be a candidate is made:

### Planning time

Planning to be a candidate means that there must be a timetable for planning. Leaflets and money do not mysteriously appear. Usually planning to be a candidate means that the decision to run must be made at least two months before Election Day if you are well known, or at least four months if you are unknown. These time-limits will vary according to the size of the municipality. Allow one month for every five thousand citizens. In municipal politics in a small town the usual time for public declarations of candidacy is Labour Day, two months before Election Day.

**Question: Do you have time to run a credible campaign?**

### Finances

Financial Planning is not just for RRSP's candidates need money (you can never have enough) and you must plan where to get it, when to get it and how to use it.

**Question: Can you raise enough money to run a campaign?**

### Time off work or family

In order to be a good candidate, and you usually have to be a good one to make it to the second campaign, you must have time in your personal life to commit. An election campaign usually means that some time must be put aside for it. Once elected you must have time to serve. Being a "part-time politician" is not that. A whole new definition to the term is realised once you win. If you are not prepared to spend at least an average of three nights a week out of the house and being on the phone for a few hours a week do not even consider the run. So if you have not prepared your family or the company you work for, for this time

commitment you will fail as a councilor. It should be noted that most councilors discover this after they are elected and spend the whole term playing "catch-up" with their wives and bosses. It is no surprise that the end result is either a failed marriage or a one-term politician!

**Question: Have you arranged time off with your family and employer?**

## Decision-time

You have considered the time involved in being a politician, can raise the money needed for a campaign and have the support of your family and employers. Now make the decision!

**Yes**



**Read On**

**No**



**Stop now: or read on  
so you will be able to  
help out your best  
friends when they  
decide to run!**

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## Planning , part two: the campaign:

**Y**ou have made the decision to be a candidate, your spouse and dog support you so far, and now you have to plan and execute the real campaign. Depending on many things this can take as little as one month for a minimal campaign to many more for a really effective one. Put simply if you do not plan the campaign before you start it you will not know how much money to raise or where to trim if you do not raise enough money. In the sections below we talk about having other people involved (Campaign Manager, CFO, Fundraiser etc.). In a small campaign you can, if you are very well organised, do these jobs yourself BUT it is not recommended - GET HELP.

### Planning finances and learning the campaign rules

Election campaigns are subject to government legislation governing the election period, registration filing of records, the siting of signs etc.. You must know all of these rules before you start or else the rules will bite you during the campaign. The best place to start is City Hall. During the election year there will be someone who is available to talk to prospective candidates and to explain the rules. When you pick up the nomination forms from City Hall you will also receive a *Candidate's Guide* that explains the legislation governing the election.

### Drafting a budget based on the campaign plan

Financial planning is preparing a budget. This will be based on the campaign that you intend to run. Total all the estimated components of the campaign, add a contingency and you now know how much money you need to raise. There is a worksheet, to help you, in the Appendix. The Campaign Plan is the description of all the components of the campaign, all the stuff you will use. You have to plan how much material and services you will need in order that you can set a budget.

### Headquarters (HQ)

The first major decision is to decide what type of headquarters, or campaign office, you will need. The size of your campaign will dictate whether you need an office somewhere or whether you can use your basement. Municipal campaigns in smaller towns need neither the visibility nor the size of a separate office. But if you do decide to use your basement/front porch or bedroom you will probably need a separate

telephone line, especially if you have children at home.

## **Points to consider when deciding on the HQ**

### **Location**

Location will be tempered by the cost. But if you can afford it the HQ should have parking and be in a central and visible part of the voting area.

### **Costs**

It is to be noted that the costs of the HQ are usually immediate as they consist of up-front costs demanded by the suppliers in the form of deposits.

### **Rent**

Obviously get the best deal you can. This can be achieved by only renting for the actual campaign period of one month.

### **Hydro, phone**

The hydro/utilities costs will be for the period of the rental but are accompanied by a deposit, which may actually cover the monthly cost so you could get some of your money back when you close the office. The phone charges will be an installation charge and for each phone line or "jack" you want.

### **Petty cash**

Most people forget to allow for petty cash.. This is absolutely necessary unless you want to be forever handing over money to anybody who needs mundane and routine supplies: coffee, paperclips, taxi fares for workers, etc. Petty cash is issued by the CFO to the office manager and used as necessary. A log should be kept for control purposes. The CFO usually sets up an account of \$100.00 and tops-up at the \$50.00 level.

## **What you will need in the office**

### **Phones**

You will probably need at least two lines, one for the landline and one for the internet and fax line. However if you intend to canvass by phone your volunteers will need more phones.

### **Fax**

A separate phone line should be set aside for the fax machine as most campaigns cannot schedule the arrival of faxes and therefore incoming faxes will be disrupted by having only one line. With the internet and email playing such a large part in modern campaigns it is recommended that the fax line be connected to the internet and email computer.

