

Campaign Manager Training

Before we start...

1. What's your name, what are your pronouns, and what neighbourhood do you live in?
2. How do you plan to be involved in the municipal election? Are you already a part of a campaign?
3. What is one thing (it can be general or specific) that you're hoping to get out of this workshop?

What we'll cover

- Campaign fundamentals
- Role of a campaign manager
- Working with a candidate
- Campaign planning
- Building your team
- Establishing a good culture
- Budgeting, finances and fundraising
- Endgame, election night and post-campaign

3 days of training in 3 hours – high level!

Campaign fundamentals

- Get more votes than everyone else by:
 - Persuading people to support your campaign
 - Motivating and mobilizing supporters to vote
- So simple! Right...?

A basic framework for the key building blocks of any campaign is the 3 M's:

- **MESSAGE** – what we have to say, and how we say it.
 - Who are we delivering our message to?
 - What messages do we use and when?
 - How do we deliver our message (tactics)
 - Who are our messengers?
- **MOBILIZATION** – what we need people to do, and how we motivate them to do it.
 - Who are we mobilizing?
 - Why are we mobilizing them?
 - How do we do it?
- **MONEY** – fuel to ensure our campaign reaches the necessary scale to have an impact.
 - Not just about fundraising – but the careful stewardship of supporters investment

Voter contact basics

- Identifying supporters of your candidate using such innovative methods as asking people if they support your candidate (door knocks, phone calls, texting...)
- Recording the data collected for different types of follow-up.
- Remind supporters to vote and mobilize strong supporters to join your campaign, target undecided voters with persuasion messages, don't waste time on strong opponents.

Campaigns are an exercise in list building

- Good list management is important for:
 - Escalating engagement with supporters
 - Making the best use of your candidate and volunteers time
 - Identifying emerging issues
 - Efficiently converting support into votes
- Hopefully, you are able to build on lists that already exist – ensure that you finish with lists that can be used in future.

Where do votes come from?

- **PERSUASION**

Increasing the size of your pool of supporters;
and

- **MOBILIZATION**

Increasing turnout among your pool of supporters

Discussion

- What are the communication tactics available to campaigns to get their messages out to voters?
- Think of a tactic that would work for each of the following:
 - Identifying support
 - Persuasion
 - Recruiting volunteers
 - Increasing supporter turnout

Support – Turnout Matrix

	<i>Least likely to vote</i>		<i>Most likely to vote</i>
<i>Least likely to support</i>	A	B	C
	D	E	F
<i>Most likely to support</i>	G	H	I

In municipal elections, especially with large wards, incumbency is a major advantage

Since switch to the 25-ward map in 2018:

- 54 council races (2 general elections + 4 by-elections)
- Of the 13 non-incumbents elected:
 - 11 ran in open seats (including 4 by-elections)
 - 1 the incumbent died just before election day
 - 1 defeated an incumbent

What do recent non-incumbent wins look like?

Candidate		Year	Incumbent Running?	First Campaign?	Votes	Vote Share %	Campaign Spending
Cynthia Lai	Scarborough North	2018	No	<u>Yes</u>	5,589	27.02%	\$92,920.53
Brad Bradford	Beaches-East York	2018	No	<u>Yes</u>	14,286	38.56%	\$73,009.72
Jennifer McKelvie	Scarborough-Rouge Park	2018	No	No	11,624	40.21%	\$61,540.04
Ausma Malik	Spadina-Fort York	2022	No	No	8,033	36.55%	\$105,944.11
Alejandra Bravo	Davenport	2022	No	No	17,009	70.72%	\$101,613.85
Dianne Saxe	University Rosedale	2022	No	No	8,614	35.37%	\$84,307.32
Lily Cheng	Willowdale	2022	No	No	8,337	41.72%	\$74,938.50
Amber Morley	Etobicoke Lakeshore	2022	<u>Yes</u>	No	15,271	46.44%	\$73,834.00
Jamaal Myers	Scarborough North	2022	***	<u>Yes</u>	5,315	51.09%	\$61,612.92
				Average	10,453	43.1%	\$81,080.11

Discussion

For incumbents: What are some ways that you could leverage incumbency to ensure your councillor is re-elected?