### **Computer**

Computers are such a part of modern life that to think about running an election campaign without one is a non-starter. Campaign records, desktop publishing, email, become much more efficient when a computer is used.

### **Desks/chairs**

Most offices are rented unfurnished, and that means that you have to supply desks and other furniture. One desk at least for the person delegated to be in the office. If you want to appear professional and candidatelike first impressions count. That means the office has to look busy, and be accessible during business hours. Remember that the whole expense of the office is completely wasted if it looks untidy and is unavailable to the voters. You might as well have used your garage to store all the stuff. To sum up; at least two desks, one for the manager, one for the receptionist/volunteer/kindly desk person.

### **Wallspace for maps**

Maps, and lots of them, are more than decoration. They will show the progress of the campaign, show volunteers where the polls are and cover the holes in the wall.

### **Storage space for signs**

Signs take up a lot of space, unless you can site them all as soon as you get them you will need to store them. The office is a good place.

### **Coffeemaker**

You will not be in the new office five minutes before somebody suggests going for coffee. Volunteers and "walkins" need coffee so a coffeemaker is a necessity.

## Campaign materials and people

This section defines the kind of campaign you want to run. Do you want to spend money on signs and then sit back, do you want to bang on doors to make up for the fact that you can't afford signs? Or do you want to do both? If you have lots of money and decide to buy advertising, where will you put that money? Radio/TV or the newspapers and if you have more than one paper in town which one do you pick?

## Signs

Designing, ordering, paying for, and obtaining locations for signs are all decisions that the campaign team has to make. This has to be done in the planning stage for the budget and because most sign companies are backed up during a campaign with your opponent's signs, be sure to order early.

### The types of signs

Household signs are the most common sign that a candidate will use. They are usually 24" x 12" and are two sided (either by printing on both sides of the sign or putting two signs back to back. There are three types of signs. Each design will have the election message and logo printed on it.

- Corplast:** Corplast is a corrugated paper sign that has been plasticised for weather protection. They stand up well but tend to curl around the middle and require one stake on a 24" sign, but are more effective with two.
- plastic bag:** Some manufacturers supply a silkscreened plastic bag that slips over a wireframe. These signs are printed on both sides. The wire frame is not sturdy.
- paper foldover:** This sign is a printed paper sign that is creased and designed to fold over a stake. This sign does not hold up well in wet weather. Any width over 12" usually needs two stakes.

**Location signs** are placed in empty spaces and cornerlots. They have to be seen at a distance and cannot be effective smaller than 4 feet in width and height. For a larger impact use larger signs.

**Office signs:** are those used in the HQ window or on the facia of the building. Check local bylaws for the style and size allowed.

**Stakes** are the wooden sticks that support signs. It should be the aim of the campaign to reduce costs by using signs that use only one stake. They are usually 4 feet long and 1.25 inches square.

**Buying the signs** In most elections there is a choice of suppliers. Always price suppliers and make the decision to buy based on a balance between construction, quantity discounts and delivery time. In some elections and with some candidates the choice of a unionized printer is important, in fact it is almost mandatory when candidates receive donations from labour unions. Getting the union "bug" will push the price up. When buying stakes it may be possible to buy 2' x 4' lumber and paying a campaign worker, who owns a table saw, to rip saw the boards into stakes.

**Estimating** how many stakes you need to buy will depend on the style of signs that is used.

## Leaflets

Leaflets are the most important pieces of campaign material used in the whole campaign. A candidate will never recover from mistakes contained in a leaflet. However the reverse is very true, a good leaflet will work wonders. The campaign team has to decide on the style (threefold, bifold or just a one sheet flyer), quantity (does every household get one?) and the kind of paper. All decisions affect the final price.

How many leaflets needed in a campaign depends on one variable; if leaflet deliveries will be made to every household or just selected areas. Some campaigns will only deliver, because of the lack of canvassers or the cost of delivery, to the priority polls. In other words don't deliver flyers to people who will not vote for you, it is a waste of money. In addition the candidate will need leaflets for distribution during the campaign. Plant-gates, All Candidates meetings and general mainstreeting demand leaflets. As a guide order 15% more leaflets than you need for household distribution.

**Design**, a threefold brochure made with a standard sheet of paper will produce six areas for text. Much information on a variety of subjects can be placed in a brochure. Printing costs will increase if more than one colour of ink is used. Whatever design is used the most important thing to be observed is the elimination of spelling mistakes and grammatical errors. Mistakes will reflect on the candidate, avoid them by buying good design and performing great proofreading.

**Distribution** of leaflets has to be determined because the way of distribution dictates how many leaflets will be used. For instance if all households are going to receive a leaflet the number of households in the voting area has to be known. If only the apartments are going to be mailed and the single-family dwellings will be hand-dropped by leafleteers or canvassers, then we have to know how many apartments and their addresses. The latest bulk mail rates should be determined.

**Postal walks** are the routes that the mail delivery people regularly walk. Campaigns have to know them if leaflets are going to be delivered by bulk mail. Some Post Offices demand that leaflets be bundled by the campaign according to the dwellings on the walk. In rural areas campaigns must know the route of the rural delivery because the voting area may not be the same and start and finish in different post office areas.

**Leaflet Dropping** is the term used to describe the delivery of leaflets to households by workers whose sole purpose that day is to deliver leaflets, as opposed to canvassing.

**Handouts** are the leaflets used by the candidate canvassing or at others events. Estimate these to be 15% of the number of leaflets dropped.

## **Advertising**

Advertising is the "black-hole" of the campaign. It can consume so much money without apparent results. The electorate will expect at least one advertisement in the local paper in the last week. A good campaign will design a bare bones advertising campaign and then buy advertising as donations come in. However because of the different methods of advertising opinions vary about which is the more successful. But if the campaign can

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afford to advertise then a marketing plan must be designed.

### **Advertising Media used in election campaigns**

#### **Radio/TV**

This media is expensive and production takes time, even if the candidate goes to the station to record the ads it still takes time. Radio needs 'saturation' to work well.

#### **Print**

Newspaper and magazine advertising is the most common election tool used by campaigns. It is relatively cheap and immediate.. Ads can be placed in 'classifieds' (cheap) or 'display' (expensive). The major choice to be made, in an area where more than one paper exists, is in which paper do we advertise? The choice should be made based on the friendliness of the paper to the candidate, price and delivery and location of the display.

### **Workers/helpers**

Anybody who decides to help a candidate has made, in their own mind, a big decision. That decision has to be appreciated and the candidate must nurture and encourage all the campaign workers. A campaign worker who feels unappreciated or underemployed will probably not stay long. A candidate must strike a rapport with all in the campaign, and never ever give the impression of not being able to win. Discouraged campaign workers are the first signs of defeat that the other candidates in the race are looking for.

#### **Recruiting**

When you announce your decision to become a candidate people should be attracted to you, if they are not you had better reassess your chances of success! As people come to the campaign they need to be welcomed and asked what they would like to do. The candidate will also be recruiting workers as the campaign progresses. Friends of workers should also be recruited. An election campaign is a fun event and a great social occasion, take advantage of that and pick up people as you go.

#### **Training**

All the major political parties and labour unions conduct campaign worker training schools. Try to recruit active partisans who have attended them and they can then train your workers. Training is not arduous or long but there is a right way and wrong way of doing most things in the campaign. For instance: when placing signs make

sure that the stake is naked when hammered into the ground. Banging a stake with the sign already assembled usually vibrates the staples from the sign and it falls off! And always try to recruit experienced people so that the candidate does not waste time training people.

**Deployment**

Once workers have been recruited and understand the rudiments of campaign work: smile and be nice, do not walk on people's grass and always talk about winning, then they have to be allocated jobs. This is a campaign manager's job, not the candidates. If there is a campaign office it has to be open at all times so a "nice kindly person" has to be found to work at the front desk. You find that person and the campaign can only go up from that point!

## Wrapping it all up

Now that you have worked through the chapter and understand the campaign components you have to estimate the costs. Using the worksheet itemize all of the components of the campaign that you intend to employ.

### Planning worksheet

#### Campaign Worksheet: the Budget

Campaign component	Unit price	Quantity	Total
<b>Headquarters (HQ)</b>			
Rent			
Phones			
Utilities			
Materials			
Petty cash			
Salaries and candidates exps.			
Mileage expenses			
Daycare			
<b>Signs</b>			
Household			
Large			
rental			
stakes			
<b>Leaflets</b>			
Design			
Householder			
Other			
Distribution			
<b>Advertising</b>			
Print			
Radio			
TV			
<b>Registration</b>			
deposit			
<b>Canvassing</b>			
expenses			
<b>Meetings</b>			
Hall rental			
<b>Total Campaign Expenses</b>			

**Budget Approval**

You have the budget, you have the workers, you know what the workers have to do, now have your campaign team approve the budget so they buy-in to the campaign and will know how much money has to be raised.

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## The people you will need to help you win

As you plan the campaign you have to think about your team. Even in the smallest of campaigns the candidate will have a key group of supporters to help them out. Whether the duties a small team undertakes are formalised, or not, the candidate will still need reliable people. It is recommended that every candidate name at least one person as the campaign manager. The public and the media will expect it. The Appendix contains details of the duties of all the key campaign workers. Even if the candidate in a small campaign can't afford a big team or decides it is not necessary all candidates should be aware of the mechanics of a big campaign. Too much knowledge about campaign management is not dangerous but necessary.