For non-incumbents: What are some ways that you could counteract the benefits of incumbency on your opponent?

Role of a campaign manager

Core accountabilities

- Create a basic administrative process for the campaign
- Develop and implement the campaign strategy and plan, adapting when required as you go
- Assemble and direct the campaign team
- Draft and oversee the campaign budget
- Create a positive and respectful campaign culture
- Enable your candidate, staff and volunteers to do their best work

Discussion

- What traits do you think a good campaign manager should have?
 - What's essential, and what is a nice-to-have?
 - What would be not so great?

Election rules and regulations

Key Dates

NOMINATIONS OPEN – May 1st to August 21st

MAIL-IN BALLOT APPLICATIONS OPEN – September 1st to September 24th

ADVANCE VOTING – October 6th to October 11th

ELECTION DAY – October 26th

More key dates will be announced by the City as they are determined

Phases of a municipal campaign

Apr	May	Jun	Jul	Aug	Sept	Oct
LAUNCH						
CAPACITY BUILDING						
			IDENTIFICATION, PERSUASION & AWARENESS			
						GET OUT THE VOTE

Donations (City of Toronto)

- Anyone over 18 who resides in Ontario can give.
- A contribution greater than \$25 cannot be in cash
- \$1200 maximum donation to individual candidate
- \$5000 is city-wide maximum donation amount
- This maximum does not apply to a candidate giving to themselves.
- Max personal contribution is lesser of either \$25,000 OR \$5,000 + 20 cents times eligible voters.
- A candidate and his or her spouse may obtain a loan only from a bank or other recognized lending institution in Ontario, to be paid directly into the candidate's campaign account.

Outside the limit expenses

- Election night parties and volunteer appreciation events post-election day with a budget of up to 10% of your overall spending limit.
- Fundraising costs, including hiring a fundraiser or hosting a fundraising event.
- Auditor fees.

Canvassing and outreach

- Landlords and condo boards are required to allow access to their buildings for canvassers during the election
- Similarly landlords and condo boards are not allowed to prevent tenants from displaying elections signs (law is different to practice with many landlords on this). Condos may still set conditions on sign dimensions and ban them from common areas.
- Campaigning on TTC property is permitted but only outside the fare-paid areas.
- City facilities and infrastructure cannot be used for campaigning purposes (eg booking a campaign rally at a city-owned community centre), nor is campaigning at city hosted events permitted. This does *not* apply to Toronto Public Library facilities.

Some differences from other elections

- Voting is by tabulator – very fast results, and regular updates during voting periods on turnout
- Large polls – require breaking up to practically canvass
- Rebate on donations for council and mayor functions differently – not a tax credit.
- No parties means much less support on things like designing materials, platform/policy, tech, staffing etc

Working with your candidate

What *are* candidates?

- People!
- The voice and face of your campaign
- Your best motivator, persuader and often fundraiser
- The hardest person to schedule
- Usually feeling a tremendous amount of pressure

What do you need to know about your candidate?

- What are their personal strengths and weaknesses?
- What relevant experience do they bring into the campaign?
- Is the candidate known in the community or parts of it? For a particular reason?
- What issues they are most comfortable with?
- What are their favourite things to do on the campaign? And what do they hate doing?
- What key issues do they need help with?
- Are they a morning person?
- Family obligations? Family involvement?
- Are their parts of their identity that require your consideration and understanding?
- Routine / Self Care?
- Most importantly - Why are they running?

Creating a campaign plan

*A plan is only a plan if it is
written down.*

Creating a campaign plan

- **Strategy** is your blueprint for winning.
- **Tactics** are deployed to support that strategy.
- **Capacity and resources** dictate the tactics that may be utilized.