### Campaign Manager

No matter who you are you should have at least one dedicated supporter who will help, or direct, the campaign. You need somebody to organise the details. This person is called the campaign manager. The media expects legitimacy in a campaign and the quickest way to establish it is to name a credible and competent individual to be the campaign manager.

### Chief Financial Officer (CFO)

Money is topic number one in all elections, if you do not have access to money you will have difficulty in being elected. Unless of course you are related to everybody in town and then you still have to know those who aren't. You can only win if you have a "profile" and in most cases you have to buy one. Money, Money, Money!

That means that unless you have money in your own bank account (and the candidate's contribution limit is \$750.00), you will have to ask people for money. Now you have a decision to make: who will control the campaign finances? Under the law when you register as a candidate you have to setup a campaign account at a bank and declare who the signing and depositing officers will be. In a small campaign you can do it but in a campaign where you expect to a full-time campaigner do not think that you will have time run to the bank. So you have to appoint a chief financial officer (CFO).

The job of the CFO is to accept donations, deposit money, give out receipts, pay the bills and complete the financial records. All donations

have to be recorded, it's the law, and any greater than \$100.00 have to be published. When all donations are recorded, you can go back to your donors, later, for more money, and also you now know who to thank when the campaign is over. Money can be collected from the beginning to end of the campaign period, the first week in January until the last week in December of any election year.

### **Fundraiser(s)**

The candidate, at every opportunity, should ask for money. Anybody saying that they support you should be asked, "OK, you say you support me would you like to make a donation?"

### **Sign Manager**

Signs have emerged as the primary tool for success in election campaigns.. A candidate can never have enough signs. Consequently a busy candidate must delegate the responsibility for signs to a sign manager. This person will, find locations for signs, place signs and maintain the signs once they are up. Most municipalities have bylaws governing the removal of signs at the end of the campaign. It is good practice that the sign manager also be assigned that job.

### **Publicity/Communications person (Media Manager)**

In a small campaign this job will be part of the campaign manager's duties. In a big one it is a separate job. The campaign should be structured so that only one person speaks to the media about non-issue items. It should not be the candidate.

### **Office Manager**

Every office needs one of these: a person who can keep track of all the different activities that are going on, in the HQ, and yet never loses that smile.

### **Canvass Organiser**

This person should never be in the office because this the job is the organising of people to work the streets. Responsible for the canvassers in the polls and the phones this person must be personable, knowledgeable and optimistic. The reports from this person will be the first indication of success or failure.

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## **Execution, part one; the start of the campaign**

### **Setup records**

The first campaign chore is to go to your bank and open an account. All deposits must be recorded in a receipt book. Statements and cancelled cheque must be collected and become part of the campaign records. It is necessary to track all campaign donations and bill payments. The law also requires it.

Next setup a set of accounts, either in a ledger book or on a computer. This will allow the tracking of money and a paper trail for the auditors. Regular financial reports will be a powerful budgeting tool to keep the team on track.

One of the accounts should be a petty cash account, to be used in the campaign office for minor disbursements.

The reporting form (form 4) used at the end of the campaign by all candidates demands that all donations greater than \$100.00 be recorded. Make a separate list for your own convenience. You should hope that this will be a long list!

### **Candidate Nomination**

In Ontario, if you want to be a candidate in a municipal election it is the law that you have to be nominated as a candidate. When you go to the municipal office to file nomination forms (Form 1) you will be asked to prove that you are qualified to be a candidate, (be a resident of the municipality you want to run in, be a Canadian citizen, be over 18 years old and not be a disqualified voter). You will also be asked to pay \$100.00 (as a deposit) and fill out a form that demands your full name and address and details of your campaign bank account. This deposit is refundable if you get 2% of the vote. This must be done by 5 pm on nomination day: usually the second Monday in October (30 days before Election day).

## **Call the first campaign meeting**

Now that you are an official candidate now you have to make some hard decisions. To help you out call the campaign team together. Together you must make decisions about:

### **Signs**

- What style
- How many
- Locations
- When to order and who from
- When to put them up (if the election period has not started yet)

### **Leaflets**

- What design will be used?
- Copy and text
- Quantity
- Which printer to use
- When to order
- How to distribute: bundling, dropping, mailing etc

### **Fundraising**

- Setting the goal
- Who to approach for money
- Different methods of fundraising to be used
- How to handle donations that are dropped off in the office

### **Canvassing**

- Obtaining poll maps
- Determining priority polls
- Recruiting and organising canvassers
- When to canvass

### **Office (HQ)**

- Location
- When to rent and determining the duration of rental equipment arrangements
- Who will staff it
- What equipment is needed
- Obtaining equipment leases



**Advertising**

- How much can we afford
- What type of advertising will be used
- Where will advertising be placed
- Who will be designing and ordering the advertising
- When will the advertising be placed

**Other campaign business**

- All Candidates meetings and how to be organised for them
- The candidates speeches, who will write them
- Does the candidate need coaching help for the speeches and TV spots
- Which plantgates and other public mainstreeting appearances have to be organised

And, finally, make up an election calendar for display in the HQ. This will show everybody what the candidate is doing every day. (E30 to Eday)

All this to be done in one meeting sounds tough but do this job right and the rest should fall into place.

You have now finished the first phase of the campaign and have a firm plan. Now you have to implement it and monitor it daily for deviations and respond to the natural mistakes and the unexpected; which will occur every day.

## **Execution, part two: the real campaign**

### **The day to day stuff**

For thirty days, the official campaign period, a routine should be followed. The HQ opens daily and is staffed constantly. This office will dispense advice about the campaign to the public, establish routine paper work procedures like passing messages to various campaign officers, receiving donations and assigning volunteers tasks and the coffee pot is always on. The existing signs are maintained and new ones placed. The candidate canvasses polls and attends public meetings and events. Leaflets are assembled, distributed and dropped. Rumours and gossip is either swapped or created and generally the HQ should be a fun place, with serious overtones.

### **Designing regular meetings**

Doers hate meetings; however a meeting is the only way to get all the team members together at the same time. Regular meetings are necessary. In a campaign the teambuilding aspect of the process cannot be underestimated and meetings should be collegial affairs. Campaign meetings should be held at times that benefit the majority. Sunday evenings usually work well.

The agenda must be designed to discuss all campaign subjects and issues. Budgets should be updated, fundraising proposed, canvassing plans set for the week and sign locations discussed. The team should be discussing issues and strategy with the candidate. Any kind of gossip and rumour should not be discounted, sometimes these items provide the necessary comic relief for a weary team. One last word about meetings: appoint a ruthless chair and stick to the agenda.

### **Defining the Issues**

Issues that are strong at the start of the campaign, the ones that you have defined as being yours, may not be the issues that stay during the campaign. Candidates have to be flexible enough to move and stay with issues as they progress. That doesn't mean a candidate has to engage in back and forth commentary ("He said - She said"), that is just what the press would like to goad candidates into, but the candidate must learn when and how to say things in public. The management of issues may not be possible in the heat of the campaign but you must remember; if you don't want bad press, don't say anything before planning to say it. Nothing is ever "off the record".

## Dealing with the Media

Dealing with the media is an art form and should only be performed by experts and each campaign must have one.. However candidates can protect themselves by being aware of the process. The average political reporter bores easily and as such can only listen to the same speech once or at the most twice before deciding that it would be more productive to "get to the bottom of things". Ambushing the candidate with personal questions or trying to get the candidate to respond to alleged comments made by other candidates are common journalistic tactics. Candidates should not be tempted to answer. If candidates do decide to talk to the press the only protection they have is the knowledge that everything they say will be taken down and used against them!

A list of all media outlets and who the candidate or publicity person should talk to get the story out must be displayed in the HQ. A file of candidate's photos must be on hand for distribution to the media and a press kit should be developed and released on announcement day, or the opening of the campaign.

Press releases from the HQ are an effective way of handling the media proactively. You can control the agenda and the press has to follow up on what you are saying. Keep the announcement less than 100 words and only discuss one issue per release. Only release one issue at a time.

Although it sounds as though the media should be treated warily it should be an objective of the candidate to establish friendly relations with the reporters covering the campaign: just understand they will print everything!

## Handling the unexpected

Election campaigns thrive on the unexpected: opponents' mistakes that can be capitalized upon, the need for money to pay an unexpected bill, the disappearance of key workers to the other side, the vandalism of signs, the cancellation of important public meetings and many other cases of concern.

Election campaigns will neither be fun nor normal if day to day crises did not exist. Candidates and workers must learn to expect the unexpected and deal with it. There are no obstacles; all problems become opportunities!

## All Candidates meetings

These affairs are assuming great importance because of their symbolism. Usually it does not make much difference what is said just that a good show be put on! In every municipal campaign there is judged to be one important meeting (usually the meeting arranged by the Chamber of Commerce) and others. The campaign manager should attempt to negotiate conditions and rules for the meeting but the sponsoring agency will resist. The negotiations should be centered on:

- How long the speech is to be
- The candidate's speaking order
- Which media people will be attending
- The audience
- Will the public be there
- Opportunities for questions

## Canvassing

Canvassing is the process of calling on householders/voters, at their residences and talking politics to them. It is the best way of meeting the voters and an effective way of getting the candidate and the issues known. In a voting area each poll is about 300 voters and usually one person can canvass a poll in about 3 hours. To cut time down when canvassing with the candidate have a canvasser go to the houses ahead of the candidate, to determine whether the householder wants to meet the candidate. Always canvass the polls determined to be most favourable to the candidate first.