Goal setting

Are you focused on winning now, or building for the future?

- Requires an honest conversation with your candidate very early so that expectations are clear.
- “Win now” campaigns should also be building for the long term.
- Your primary goal will influence your strategy and tactics.

What are some other goals you could set for a campaign?

SWOT Analysis - An honest assessment

Internal	Strengths Characteristics that give you an advantage	Weaknesses Characteristics that place you at a disadvantage
External	Opportunities <i>Elements that may be exploited to help you improve and grow</i>	Threats <i>Circumstances that could weaken your position</i>

Exercise

Brad Bradford is running for mayor again...and he needs your help!

Imagine you are his campaign team and conduct a SWOT analysis of his candidacy.



Debriefing past campaigns

- How many times did you foot/phone canvass key polls?
- How many sign locations were there?
- How many volunteers for foot, phone, sign, GOTV?
- How many supporters were identified?
- How many votes did you get in the advance polls?
- How many votes did you get on election day?
- What was your total budget?
- How much money did you raise?
- What worked? What didn't?
- What were the top issues last time?
- Is your candidate running again? Is your opponent?

Strategy

Developing your strategy is answering the question:

“How can we turn what you have (strengths and opportunities) into what we need (to overcome your weaknesses and threats), in order to win?”

- It should be based on your analysis.
- Lays out a clear path to achieving your campaign goal.
- Must be easy to explain, transparent, and collectively understood by your team.

Strategy

No single template for a campaign strategy, but it could include elements such as:

- Target (eg. prioritize increasing apartment turnout over homes)
- Tone (eg. emphasize opponents failures over our own virtues)
- Message (eg. bring services to our ward, etc.)
- Method (eg. prioritize group canvasses and signs over phone calls and leaflets)

Every element must be supported by your analysis, in service of your goal, and specific to your circumstances.

Key parts of a campaign plan (1 of 2)

- **Context**

- SWOT Analysis
- Overview of opposition
- Top local issues – existing and those that may come up

- **Messaging**

- Central theme of the campaign
- Campaign message box

- **Campaign Team**

- Roles and responsibilities
- Gaps to prioritize filling

- **Resources**

- Assessment of volunteer resources
- Support from labour and other groups and organizations

- **Fundraising**

- Amount to be raised
- Timetable with set goals

- **Poll Analysis**

- Areas of strength, weakness, and potential growth

Key parts of a campaign plan (2 of 2)

- **Poll Analysis**

- Areas of strength, weakness, and potential growth

- **Targets**

- Number of votes necessary to win

- **Voter Contact Strategy**

- Foot, Phone, Candidate canvassing
- Events and other activities

- **Sign Strategy**

- Number of signs to be purchased – large and small

- **Communications Strategy**

- Number of leaflets and size of print run and distribution
- Special interest pieces and translations