Canvassing is one of the better ways to recruit helpers. Determine sign locations and solicit donations. Voters' lists should always be carried by the canvasser and voting preferences determined and noted. DO NOT mark the list in front of the canvassed resident. Another

responsibility of the canvassers is to talk about the issues and determine voters' attitudes.

Canvassers will be assigned polls and then asked to complete the canvass by a certain date. This is intentional because if there are many canvassers the poll can be canvassed more than once. This makes the discussion of local issues, on the door step, immediate and relevant, it also ensures that householders receive campaign material on the issues. Canvassers should work under the direction of the Voter Contact Organiser.

# The Final Execution: Election Day

## The Candidate's job

OK the day has arrived, the candidate and the team have canvassed rigorously, the candidate has knocked on the majority, if not all, of the doors in the voting area and appeared at all the required public meetings. So what do you do until the votes are counted?

- Still make public appearances, go to that plantgate that you have missed
- Stand on the pavement by the busiest intersection holding a campaign sign
- Attend the local coffee shop 'senate' sessions.
- Walk up and down the main street of town.

**DO Not hide in the campaign office....get out in the open SHOW YOUR FACE.**

## The team's job

### Pull the vote

This is the process of reminding the people who said that they will vote for you to do so. Using the 'marked-up voters lists' phone each one of them, first to remind them it is election day and later in the day reminding them they haven't voted. You know this because the inside scrutineers you have stationed in the polling station have been checking who has voted and reporting back to the office.

### Organising the results

A big organisation will have a results map, with all the polls in the voting area organised into a large chart and the results for the candidates posted as they are announced. In a small campaign the candidates usually gather in the Town Hall where the municipal election team will be posting the results as they are counted.

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## **Risk management: the controlling phase**

### **Damage control**

In every campaign things will go wrong. Signs will not turn up on time, the photocopier stops halfway through the issue sheet printing thirty minutes before the all-candidates meeting, the canvassers have been reported to the police for littering, the candidate cannot gain entry to the only plant gate in town to name a few. These emergencies have to be settled and the situation has to be remedied in a positive way....no bad press.

If any of the situations cannot be resolved within twenty four hours the campaign will definitely suffer. All situations have to be settled daily. You only have thirty days to make your campaign a success.

DO NOT design the campaign in such a way that the candidate has to make the final decision. Delegate: ideally the campaign manager should be making all the major decisions on a daily basis. Most decisions cannot wait until the weekly Sunday evening meeting to be resolved.

### **Appoint a spokesperson**

When a crisis makes the news the candidate should not be the person who speaks to the media. At the beginning of the campaign appoint a publicity/communications person. In a small campaign this will be the campaign manager.

The publicity manager should issue statements about the problems and the release should stress the positive remedial action taken. If blame is to be assessed admit that somebody screwed up and move on.

### **When to respond and how**

The major mistake, and the easiest one to make, is to respond to every criticism levelled against the candidate or campaign. Only publicly respond to problems if they can be solved positively. Then you are announcing good news instead of reacting to bad news. If you do flood the media with announcements of a minor nature the media deems to be non-newsworthy then the big announcements you send will also be ignored. **Pick your spots.**

## The Campaign's over: closeout

**O**K, Election Day has come and gone and whatever the result the jobs are the same. The difference is when you win you don't mind doing the chores. Even if you are not going to run again, and believe me all losers feel like that, there are necessary chores that will enhance your reputation, please your suppliers and aid your allies, if you complete them.

### Office chores

These chores must be delegated before the end of the campaign or else the candidate will be doing them alone. And bills will pile up if they are not paid promptly.

- Restore the office to the condition you found it in when you moved in. If it was a pigsty then leave it clean now
- Cutoff the phone and utilities and arrange final billing
- Arrange for all rental equipment to be returned and final billing
- Remove all the materials (signs, leaflets etc.) and put in storage
- Take down the window signs

### Sign removal and cleanup

The signs around the voting area have to be removed. Not only is it the law but at an average cost of \$5.00 a piece you will want to use them the next time you run.

### Thank-you letters

The candidate should personally thank everybody who contributed in any way, as soon after the election as possible. If the candidate cannot speak to them a small card should be sent. All people who gave money should receive a thank you note from the candidate or the CFO, preferably the candidate. Just remember class pays off even if you never run again.



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## What to keep for next time

One cannot walk away from a campaign without any baggage or records. Some have to be kept, just to comply with the law. However careful candidates and campaign teams will keep good records during the campaign and then retain them afterwards. If the candidate intends to run again then the records are invaluable. Even if the attempt was a one-shot deal some other activist will find the records useful.