- **Online**

- Website
- Social Media and Email

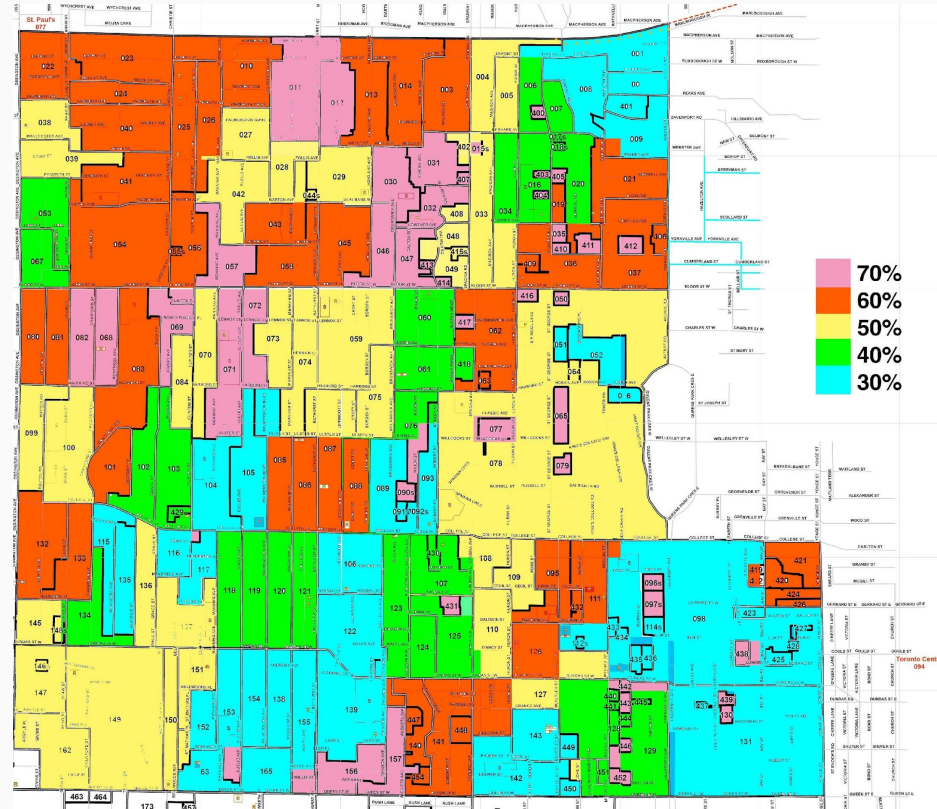
- **Paid and earned media**

- **Get Out The Vote**

- How you will GOTV in the advance, by mail and on e-day

Poll-by-poll analysis

- Look at past results by geography
- Identify where the 10k-15k votes you need to win will come from, one poll (aka subdivision) at a time
- Are there outcome-changing trends over multiple elections?
- A single campaign can be misleading
- Do the same for your opponent - where is their base?
- Has there been new development in the ward/new voters moving in?



Building a strong team

Volunteers

Nothing gets done without volunteers. Every effort must be made to find them and keep them coming back.

- Respect their time
- Proper training and instructions
- Promote a team environment
- Get to know them
- Praise and thank them – and make sure your candidate does too
- Encourage them to take on more responsibilities
- Make it fun!

Campaign Roles

Core roles (prioritize filling these roles with staff or a high capacity volunteer):

- Campaign Manager
- CFO/Financial Agent
- Voter Contact Organizer(s)
- GOTV Organizer
- Candidate (a pretty important one)

Additional roles (also essential, but can be doubled up with other duties and/or covered by volunteers on lower resource campaigns):

- Candidate Aide/Handler
- Office Manager
- Communications
 - Media/Publicity
 - Policy
 - Web communications
- Fundraiser (essential if you have lots of donor prospects)
- Sign Coordinator
- Data Manager
- Paid canvassers

Where to find campaign staff?

- Great volunteers from past campaigns (including provincial/federal)
- Training conferences like this one!
- Ask other candidates/campaigners you know for recommendations
- Friendly local electeds at other levels of government
- Note: unions can no longer release staff to campaigns (it's considered a contribution), but they may still have skilled staff who want to get involved and can take a leave of absence or use personal or vacation time.

Campaign contract

- Given the short length of the campaign and lack of administrative capacity, any staff you hire are contractors rather than employees and will need to invoice the campaign for their work.
- A campaign contract is necessary to define things like working hours, time off, rate of pay, and expectations around the rules and conduct.
- You need this for everyone filling a paid role on the campaign – full/part time or honorarium.

Establishing the culture

Values-driven management

Nobody can win an election alone.

In addition to being a strategist, a number cruncher, a candidate whisperer and a comms wizard, campaign managers are also managers in the traditional sense, leading a staff team.

It is essential that you don't under-prioritize this!