So keep everything! A list of what is useful is below:

### Records that should be kept

#### **financial records**

- Lists of bills paid (bank statements and cancelled cheques)
- Closed bank account information

#### **workers' records**

- Lists of helpers/workers and the jobs they performed
- Lists of people who donated items to the campaign (in-kind or actual gifts)
- Marked up voters-lists (supporters?)

#### **sign locations**

- The sign location list
- Sign suppliers and price lists

#### **fundraising records**

- Lists of donors
- Record of fundraising activities

### Inventory to be stored

- Signs and stakes

# Appendix

## Contents

### **The duties of the campaign workers:**

- Campaign Manager
- Chief Financial Officer
- Fundraiser
- Media Manager
- Office Manager
- Sign Chair
- Voter Contact Organiser

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## Duties of the Campaign Workers

### Campaign Manager

In a municipal election the campaign manager can perform most of the organising jobs outlined in this appendix but it is nice to have help. The campaign manager must be aware of the mechanics of running a campaign before deciding if the campaign has become too big and more delegation is necessary. The main function of the campaign manager is to relieve the organisational burden from the candidate. A campaign manager must have both organisational and motivational skills and work long hours under great duress. They must be 'people' people who can make major decisions independently and under pressure. Ultimately the style and conduct of the campaign is a campaign manager's responsibility. Although if the campaign fails to elect the candidate they can still say they did their best despite the candidate!

#### **The duties of the campaign manager are:**

1. Manage the activities of the candidate
2. Recruit the resources needed to carry out the planned campaign
3. To know intimately the layout of the voting area, its peculiarities, attitudes and cultural makeup
4. To know the number and location of each poll in the voting area
5. To know the number of eligible voters in each poll
6. To know the number who voted last time
7. To know the estimated number of voters who will vote this time
8. Motivate the campaign workers
9. Set out the rules for the campaign
10. Make decisions and perform crisis management
11. Generally know everything there is to know!

### Chief Financial Officer

The Chief Financial Officer is the banker of the campaign. Responsible for paying all the bills, depositing all the donations and maintaining proper financial records and filing the Financial Statement (form 4) with the municipality at the end of the campaign period

## **Fundraiser**

It is the function of the fundraiser to raise enough money to fund a campaign. If the campaign is planned properly the fundraiser will be working in two time periods: pre-campaign and campaign as well as collecting money all the time.

### **Fundraising methods**

#### **Direct Donations**

Solicit funds from:

- Individuals
- Businesses and Corporations
- Trade Unions and Labour Councils

#### **Fundraising events**

- Dances
- Bake sales
- Concerts
- Sales of novelty items: mugs/Tee shirts etc.
- Celebrity auctions
- Theatre nights
- Bowl-a-thons
- Garage sales
- Car washes
- BBQ and games days, charge admission to the picnic
- Pot-luck suppers/Dinners, charge to participate
- Book sales
- Lotteries/bingo

### **The nine principles of fundraising**

1. Be realistic: choose fundraising events and events that you know will be successful
2. Appoint event coordinators
3. Assemble a team of people committed to success
4. Plan ahead, give yourself plenty of lead time for events
5. Set deadlines that can be met
6. Be realistic about the amount of money that you can raise
7. Plan a long fundraising calendar to include fundraising events and a direct donation campaign
8. Remember: "If you don't ask you don't get."
9. Remember to thank donors immediately

### **Duties of the fundraiser**

#### **1. Maintain an Individual Donors list**

This master list may become the major record of the campaign due to its comprehensiveness. The fundraiser has to live and breathe with this book, even sleeping with it so it does not get lost. This book should include the names of:

- The past donors list
- Members of the campaign team
- Previous campaign workers
- Canvassers
- Sign crew members
- All other workers
- People who have been referred by the candidate
- Walkins to the office
- Identified voters from a previous campaign
- Other people identified by the campaign team  
and
- Sign locations

**2. Contact all names on the Donors list**

Mail or phone but contact all individuals on the list, if only to verify the reliability of the name. Mail letters to unions, to businesses and corporations. **Always ask for money!**

**3. Follow-up the request**

Another phone call must be made to all initial contacts that have not given money. This time have an assistant ready to drive to the house to pick up the cheque that you hope to persuade the contact to give to you. In the conversation always explain what the money is going to be used for and how much the campaign is trying to raise. **Always send a letter of thanks to the donor.**

**4. Conduct and coordinate the fundraising events**

**5. Recruit, train, and then delegate responsibilities to assistants**

## Media Manager

A key member of the team is the media manager. Responsible for the production of the advertising, leaflets and publicity this person should be on the job well before the campaign starts. The duties are:

### 1. Research

- The issues
- The opponents
- The local attitudes towards the issues and candidates.
- Draft campaign's written materials
- Issue papers
- Leaflets:
  - design
  - write
- Liaise with the printers for price and delivery
- Hand to the canvassers for distribution
- Prepare the speeches
- Business cards and letterhead

### 2. Advertising

- Research rates
- Buy adspace
- Design the ads
- Determine the rate of advertising (especially important in radio/TV)

### 3. Camera work

- Candidates photos
- Campaign shots for leaflets or news stories

## Office Manager

The office manager's job is to oversee the activities of the campaign office (HQ), direct the volunteers, manage the paperflow and be the receptionist. A good office manager should possess a sense of humour, and be able to respond to the inevitable emergencies.

### The duties are:

1. Working with and organising the volunteers
  2. Maintaining a proper paper flow system
  3. Coordinating the activities of the systems that flow through the office, fundraising requests, placing signs and canvassing polls
  4. Maintaining a calendar of events
-

5. Understanding the Elections Act and the voters list
6. Knowing where and when the advance polls are being held and how people can vote in the advance polls
7. Proxy voting (are the forms handy?)
8. Arranging rides to the Polls on election day
9. Maintaining a steady supply of coffee and refreshments in the office
10. Developing a cleaning schedule for the HQ
11. Issuing temporary receipts for donations
12. Controlling the petty cash account
13. Creating and maintain a master list of volunteers
14. Cleaning up and cleaning out the HQ at the end of the campaign.
15. Moving the records for the next campaign to storage

## **Sign Chair**

The sign chair is responsible for implementing the sign campaign. The chair needs to be hardworking, organised and can delegate work, be calm at all times and possess a sense of humour and a car.

### **The duties are**

#### **Pre-campaign**

- Estimate the number of signs
- Estimate the types of signs needed (small, or big)
- Prepare the budget

#### **Campaign**

- Decide how to pace the sign campaign, slowly or a blitz?
- Recruit a sign crew and obtain transportation
- Obtain the sign locations from the lists and office and place the signs
- Maintain the signs.

#### **Post campaign**

- Remove the signs and store for the next campaign
- File the sign list with the post campaign records.

## **Voter Contact Organiser**

This person controls the activities of the canvassers, foot and phone. Most campaigns depend on canvassers so this person must be well organised, dependable and pleasant. Definitely a people person needed here. Responsible for a number of polls in the voting area this person is the local campaign in the early stages.

### **The duties are:**

1. Recruiting canvassers
2. Monitoring and supervising the foot and phone canvassers
3. Keeping in constant touch with the canvassers
4. Identifying the priority polls
5. Training recruits
6. Identifying the voters
7. Interpreting the information coming from the canvassers
8. Relaying the information to the campaign committee and preparing to change the canvass strategy.



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## Volunteer Questionnaire Form

### Will Do Slips

To be filled out by the Office Manager whenever a volunteer says "Can I help?" A supply of these forms should be kept in the HQ and filed away in a binder when completed. This binder will form part of the post campaign records

A sample slip is reproduced below

<b>Will do</b>	
<b>Will do</b>	<b>Date</b>
<b>Name</b>	
<b>Address</b>	
<b>Phone # (h)</b>	<b>(b)</b>
<b>Experience</b>	<b>Has car</b>
<b>Comments</b>	
<b>Available</b>	<b>Will come in</b>
<b>Taken by</b>	<b>Source</b>
<b>Confirmed</b>	

## Campaign Budget Worksheet

<b>Campaign component</b>	<b>Unit price</b>	<b>Quantity</b>	<b>Total</b>
<b>Headquarters (HQ)</b>			
Rent			
Phones			
Utilities			
Materials			
Petty cash			
Salaries and candidates exps			
Mileage expenses			
Daycare			
<b>Signs</b>			
Household			
Large			
rental			
stakes			
<b>Leaflets</b>			
Design			
Householder			
Other			
Distribution			
<b>Ads</b>			
Print			
Radio			
TV			
<b>Registration</b>			
deposit			
<b>Canvassing</b>			
expenses			
<b>Meetings</b>			
Hall rental			
<b>Total Campaign Expenses</b>			

## Notes

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*“Democracy is the process by which the people are free to select the man who will get the blame” Laurence Potter*

“A free society is one where it is safe to be unpopular” Adlai Stevenson”

*“Freedom to speak is when the people can speak, Democracy is when the government listens” Alistair Farrugia*

“It’s dangerous to be right when the government is wrong” Francois Voltaire

“It’s not the voting that’s democracy, it’s the counting.”  
Tom Stopard

Half of the American people never read a newspaper. Half never voted for the President. One hopes it is the same half!” Gore Vidal

**Some selected quotes about  
democracy**