DO

- Check in on team well-being with regular team and 1:1 check ins
- Talk about individual goals and support, not just campaign goals
- Share progress updates, and give feedback and clear direction
- Make time to bond and socialize – and think about inclusivity in your social plans
- Consider your own well-being

DON'T

- Make people work late for the sake of it. If things are done for the day, take down time when you can get it!
- Apply rules or policies (eg days off or start/finish times) inconsistently.
- Ask people to do things you aren't willing to do yourself.

Exercise

- What are some other ways that you could create a healthy culture in a campaign?
- In pairs, talk about an election campaign or volunteer experience you've had that was positive and report back.
 - What was good about it?
 - Did you go back to help out more than once? Why?
 - Did the team you interacted with do something to make it positive?

Exercise

- Working backwards from a spending limit of \$80,000, draft a rough budget for a 2 month campaign in downtown Toronto.
 - Half the group will work on an expenses budget.
 - What are your priority items? Can you afford everything that you want to do?
 - The other half will focus on the fundraising portion of the budget.
 - How many donations do you need at different levels? How will you get them?

Making your budget stretch

- Running with a trustee candidate and sharing some expenses
 - Shared office space, joint literature pieces, a shared lawn sign design
 - Remember the trustee needs to raise their share!
- Don't order more than you need
- Shop around for an office, and don't rent too early
- Hire a part time or full time fundraiser
- Don't stretch your budget by underpaying your team!

Endgame, election day and beyond

Get out the vote

- Get a GOTV organizer assigned well in advance and check in with them regularly
- Trust them to lead and execute the get out the vote strategy - but it's still your responsibility to know exactly what's happening and keep things on track.
- Scrutineer the advance voting locations yourself on day one to get a feel for the process.
- Make sure print orders are in with plenty of time and sufficient counts.
- Don't run out of money for GOTV!

- Increasing proportion of votes being cast before election day (advance, by mail)
- No longer one “election day”, but several opportunities to vote.
- That impacts campaign rhythm.
- Maximize voting opportunities and reminders for supporters not certain to vote
- Mail-in ballots in Toronto since 2021 – still quite new but growing in uptake

Mail-in ballots increase turnout

2022 Toronto municipal election – just 1.3% of voters received a mail-in ballot (25,248)

- Overall voter turnout: 29.2%
- In-person voter turnout: 28.5%
- Turnout of voters who received a mail-in ballot: 75.9%
- First municipal election with mail-in voting option

2025 UK Local Elections – 17.5% of voters received a mail-in ballot (2.4 million)

- Overall voter turnout: 34%
- In-person voter turnout: 27%
- Turnout of voters who received a mail-in ballot: 69%

Huge potential to change turnout through mail-in voting. Need to incorporate into GOTV strategy, dispel myths about it being complicated.

Endgame

- Focus in on the core message of the campaign for the last 2 weeks.
- Make sure your candidate is as visible as possible.
- Scrutineer the advance voting locations yourself on day one to get a feel for the process.
- Think about when to stop identifying supporters (E-2 ish) to allow for proper election day prep.
- Avoid making predictions, but be honest with your candidate about how things are going so they can prepare.
- Exchange contact info with rival candidate for election night calls.

Election day and election night

- If you've got a well resourced campaign with a good GOTV organizer, your role becomes much less intense on election day.
- Pull vote, run a zone house, be a runner or a floating support to your team – whatever fits the needs of the GOTV strategy.
- Check in with your staff and candidate.
- Keep the group receiving results after polls close tight, and set the right mood (optimistic, calm, professional)
- Communicate the results to your candidate in the way they feel most comfortable – generally sending them home is best, but some like to be with the team.

Post-election

- Speak to people in advance (or define it in your contracts) to ensure that you have sufficient staff around for wrap up.
- Signs must be collected quickly (within days), and your candidate will need to decide if they want to keep or dispose of them.
- Aim to clear out your office by the end of the month.
- Don't shred anything until all the valuable data has been entered.
- Supporter appreciation/thank you cards
- Debrief with your team and candidate

Questions? Comments? Ideas?

Let's stay in touch!

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